INTRODUCTION TO SMARTSHEET

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PRE CHECKLIST

Plan what you will need to set up the Project. Some questions to consider

- ✓ What do I want to manage?
  - ✓ Task list only? Budgets? Stakeholder Contacts? Risks? Issue logs?
- ✓ What types of reports do I want?
- ✓ Which workflows would I like to automate?
- ✓ What types of reminders would I like to send ?
- ✓ What are potential pain points?
- ✓ How can I simplify pain points?
- ✓ Begin by setting up the workspace in Smartsheet and then create sheets
- ✓ Think about what you want to measure, the repetitive tasks that need updating

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SMARTSHEET: THE SHEET AS THE FOUNDATION

- The sheet is the foundation of all Smartsheet data. Users can import data from Excel, Google Sheets, MS Project and Atlassian Trello or create a new one using an existing template, a template set or blank sheet.

- On a sheet, users can
  - Set column tasks and properties
  - Add Comments
  - Add Attachments
  - Send update Requests
  - View Cell History
  - Share Entire sheets or select rows and columns
  - Proof documents
  - Publish links
  - View Activity Log
  - Set Sheet Summary
  - And much more…

SMARTSHEET: VIEWS

- Switch to different views based on the preference. Four views are available
  - Grid: Data is displayed in a spreadsheet format
  - Gantt: Data is displayed in a spreadsheet format on the left and a Gantt chart on the right
  - Calendar: Data is displayed in a calendar form, driven by project dates
  - Card: Data is shown in a card format, Kanban style

SMARTSHEET:FILTERS

- Filters can be created to view specific components of the project.
  - So, for example, you can create filters
    - To show all tasks under the Schedule Health Column in Red
    - For tasks assigned to an individuals
    - Tasks due in the next xxx days etc.

- Filters can be turned off and on the menu.
- Users can navigate between multiple filters

SMARTSHEET: CONDITIONAL FORMATTING

- Visual displays can be set through Conditional Formatting rules
- For example, color formatting can be applied based on
  - Status
  - Dates that are greater or less than the due date
  - Priority

  - To name a few…

SMARTSHEET:FORMS

- Create Forms for intakes, surveys, feedback
  - Data will display within the sheet when a user completes a form (Create from the Solution Center or import data)
  - Use conditional logic to display select columns
  - Adjust column properties to require data
  - Share the link with customers or other clients
  - Use it for tracking user access requests, reviews, PTO requests and so much more

SMARTSHEET: ALERTS AND REMINDERS

Easily set alerts and reminders and automate your workflows

- Alerts are generally reactive and can be used to trigger some actions
- Reminders are proactive and can be used to remind a user or users of actions they need to take
- Manage and edit all workflows from a central location under "Manage Workflows"
- Use alerts and reminders for due dates, approval request, update requests.
- Use in conjunction with conditional formatting

SMARTSHEET: USING FORMULAS

- Smartsheet uses formulas, like Excel. Enter = in the cell to use a formula. Some of the formulas are very familiar to users, while others are unique to Smartsheet. Click Reference to get access to the formulas and helpful tips
- Formulas can also be applied to retrieve data from other sheets
- Use formulas to calculate data or apply advanced rules for formatting cells. Example, a Nested IFF formula can be used to change the color of the Status based on multiple criteria such as percentage complete
- Smartsheet utilizes formulas to aggregate data on hierarchical information such as child rows. This calculation can be useful when counting issues under a Priority level (as an example) or summing budgets by Phases

SMARTSHEET: REPORTS/DASHBOARDS

- Create Reports from existing data, using summary or row data
- Summarize and group information
- Visually display key information on a dashboard.
  - Add charts, shortcuts and rich texts

Questions