



ENGAGE

# Legal

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

# Seamless Collaboration While Working with Sensitive Data

Gaining Strategies for Data Protection: Knowing  
What Works, Where, and When



smartsheet

ENGAGE

v.07/16

# Speakers



**Joe Goetschel**

Smartsheet Director



**Cicero**

Director Product Marketing



# Key Takeaways

What You Should Take Away from This

1

What tools to use when sharing view-only data

2

What tools to use when collaboration is needed

3

Different use cases for these tools



**“ I shared the report with  
( X ) and they said  
**It’s blank...**  
I’m so embarrassed!! ”**

# 01

## User Story

Notes - The private ones



**Why was it blank?**





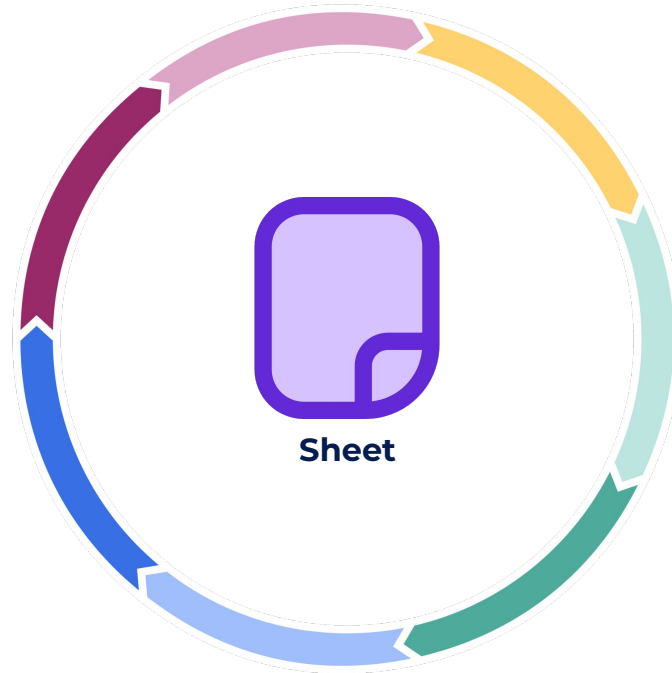
# Everything lives on a sheet

Reports

Dashboards

Forms

WorkAPPS



Dynamic Views

Calendar APP

Grid, Gantt, Calendar,  
Timeline, Board views

# Finding Solutions Solving Problems

## Problem

collaborate with data that shouldn't be fully viewable but also partly editable.





# Ways to share data

	Reports Only	Sheets + Report	Dashboards Only	WorkApps	Dynamic View
View all data	✗	✓	✓	⚡	✓
Collaborate with all data	✗	✓	✗	⚡	✓
"Save as new"	✓	✓	⚡	✗	✗
View only their data	✗	✗	⚡	⚡	✓
Collaborate with only their data	✗	✗	✗	✗	✓
Comment and add attachments	✗	✓	✗	✓	✓
Guided with logic on what data is required	✗	✗	✗	✗	✓

# Risks when sharing data

	Reports Only	Sheets + Report	Dashboards Only	WorkApps	Dynamic View
View all data	⊗	⚠	⚠	⚠	✓
Collaborate with all data	⊗	⚠	⊗	⚠	✓
"Save as new"	✓	⚠	⚠	⊗	⊗
View only their data	⊗	⊗	⚠	⚠	✓
Collaborate with only their data	⊗	⊗	⊗	⊗	✓
Comment and add attachments	⊗	⚠	⊗	⚠	✓
Guided with logic on what data is required	⊗	⊗	⊗	⊗	✓

2

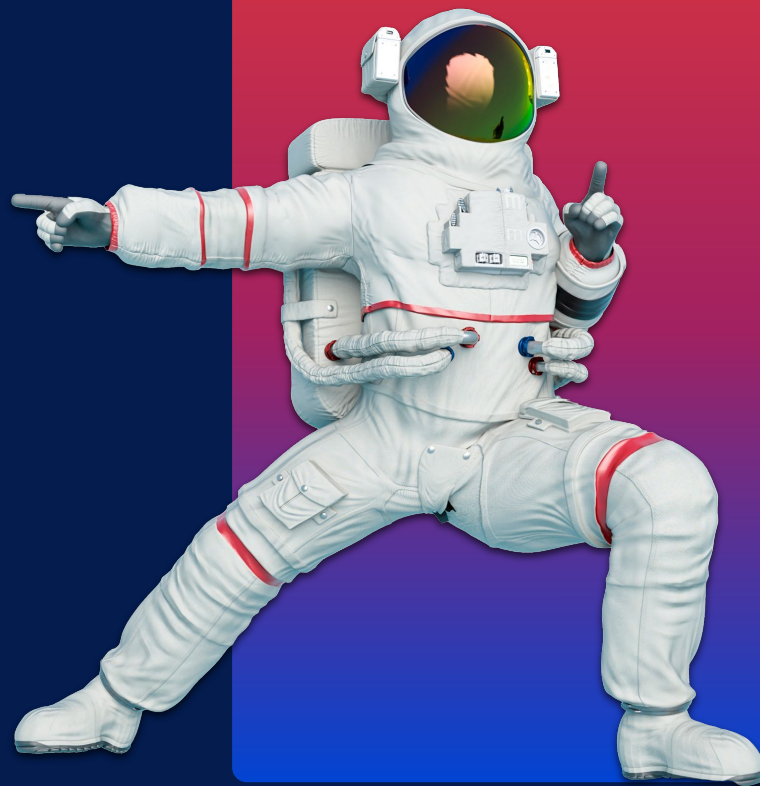
## Demo

The Solution

smartsheet  
ENGAGE

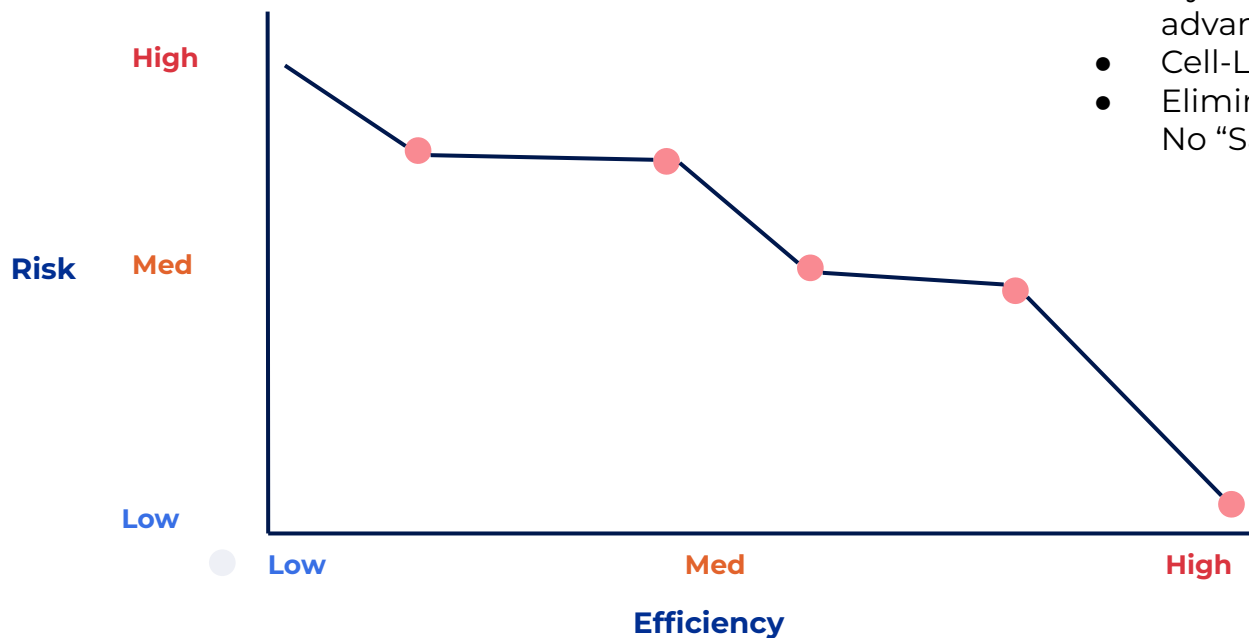
# Results

What problems did we solved?



# Measurable Impact

Dynamic View is your Swiss Army knife for data security



- Simplified Management (\$\$)
- Secure Collaboration Inside and Out
- Dynamic Data Protection using advanced logic
- Cell-Level Data Locking
- Eliminate Data Copy Risks— No “Save as New” Option



# Recap

## Key Highlights and Takeaways



**When to use  
Dynamic View**



**Why Dynamic View  
and not Reports**



**Solutions using  
Dynamic View**

# Next steps...

- Stop over to the SCS Cloud Booth
- Check out “Automate and manage your multi-step processes with Dynamic View”

## Take the survey

We'd love to hear your thoughts on the session.

**Open this session in the mobile app, click “Survey,”  
and answer two questions — it's that easy!**

# Thank you.

 smartsheet

# ENGAGE

Register for upcoming User Groups



Continue to expand your Smartsheet skills and connections by attending a **User Group**.

### Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

# Share your experience at ENGAGE

by participating in the conversation on social media!  
Use **#SmartsheetENGAGE** and tag Smartsheet  
in your posts all week long.



@smartsheet



@smartsheetplatform



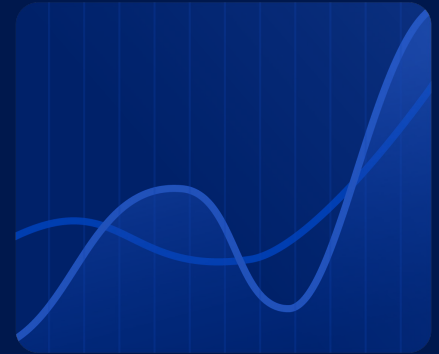
@smartsheet



@smartsheet



@smartsheet



 smartsheet

# ENGAGE