SBCUSD
IT Applications Training & Support

Smartsheet
Project Development, Management, & Collaboration
for Licensed Project Managers

Revised – 7/7/2021
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SmartSheet Support

SMARTSHEET RESOURCE CENTER - SMARTSHEET VIDEOS

Information Technology Training Team - TECHTRAINING@SBSCUSD.COM
**SMARTSHEET ACCOUNTS — WHO’S WHO**

**PAID FOR LICENSED ACCOUNT — PROJECT MANAGERS AND PROJECT DEVELOPERS**
District Directors, Assistant Directors, Managers, Supervisors and the like, can purchase a Smartsheet license in order to create, develop, build, and manage Smartsheets/Smartsheet Projects. This would also allow them to invite free Smartsheet account holders to edit basic content in a sheet/project.

**FREE ACCOUNT — PROJECT TEAM MEMBERS/RESPONDERS**
Any District team member can create a free Smartsheet account at Smartsheet.com. This would make them available to respond to licensed Smartsheet project manager sheets. They could be shared to a sheet in order to login to the sheet and make basic changes and or respond to Smartsheet Update Requests.

**NOTE:** Smartsheet licensed accounts are acquired by the District in packs of 3. The Purchasing Department will open a purchase requisition and follow up on your acquiring of an account.
LOGGING IN

1. Point a web browser to WWW.SMARTSHEET.COM
2. Click on the Log In button
3. Enter your username
4. Example: FIRSTNAME.LASTNAME@SBCUSD.COM
5. Enter your password

NOTE – Licenses ($300 annual), are procured by the purchasing department. Once you are licensed with Smartsheet, you will receive an email in your District inbox instructing you to log in with a temporary password. At that time, you can set your password as you wish.

NOTE – Licensed users/project managers can create project sheets, and maintain full administrative permissions to those projects. Colleagues who are given edit permissions through the sheet sharing feature do not need to purchase a license. Project editors will be invited to edit projects sheets and can create a Smartsheet account for free.
GETTING STARTED

The primary project development feature in Smartsheet are the columns you develop in the sheet. Together adding needed columns and defining their type is what creates the project type and the project management approach. With this, Smartsheet is heavily loaded with templates that cover a wide variety in project types and project management approaches.

CREATE SHEET/PROJECT FROM TEMPLATE
1. Click on the Folder button in the left navigation bar
2. Click on the Create button in the upper right
3. Click on Browse Templates
4. Click on Browse All Solutions at the left
5. Click on the Template Category
6. Select from a number of Templates
7. Click on the Use button
8. In the list of sheets, click on the sheet/template you created
9. Edit the sheet as need be

CREATE BLANK SHEET/PROJECT
1. Click on the Folder button in the left navigation bar
2. Click on the Create button in the upper right, and Click on Grid
3. Name your sheet and click on OK

NOTE: You may create your own template by clicking on the File Menu from within your sheet selecting Save As Template...
Building your project is much like building a spreadsheet. The rows will become the project tasks you track. The columns will become the criteria you track and measure for each task, as well as criteria that can be utilized to trigger automated work flow.

### Default System Columns

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachments</td>
<td>Make files available which are related to this task/row</td>
</tr>
<tr>
<td>Comments</td>
<td>Create and manage comment threads related to this task/row</td>
</tr>
<tr>
<td>Proofs</td>
<td>Review and approve attached file images, videos, PDFs, and Microsoft Office documents, get feedback, and get approvals from stakeholders</td>
</tr>
<tr>
<td>Row Action Indicators</td>
<td>Set reminders to trigger which are related to this task/row, create update requests</td>
</tr>
<tr>
<td>Primary Column</td>
<td>Contains Key/Unique project information, its type cannot be changed or removed</td>
</tr>
</tbody>
</table>

### Project Column Types and Definitions

<table>
<thead>
<tr>
<th>Column Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text/Number</td>
<td>Default column type, general text, or numbers</td>
</tr>
<tr>
<td>Contact List…</td>
<td>Dropdown List, specifically user contact information</td>
</tr>
<tr>
<td>Date</td>
<td>Date content</td>
</tr>
<tr>
<td>Dropdown</td>
<td>List of multiple choices you define, single select or multiple select</td>
</tr>
<tr>
<td>Check Box</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Symbols…</td>
<td>Predefined set of symbols to create status or progress information</td>
</tr>
<tr>
<td>Auto-Number/System</td>
<td>Auto generate a unique ID or item number</td>
</tr>
</tbody>
</table>

[Related Videos]

**Creating and Defining Columns**
CREATING COMMON CORE SHEET COLUMNS

COLUMN TYPES

1. **Double-click** on the column headings and choose Edit Column Properties

CORE TASK PROJECT COLUMNS IN ORDER

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Type and Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Tasks</td>
<td>Primary Column – Key Task Title/Information being tracked</td>
</tr>
<tr>
<td>Priority</td>
<td>Dropdown List - Low, Medium, High</td>
</tr>
<tr>
<td>Status</td>
<td>Dropdown List - Not Started, At Risk, In Progress, Ready for Review</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Contact List – Assign task to this person(s)/contact(s)</td>
</tr>
<tr>
<td>Start Date</td>
<td>Date – Create start dates for tasks</td>
</tr>
<tr>
<td>Due Date</td>
<td>Date – Create due dates for the tasks</td>
</tr>
<tr>
<td>Approval</td>
<td>Dropdown List - Submitted, Approved, Declined</td>
</tr>
<tr>
<td>Completed</td>
<td>Check Box – Yes, No checkmark</td>
</tr>
</tbody>
</table>

RENAME COLUMNS

1. **Right-click** on the column heading and choose rename

ADD COLUMNS

1. **Right-click** on a column heading next to where you wish to place a new column

2. Choose Insert Column Left or Insert Column Right

MOVE COLUMNS

1. **Click and Drag** columns headings horizontally across the sheet and drop them in the desired location
Rows are a key element in your sheet and can contain project criteria, like project task names, order information, due dates, task status and much more. Rows can also include additional project information, like file attachments and comments.

1. **Enter task names/ phosphates in Task Name column** for each task you need to track in the project
   Grouping related tasks together in contiguous rows will help you work with them and track them later.

2. **Right-click in a task row** which is the first row per a related group of task and **choose Insert Row**

3. **Enter a task group name** above the related task groups

4. Repeat these steps until you have entered all projects tasks and task group rows

5. Enter and set data in each cell along each row

   **NOTE** – You can use AutoFill Down in Smartsheet as you would in Excel.

### Indenting Rows

Rather than facing hundreds of rows in one project, you easily condense your data so you can focus on a related set or group of tasks.

1. Highlight a related set of task rows (**hold shift and click** on the **first row** and the **last row** in the range)

2. **Click** on the **Indent** button in the toolbar above
   Parent rows can be collapsed or expanded, helping you to concentrate on certain parts or your projects at one time.

   **NOTE** – You can create as many child relationships as you wish by further indenting rows.

### Save and Refresh

1. To save your sheet, **click** on the **Save** button in the toolbar above

2. To refresh your sheet, **click** on the **File** menu and choose **Refresh**
## COLUMN AND ROW MENUS

### COLUMN MENU

All columns maintain a number of features which are available in the Column Menu in the column heading.

1. **Point** to a *column heading*, and **click** on the **Column Menu** (triple dot icon)
2. Select from a number of common column functions and features

<table>
<thead>
<tr>
<th>Notable Column Menu Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert Column</td>
</tr>
<tr>
<td>Lock Column</td>
</tr>
<tr>
<td>Freeze Column</td>
</tr>
<tr>
<td>Column Properties</td>
</tr>
</tbody>
</table>

### ROW MENU

All rows maintain a number of features which are available in the Row Menu immediately right of the row number.

1. **Point** to a *row number*, and **click** on the **Row Menu** (triple Dot) icon
2. Select from a number of common row functions and features

<table>
<thead>
<tr>
<th>Notable Row Menu Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert Row</td>
</tr>
<tr>
<td>Edit</td>
</tr>
<tr>
<td>Lock Row</td>
</tr>
<tr>
<td>Send Update Request</td>
</tr>
</tbody>
</table>
**SHARING SHEETS**

Invite others to collaborate or edit and change sheet content. Sharing a sheet with someone enables them to log in to Smartsheet and access the sheet based on the permission level you assign them.

**INVITE COLLABORATORS**

1. **Click** on the Share button in the upper right of your sheet

2. In the Invite Collaborators field **type** the email addresses of organization members, and or outside peoples or vendors, and or group names (if groups have been created by the group administrator)

   OR

3. **Click** on the Select Contacts button to select organization members and any other contacts or contact groups which you have added to your account

   **NOTE** – You can create a contacts list from within your account menu in the lower left.

4. Use the Permissions Dropdown List to **assign** appropriate sheet permissions to the invitees

   **NOTE** – You can return to this share window anytime to remove members or edit their permission levels.

**SHARING PERMISSIONS**

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewer</td>
<td>No license needed, can view all information in sheet, cannot modify any sheet data</td>
</tr>
<tr>
<td>Editor – cannot share</td>
<td>No license needed, can edit sheet data, enter and edit comments, add files, they cannot modify the column layout, cannot add shares</td>
</tr>
<tr>
<td>Editor – can share</td>
<td>No license needed, can edit sheet data, enter and edit comments, add files, can share the sheet, they cannot modify the column layout</td>
</tr>
<tr>
<td>Admin</td>
<td>Must be licensed user, can edit sheet data, enter and edit comments, add files, modify columns, add/manage shares and permissions</td>
</tr>
</tbody>
</table>

5. **Click** on Invite Details and enter a **subject line** explaining what’s being shared

6. **Click** on the Share Sheet button

   **NOTE** – The recipient of the sharing invite will receive an email with a link to the sheet. If they have an account, they can view it immediately. If the recipient does not have an account, they will be prompted to create an account at no charge. See this document’s final page, Send This to First Time Assignees and or Sheet Invitees in order to properly inform first time Smartsheet users of basic Smartsheet use.

   **NOTE** – Your Assigned To team member(s) would most probably maintain share permissions at edit level. Remember the Lock Columns and or Rows feature once you have shared your sheet with others.
FILE SHARING

ROW ATTACHMENTS
You can attach a file that is directly related to a row by using the row attachment feature.

1. **Click** on the **Attachments** icon in the row you wish to attach a file to
2. In the Attachments window **click** on the **Attach Files** button
3. Select from the various web file sharing platforms or choose to upload a file via your computer
4. Browse to the file on your computer and **click** on Open
   OR
5. Log into the selected web file sharing platform, **click** on **Allow**, **select** the file and, **click** on the **Select** button

NOTE – Uploaded files from the supported web file sharing platforms will always maintain the latest version of the file when it is edited within the supported platform.

SHEET ATTACHMENTS
1. Click on the **Attachments** button at the right of the sheet
2. In the Attachments window **click** on the **Attach Files** button
3. Select from the various web file sharing platforms or choose to upload a file via your computer
4. Browse to the file on your computer and **click** on **Open**
   OR
5. Log into the selected web file sharing platform, **click** on **Allow**, **select** the file and, **click** on the **Select** button
CONVERSATIONS/COMMENTS

Using comments in your sheet, creates an archive of relevant notes, links, and files that collaborators can access, modify, and reply to at any time. Comments with their links and attachments is an excellent way to coordinate efforts.

ROW COMMENTS
1. Click on the Comments button in the row you wish to create a comment for
2. In the Comments window enter a comment
3. Click on the Add attachment button to add an attachment or web link to this comment or comment thread (optional)

SHEET COMMENTS
1. Click on the Comments button at the right of your sheet
2. In the Comments window enter a comment
3. Click on the Add attachment button to add an attachment or web link to this comment or comment thread (optional)

NOTE – You can Tag People in Comments with an @, this will notify them of the comment. If they’re shared to the sheet, they’ll receive a notification that includes a link to the comment so they can quickly find it and respond.

COMMENT ATTACHMENTS
You can attach a file that is directly related to a comment by using the comment attachment feature.

1. Click on the Comments button in the row you wish attach a file to
2. In the Comments window click on the Attach icon
3. Select from the various web file sharing platforms or choose to upload a file via your computer
4. Browse to the file on your computer and click on Open
   OR
5. Log into the selected web file sharing platform, click on Allow, select the file and, click on the Select button

NOTE – All team members this sheet has been shared will receive a notification (upper left notification feature) of sheet or row comments. If they maintain edit level share permissions, they can then reply, attach supporting files, and add web links to the comment thread.
**Track Sheet Activity**

**Highlight Cells Changes**
1. Click on the Highlight Changes button in the button bar above
2. In the Highlight Cells window click the ON/OFF toggle to turn the feature on
3. In the Highlight changes in the last: Dropdown List, choose a time frame for which cells have changed

**Cell History**
1. Right-click on any cell and choose View Cell History
   You can view who changed the cell, when the cell was change and what was changed.

**View Activity Log**
The Activity Log gives sheet owners, admins, and editors one place to see who has viewed a sheet, what changes were made, and when those activities occurred.
1. Click on the Activity Log button at the right of the sheet
2. Click on the Filters Dropdown arrow, and select sheet actions to filter the activities by action types
3. Select a date range for your filters in order to narrow you filter down to a known time frame

**Related Videos**
Track and View Sheet Activity

**NOTE** – Sheet Owners see all sheet activities since the sheet was created. Admins and Editors see all sheet activity since they were shared to the sheet.
Conditional formatting can change the look of cells in your sheet when they meet certain conditions.

1. To create conditional formatting rules, **click** on the **Conditional Formatting** button in the toolbar above.

2. In the Conditional Formatting window, **click** on the **Add New Rule** button.

3. A new rule will appear in the window below.

### Conditional Formatting

<table>
<thead>
<tr>
<th><code>&lt;set condition&gt;</code></th>
<th>Select a column you wish to track value changes in, excellent for looking after the Priority column in combination with the Due Date Column.</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>this format</code></td>
<td>Select from various font schemas, colors, as well as row color to visually alert you to condition change that are met.</td>
</tr>
<tr>
<td><code>entire row</code></td>
<td>Leave at entire row or select which columns cells in the row will receive the formats when the condition is met.</td>
</tr>
</tbody>
</table>

**NOTE:** Per the formatting, use Taskbar to apply formats to Calendar View and Card View. In order for this to work, you will need to apply the format to the entire row.

**NOTE** – You can set as many conditions as you wish when creating a rule. To do so, click on the dropdown arrow at the left of the rule and choose **Add Condition (AND)**.
The Set a Reminder feature will automatically send a reminder in regards to task dates.

1. Point to a row number, and click on the Row Menu (triple Dot) icon for the row you wish to set a reminder for

2. Choose Set Reminder...

3. Select who will receive the reminder

4. Select a date the reminder will arrive

5. Click on OK

Message: test

<table>
<thead>
<tr>
<th>Flagged</th>
<th>Project Tasks</th>
<th>Priority</th>
<th>Status</th>
<th>Assigned To</th>
<th>Start Date</th>
<th>Due Date</th>
<th>Duration</th>
<th>Predecessor</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identify Key Software Features</td>
<td>!</td>
<td>Not Started</td>
<td>Whitney Hengesbach</td>
<td>02/28/18</td>
<td>03/01/18</td>
<td>2d</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please do not reply to this mail. For support or questions, please contact us at www.smartsheet.com/help.
The Alert Someone feature will automatically alert you or a team member when particular sheet conditions exist.

1. Click on the Automation menu above the sheet and choose Alert Someone...

2. In the top of the window, enter a unique Workflow Name for this new workflow

3. In the Trigger Dropdown List, choose a trigger condition

4. Select when the workflow will be triggered

5. Select who will be alerted

6. Click on Save
Alert Someone Workflow

Alert - Row Assigned to You

When a row is added
Notify Assigned To right away

The task assignee will receive an email alert.

Assignee can login and further review task information and make updates as they wish.
**AUTOMATED WORKFLOW - AUTOMATED UPDATE REQUESTS**

The Send an Update Request feature will **automatically request updates on specific rows**.

1. **Click** on the Automation menu above the sheet and choose Request and Update...

2. In the top of the window, **enter a unique Workflow Name** for this new workflow.

3. In the Trigger Dropdown List, and choose a **When a date is reached**

4. For the **When** field, choose **Run once**

5. Choose **5 days before**

6. Choose **Date field**, and select **Due Date**

7. **Select when** the request will be sent

8. **Click** on Add a condition to add column field conditions (optional)

9. **Select who** will be alerted when the above conditions are met

10. **Click** on Customize message, and **Specific fields** to select which column data will be editable from within the update request

11. **Click** on Save
**EXAMPLE UPDATE REQUEST WORKFLOW**

**Update Request Alert Rule**

The task assignee will receive an update request email with a link to a form which contains these columns’ editable data displayed.

The assigned team member responds and changes field values in the form and hits submit. The sheet is updated with the changes.
Automated Workflow - Approval Requests

The Send Approval Request feature will automatically initiate a request for approval on tasks in the sheet.

1. Click on the Automation menu above the sheet and choose Set up an Approval Workflow...

2. In the top of the window, enter a unique Workflow Name for this new workflow.

3. In the Trigger Dropdown List, choose a When rows are changed.

4. For the When field, choose Status.

5. Select changes to Ready for Review.

6. Select when the request will be sent.

7. Select who will be alerted when the above conditions are met.

8. Under Save response in, choose Approval.

9. Click on Customize message, and Specific fields to select which column data will be editable from within the approval request.

10. Click on Save.
EXAMPLE APPROVAL REQUEST WORKFLOW

Approval Request Alert Rule

Whitney will receive a request approval email with a link to a form which contains these columns editable data displayed.

Whitney responds and changes field values, as well as approving the task or not in the form and hits submit.

The sheet is updated with the changes.
## Example Alerts and Actions and Example Workflows Setup

### Alerts & Actions

<table>
<thead>
<tr>
<th>Reminder</th>
<th>Send a reminder 5 days before Due Date for row 8</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>set by Whitney Hengesbach November 19, 2018 9:46 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alert</th>
<th>When a row is added</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Notify Assigned To right away</td>
</tr>
<tr>
<td></td>
<td>set by Whitney Hengesbach November 15, 2018 3:41 PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alert</th>
<th>When a row is added or changed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In any row where Due Date is in the next (days) 5</td>
</tr>
<tr>
<td></td>
<td>and Status is Not Started</td>
</tr>
<tr>
<td></td>
<td>and Priority is High</td>
</tr>
<tr>
<td></td>
<td>Notify Assigned To right away</td>
</tr>
<tr>
<td></td>
<td>set by Whitney Hengesbach November 19, 2018 9:44 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Update Request - Task Alert and Update</th>
<th>5 days before a date on Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In any row where Status is one of At Risk, In Progress, Not Started</td>
</tr>
<tr>
<td></td>
<td>and Priority is one of High, Medium</td>
</tr>
<tr>
<td>Send an update request to Assigned To</td>
<td>set by Whitney Hengesbach November 19, 2018 9:54 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Approval Request - Task Status Ready for Review</th>
<th>When a row is added or changed</th>
</tr>
</thead>
<tbody>
<tr>
<td>When Status changes to Ready for Review</td>
<td>Send an approval request to Whitney Hengesbach right away</td>
</tr>
<tr>
<td>set by Whitney Hengesbach October 12, 2018 12:00 PM</td>
<td></td>
</tr>
</tbody>
</table>
SEND THIS TO FIRST TIME ASSIGNEES AND OR SHEET INVITEES

NOTE - SHARE THIS DOCUMENT with Task Assignees and or Sheet Invitees before inviting or requesting an update if they have never been prompted to do any Smartsheet work previously.

WELCOME TO SMARTSHEET

Smartsheet is an application for project management and collaboration. It is used to assign tasks, track project progress, share documents, and manage other work. Even though you are not a Smartsheet Project Manager or Smartsheet account holder, you may be prompted by a Smartsheet Project Manager in the District to update information within a project sheet or be invited to edit the project sheet.

When a Smartsheet Project Admin invites you to edit a Smartsheet project sheet or they prompt you to update a project, you'll receive an email to either update the project (Update Request), or edit the project sheet (Invite to Edit Sheet).

Receiving an Update Request Looks Like This

Please look over this task and update the fields contained in this update request.

Open Update Form

Row 6
Priority —
Status Not Started

Receiving an Invite to Edit a Project Sheet Looks Like This

Whitney Hengesbach has invited you to edit the following sheet:

Project X Task Tracking

Open in Smartsheet

Click the button to accept your invitation and set your password.

Have you received a Smartsheet Update Request from a project manager? Simply click on the Open Update Form button in the email. You will see the Update Request form and can edit any of the fields it contains. The idea is that without having to see or access the actual project sheet, you can edit the available form fields in the Update Request and submit this information to the project sheet automatically. That's it, your done.

Have you been invited to edit and or share a project sheet in Smartsheet for the first time? Just click the link contained in the sharing notification you received to quickly create a Smartsheet account. You'll then be directed right to the sheet where you can edit various sheet information.

LEARN MORE AND GET STARTED WITH SMARTSHEET