FAQ

smartsheet

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How does Status View work?

Status View recognizes a user's identity based on their Smartsheet login credentials or email address. It uses their identity to only display information assigned to them. Status View administrators choose which column Status View uses to determine what user a row is assigned to.

Can I create a Status View board using a report?

Yes! Status View supports both sheets and reports. Simply select a report, rather than a sheet, on the first pane of the Status View configuration wizard.

Can I create multiple Status View boards for one sheet?

Yes. Because you select what column Status View uses to determine which rows to display, you can create a Status View board for multiple user groups. For example, you can create separate Status Views for end users and their managers. To create multiple views, create a column for user name and email, and a separate column for manager name and email in your underlying sheet. Populate the new columns with email information, and then create two Status View boards using the user column as the name and email field on one board and your manager column on the other.

Can I notify users when the status of their requests change?

You have access to all of the notification features that you do on your underlying sheet. Status View does not offer additional notification functionality; however, you can accomplish row level event notifications with the help of Smartsheet partner products like Azuqua.

Who do I contact if I need help?

Contact us at support@smartsheet.com.

How do I create a Status View?

Use the blue 'Add New' displayed on the Status View homepage to create Status View boards. You need to prepare the following three objects in Smartsheet before creating a Status View board:

Web Form: Status View supports user-created records (i.e. tickets or requests) gathered from Smartsheet web forms. Each Status View board includes a link to the associated web-form. To create a web form, open the sheet with the data that you want Status View to display, click the Web Forms tab at the bottom of the sheet, and click Create New Form. You need a web-form URL to create a Status View board.

Name / Email Column: Status View uses the email or Smartsheet login credentials of the user to identify which records (i.e. tickets or requests) to show them. During configuration, you will specify which column contains those credentials. You may choose a Contact, System Generated (e.g. Created by) Text/Number, or Dropdown List column.

Status Column: Status View features two collapsible sections labeled Open and Closed. Status View organizes records (i.e. tickets or requests) based on the contents of a Status column. During configuration you will specify what records Status View considers Open and Closed. For example, you may decide that all closed or backlogged IT tickets should be displayed in the Closed section, while received, assigned to, or in-progress tickets are Open. However, you aren't limited to those options. You can assign most column types to the Status column.

How do I share Status View?

You can share Status View to individuals or domains. Use the sharing field in the configuration wizard to set up sharing. For example, let's say you want to share your Status View board with John.Doe@alphacorp.com. You can either share with John directly or with the alphacorp domain. To share a board with multiple individuals, insert their email addresses into the sharing field (separated by a comma). To share with everyone at a domain (e.g. anyone with an alphacorp.com email address) insert the domain (alphacorp.com) into the sharing field. If you choose to share with a domain, anyone at the company will have access to your Status View board, but they will only be shown records (i.e. tickets or requests) that they are assigned to (in the name/email column). If they are not assigned to any records, they will not see any information.