smartsheet

Smartsheet Dynamic View
Overview

For many business processes such as order management, vendor collaboration, and creative requests those managing the process need to maintain control and cannot afford full transparency.

Smartsheet Dynamic View enables business users to maintain the confidentiality required for these processes by preventing users or vendors from accessing the full sheet, without hindering the collaboration required to quickly execute work — all without needing full access to the underlying sheets.

Business users can selectively share elements of the work with vendors or other teams and invite collaboration only on certain fields.

Collaboration With Confidentiality

Collaborate confidentially with vendors, mixed internal and external teams or across orgs (e.g. Financial Operations - Vendor Management scenarios) without them knowing about each other.

Simplify Views into Complex Work

Simplify views into a complex process such as order management scenarios where the process is complex but each person only needs a partial view of their work.

Supports Diverse Departmental Request Management Scenarios

Order Management

Order management is an example of a complex process. Multiple teams need to have their customized views into the process with each team being able to update only their fields. The status of an item for a team will determine what fields they have rights to edit.
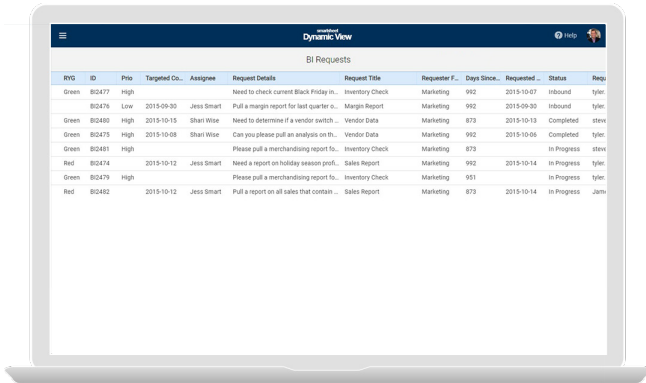
BI Request

A typical intake or request driven process. This requires the ability to provide the requester a view into the status of their "tickets", provide additional inputs for missing items, and provide the user a way to get the results of the requests (attachments and comments).

Mergers & Acquisitions

Managing time sensitive and confidential data is a hallmark of M&A program management. Dynamic View provides the unique combination of confidentiality and collaboration needed to manage target deal evaluation data, pre-deal and due-diligence processes, and the overall information related to integrations management.
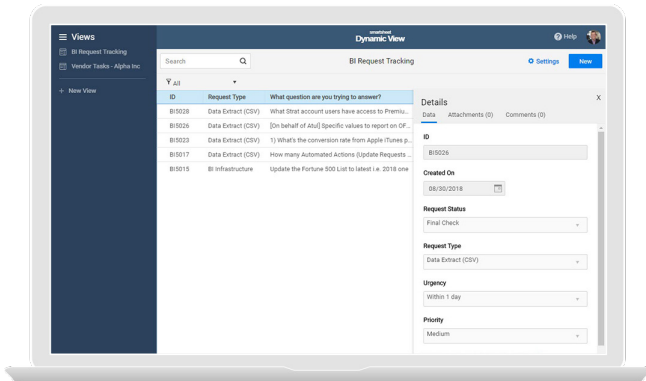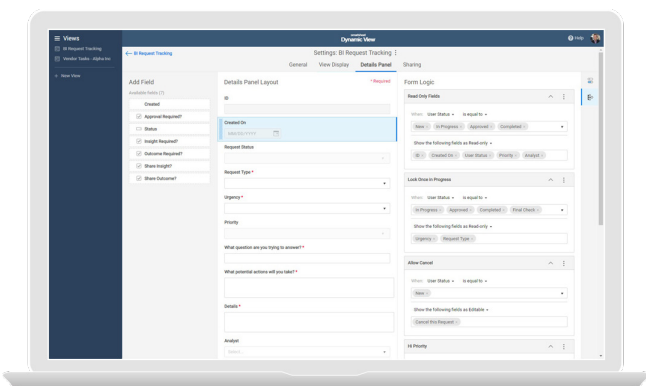
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Process View

Dynamic View contains a comprehensive listing of unique task assignments. It is used to manage work management requests, task or data updates, approval processes, and task completion status.

Creating and Editing Process View

Easy form setup for creating and editing process views. With Dynamic View, users can create and edit forms for identifying key fields, and setting up conditional view filters. Additionally, use the form setup to establish permissions for accessing, viewing and or editing the information based on the user's profile.

Flexible field, comments, and attachment configuration that improves process and permissions. From this screen, users can easily select key fields for viewing and whether or not comments are displayed, as well as to manage user access to editing comments. Additionally, users can manage the ability to view attachments and provide permissions for users to add attachments based on their user profile.