42SMAR - Team Portals: Our Secret Sauce to Stay Focused and Communicate Effortlessly

Top 20 Questions & Answers

1. **Q: Can a dashboard be shared with people outside Smartsheet, like on a website or directly to another person?**
    A: Yes, absolutely! You can publish a dashboard and embed the link anywhere you'd like outside of the Smartsheet platform. Clicking on a published dashboard link will bring up the dashboard in view only mode.

2. **Q: How do you make a portal?**
    A: You can start building a portal by creating a dashboard and starting from scratch, or by using one of our pre-built templates from the solution center.

3. **Q: Where can I find more information on portals?**
    A: Check out our learning center content for portals to learn more.

4. **Q: What is the difference between a dashboard and portal?**
    A: They use the same feature, dashboards, portals are simply a way you can use a dashboard - a use case - like a team portal.

5. **Q: Can I embed external content into my team portal?**
    A: Yes, you can embed external content into your team portal using the web content widget. Only sources on our approved source list that support iframes can be embedded into the web content widget. To learn more, check out our help articles.

6. **Q: How do you add clickable icons to your dashboard?**
    A: The icons seen in this session are images added through the image widget. You can assign hyperlinks to image widgets so when a user clicks on the image they are taken to the hyperlink destination. Anyone with admin access to dashboards can do this!

7. **Q: Can you search within a dashboard?**
    A: Search is not supported within dashboards, but you can hit ctrl-f (on PC) and apple-f (on Mac) to search for specific text and terms.

8. **Q: How do you add text to your dashboard?**
A: You can add titles to your dashboard using the title widget, or general text using the rich text widget.

9. **Q: Can you add links to other sheets, reports, and dashboards in a dashboard?**
A: Yes, you can add links to Smartsheet items and external websites using the shortcut widget.

10. **Q: How did you embed a form in your dashboard?**
A: Smartsheet forms can be added to a dashboard using the web content widget. This is a great way to collect information right from a dashboard without requiring the user to click elsewhere. To learn more, check out our help article.

11. **Q: How did you add a calendar to your dashboard?**
A: You can embed the calendar app, or a published sheet in calendar view, directly into your dashboard using the web content widget.

12. **Q: Is there a way to customize widget content so it's unique for the person viewing it?**
A: Yes! Using the report widget and current user function you can ensure users only see rows assigned to them - making widget content unique.

13. **Q: What is the best way to start building a portal? Your example seems pretty in depth.**
A: One of the best things to do before you start building your team portal is outside of Smartsheet - whiteboarding! Our team will often draw out the widgets and content they want in a dashboard on a piece of paper or whiteboard, and then build out the portal with a solid destination in mind.

14. **Q: I saw the announcement about a new dashboard UI, when will that be available?**
A: The updates you saw to dashboards will be available early next year.

15. **Q: Can you create charts from reports?**
A: Yes, you can create charts from row and sheet summary reports.

16. **Q: Can you use the metric and chart widgets with groups and total on reports?**
A: At this time you can not use groups and totals from summary as inputs for the metric widget or report widget. This is something on our roadmap.

17. **Q: How does the upcoming user interface change impact the way I'll be updating widgets?**
 A: When we make the new dashboard user interface generally available early next year, all widget editing will move out of the pop-up editor into the right panel. This will allow users to update widgets and see changes in the context of their dashboard.

18. **Q: Can I add additional fonts to my dashboards outside of the default options?**
 A: Custom fonts are not supported at this time, but this is something on our roadmap.

19. **Q: What about custom colors, are those supported on dashboards?**
 A: Custom colors are not supported at this time, but will be included in the upcoming user interface change for dashboards early next year. That release will include a custom color picker that will support HEX & RGB codes, as well as a custom color wheel where you can select colors from a gradient.

20. **Q: Can you update the background color on dashboards?**
 A: Yes you can, there are two options at this time - white and gray.