

44SMAR - Become a Dynamic View Dynamo

Top 20 Questions & Answers

1. Q: With Dynamic View - Does the viewer have to be a licensed user of a plan that has purchased Dynamic view to see what you sent them?

A: No- Only the creator in Dynamic View needs to be a licensed user on a plan that has purchased Dynamic View. Any free collaborator in Smartsheet can view and interact with Dynamic View.

2. Q: Is there a way to customize the subject line of our intake form alerts?

Specifically we would like the requestor's name to be mentioned in the subject line.

A: In any of our alerts or automations you can use double curly brackets and the column name to automatically pull data from that row. For example, "{{Name}} Has Submitted a Request"

- 3. Q: Our company has Dynamic View Can we use it to personalize Dashboards?

 A: You can embed a dynamic view url directly into a dashboard using the web content widget to simulate this experience.
- 4. Q: Is there a "print option" within Dynamic View?

A: Not at this time - no. Our hope is to create enough support through various mechanisms (mobile, desktop) that you can continue to enjoy the dynamic nature of Dynamic View rather than printing data that will become stale right away.

5. Q: How can we have an ongoing dialogue with other IT professionals about solutions like these?

A: Check out the IT Professionals group in the Smartsheet Community here!

6. Q: In Dynamic View how did you get the new request to sit on the top of the list of open projects?

A: By default new requests are automatically added to the top of the page when you are using the form for submissions.

7. Q: Can you add an SLA to submitted tickets?

A: You can either provide your end users with a drop down where they can self select their preferred SLA. You could also add this as a drop down directed to the IT team member to select once the request is submitted. It really depends on the solution that will work best for your specific team.

8. Q: In this particular session - where did you set up the form?

A: In this session the form lived within Dynamic View. If you are an organization that doesn't have access to Dynamic View you could use a form in Smartsheet. If you need help - our <u>Solutions Team</u> can be brought in to build this for you!

9. Q: Once a user fills out the form - where does the data go?

A: In this session the form is accessed in Dynamic View. The information collected in Dynamic View is flowing directly into a sheet in Smartsheet

10. Q: How does the user know the form they've completed has been submitted?

A: The user clicks on the "submit" button on the form - and a confirmation message is delivered.

11. Q: Will this work with JIRA?

A: Smartsheet has a JIRA connector which is a premium add on that could definitely be added into a solution like this. Additional information is available for you <u>here</u>.

12. Q: How were you able to include the sheet data in the form automatically?

A: You automatically pass information from item to item by altering the URL. Additional information is available for you <u>here</u>.

13. Q: Is there any way to pull embedded images into a dynamic view?

A: Not at this time but this is something we are working on. Make sure when you have great ideas like this to submit an <u>enhancement request</u>. This puts the request in the hands of our product team.

14. Q: Can you create a solution like this without Dynamic View?

A: Certainly. You can mimic much of what we see here with Smartsheet Core App. Dynamic View provides you with the ability to isolate who has access to the underlying sheet and provides your viewers with a mechanism to see all submissions they've input over time.

15. Q: What is Bridge exactly?

A: Bridge helps you connect data across systems and automates routine tasks, increasing accuracy and efficiency, so that your team can spend more time innovating. You can find more about <u>Bridge</u> here.

16. Q: How did you set the solution up to dynamically change the year?

A: You can use the formula Year(Today()) to pull out the specific year based on today's date.

17. Q: Is there a formula I can use to automatically update my Dashboards from 2020 to 2021 in January?

A: Yes - You can use the formula Year(Today()) to pull out the specific year based on today's date.

18. Q: What is "Current User?"

A: The "Current User" setting serves up only items assigned to the individual viewing the Smartsheet object. It is enabled by using the contact column type column.

19. Q: Does "Current User" work for people without a Smartsheet license?

A: Yes. Anyone with a Smartsheet account (including free users) can be shared to, view and use Dynamic View or the "Current User" view within a Smartsheet item.

20. Q: How can I purchase Dynamic View?

A: Reach out to your business advisor for additional information!