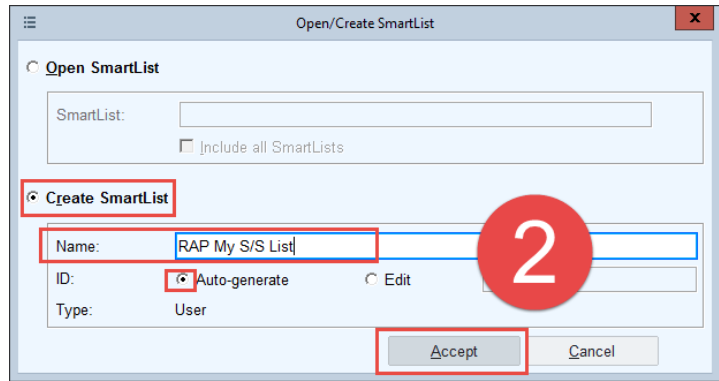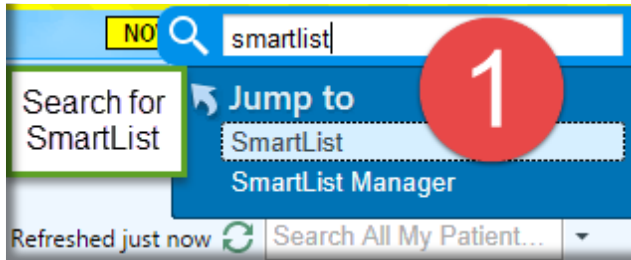# Dimensions Acute

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Tips & Tricks

Provider Creating User SmartLists

Providers may create and edit their own User SmartLists or share their SmartLists with other users. User SmartLists must be used in User SmartPhrases. Build your list, then create a SmartPhrase to hold your list.
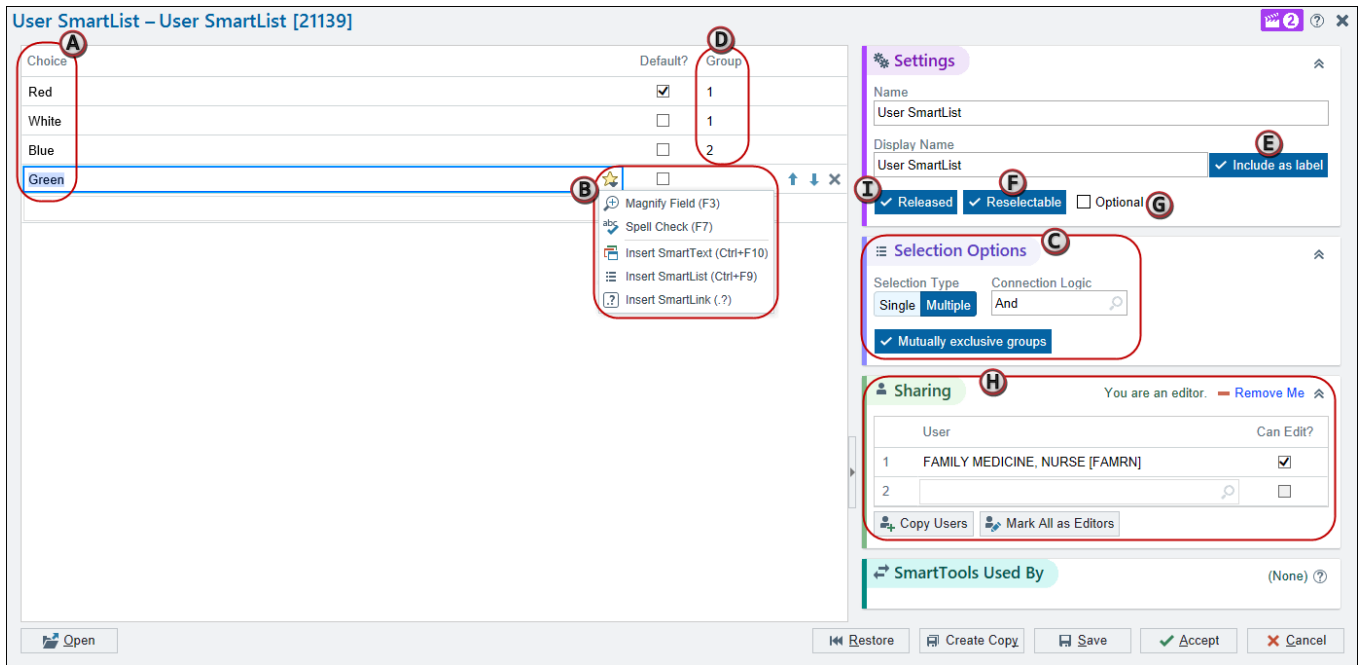
Create a User SmartList

1. Use Chart Search for "SmartList" to open the SmartList Editor and select **Create SmartList**.
2. Enter a name for the SmartList. The ID should be Auto-generated.

3. When you click Accept , the SmartList Editor opens where you define your SmartList and indicate with whom it should be shared.
4. In the **Choice** table, enter the choices in the SmartList (A). Select the check box next to an option to mark it as the default option.
5. To add another SmartTool (SmartText, SmartList, or SmartLink) to a choice in the SmartList, click the ⭐ and select one of the options (B):

   - ▪ 🗔 **Insert SmartText**
   - ▪ ☰ **Insert SmartList**
   - ▪ ❓ **Insert SmartLink**

6. If you want to be able to select more than one option in the SmartList, select the **Multiple Select** option (C).
7. In the **Connection Logic** section, specify how the selections appear in the SmartLink's generated text. For example, And logic would produce "Red, White, Blue, and Green" if all options in this SmartList were selected. Hover over each option for a description.
8. If the SmartList includes choices that shouldn't be selected together (for example, "Red and White" can be selected together but "Red and Blue" can't):

   a. Select the **Mutually exclusive groups** button.
   b. In the **Group** column (D), enter the group to which the selection belongs. If a selection has a group specified, it can only be selected by itself, with another option from the same group, or with an option that has a blank group name.

9. If you want to show a label in the generated text (for example, "Color: Red and White"), enter Yes in the **Label?** field (E) and enter the display text in the **Label text** field.

Provider Creating User SmartLists
For more tips and tricks sheets, go to the Dimensions Acute site on I-Connect > Dimensions Acute > References > Tips and Tricks

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10. The **Reselectable** button (F) is selected by default, which allows you to re-select your options when using the SmartList. Unselect this checkbox if you do not want to be able to re-select options.
11. To make the SmartList optional, meaning that you don't have to complete it before saving the text that contains it, select the **Optional?** check box (G).
12. When you're done editing your SmartList, click ✔**Accept** to save your SmartList and exit the SmartList editor.

Let Others Use Your SmartList

1. In the **Sharing** section (H), list the users who can use the SmartList in the **User** column.
2. Select the **Can Edit?** check box to allow a user to modify your SmartList.

Copy Users from a SmartPhrase or SmartList

If a SmartPhrase or SmartList has a list of users (and their editing rights) you wish to use again:

1. Click 👥 **Copy Users**.
2. Toggle the **Search on** option to search for a SmartList or a SmartPhrase.

Select a SmartPhrase or SmartList. Its users appear in the **Users to Copy** section. Users who can edit the selected SmartPhrase or SmartList have a ✔ check mark icon next to their name.

Good to know:

User SmartLists can be used in User SmartPhrases only. The user creating the User SmartPhrase must have access (either user or owner) to the User SmartList. If a user has access to a User SmartPhhrase that contains a User SmartList for which they're not listed as a user, they can still access the User SmartList through the SmartPhrase.

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Copy a System SmartList to Create a User SmartList

A User SmartList can be created from a System SmartList from your SmartList Editor.

1. Click on the SmartList tab to open a search for an existing SmartList.

2. Once you have Accepted the SmartList of choice

3. Create Copy

4. Name your copy of the system SmartList

Note: Some features in the System SmartList aren't supported in User SmartLists, such as discrete data (SmartData Elements).

Provider Creating User SmartLists

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