SBCUSD
IT Applications Training & Support

smartsheet

Smartsheet
Project Collaboration
for Sheet Editors

SAN BERNARDINO CITY
UNIFIED SCHOOL DISTRICT
Making Hope Happen

Revised – 7/13/2021

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SmartSheet Support

SMARTSHEET RESOURCE CENTER, SMARTSHEET VIDEOS

Information Technology Training Team - TECHTRAINING@SBSCUSD.COM

Latest Revisions

SMARTSHEET ACCOUNTS – WHO'S WHO

PAID FOR LICENSED ACCOUNT – PROJECTS 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/SHEET EDITORS

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.

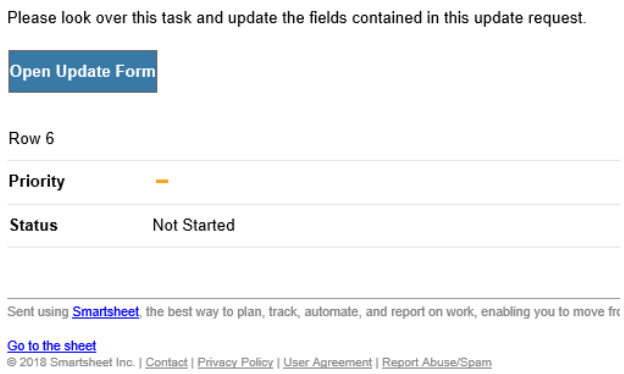
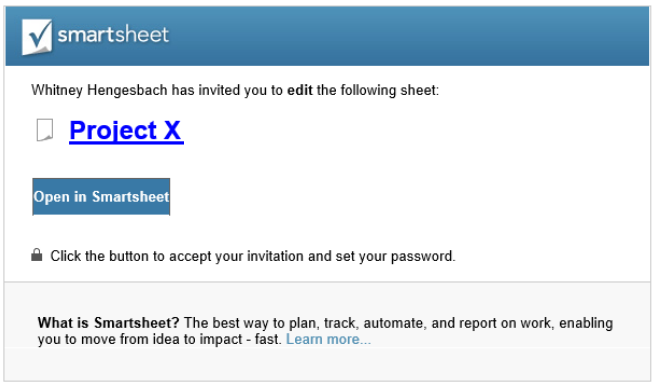
> ***NOTE**: Smartsheet licensed accounts are acquired by the District in packs of 3. The Purchasing Department will open a purchase requisition and follow up on your acquiring of an account.*

FIRST TIME ASSIGN TO AND OR SHEET INVITE

WELCOME TO SMARTSHEET

Smartsheet is a software as a service (SaaS) application for project management and collaboration. It is used to assign tasks, track project progress, as well as, 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 itself.

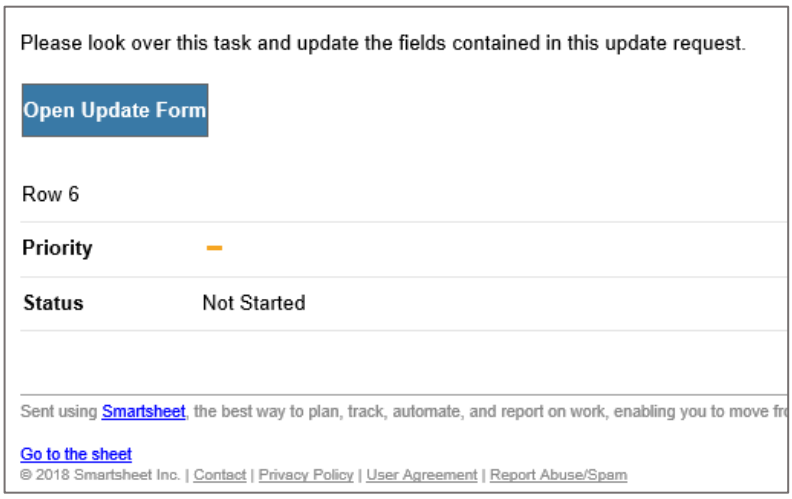
When a Smartsheet Project Admin invites you to edit a Smartsheet project sheet or they prompt you to update a project, you'll receive an email to either udpate the project (Update Request), or edit the project sheet (Invite to Edit Sheet).

Receiving an Update Request Looks Like This	**Receiving an Invite to Edit a Project Sheet Looks Like This**
	
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 acutal 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.

Responding to Update Requests

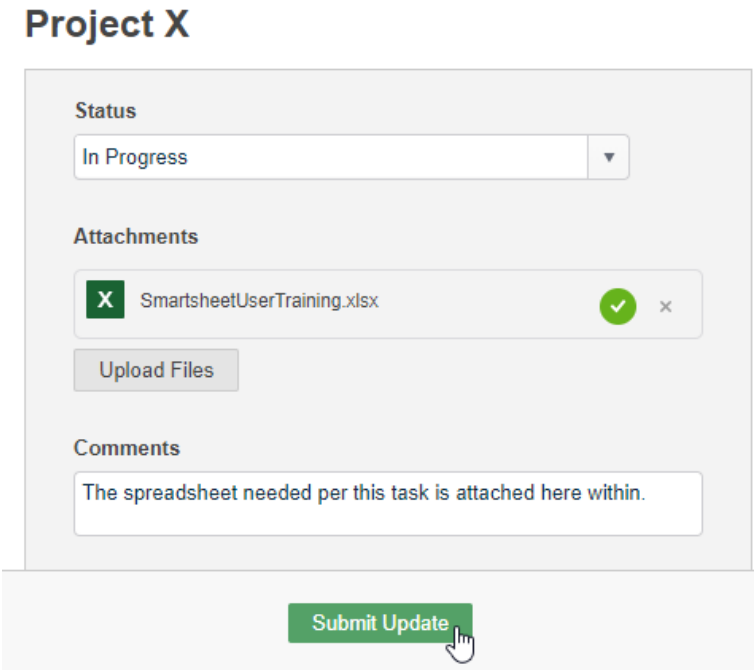
If and when a project manager prompts an Update Request per a particular row in the project sheet, you will receive an email in your District inbox.

1. Open the email and note the task/row name in the subject line
2. **Click** on the **Open Update Form** in the email you receive
3. A form will open in a web browser
4. Enter and upload all available information as it pertains to the task/row mentioned in the subject line of the email



5. **Click** on **Submit Update**

   The information you provide in the form will update into the project sheet, and you're done.



Receiving Sheet Invites

Accepting an Invite

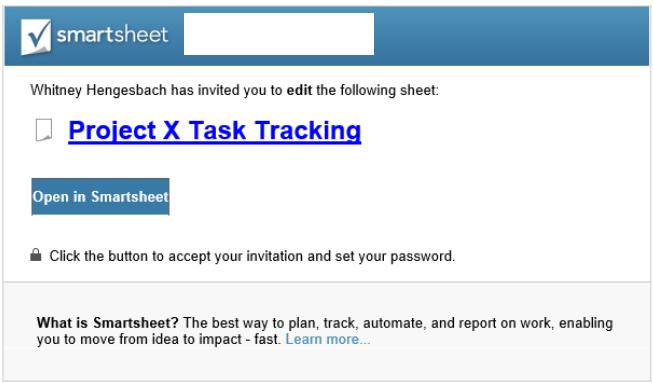
If you have been invited to edit a Smartsheet, you'll receive an email from Smartsheet.com.

1. **Click** on the **project name link** in the email

   A web browser will appear.

2. **Login to your Smartsheet account**

   first.last@sbcusd.com



Accepting your First Invite

1. **Click** on the **project name link** in the email

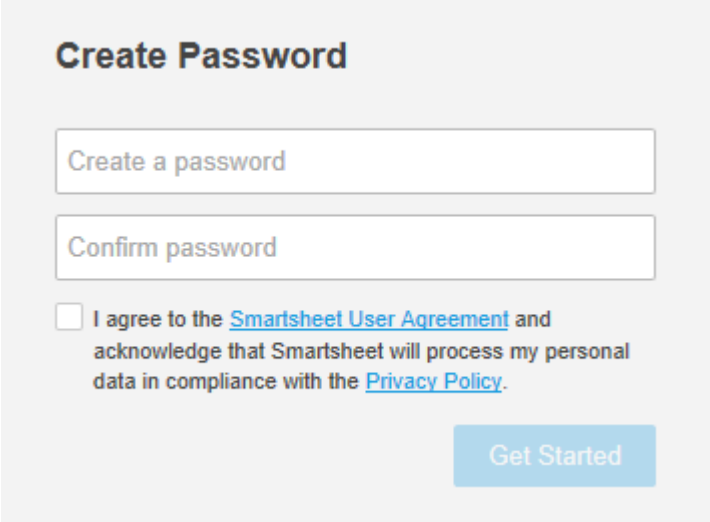
   A Web Browser will appear.

2. Create a **password**

3. Repeat the password

4. **Click** on **Agree**

5. **Click** on **Get Started**



***NOTE** – Your username will be firstname.lastname@sbcusd.com. Your password is unique to Smartsheet. It does not follow your District password.*

***NOTE** – You will now be able to edit and save changes to the project sheet.*

***NOTE** – Smartsheet account holders (not licensed project managers) can edit sheets, but cannot create project sheets.*

Alerts and Reminders

A Project manager may set automation rules in sheets which would alert sheet editors via an email to certain conditions which exist in the sheet. Typically, an alert would let you know a row/task has been assigned to you or that certain row conditions exist in a row that is assigned to you.

Responding to an Alert

1. In your inbox, **click** on the **link to the sheet** provided from within the alert email

2. Login to your account

3. Make any needed edits or additions to the row in question

4. **Click** on the **File** menu and choose **Save**

EDITING ROWS

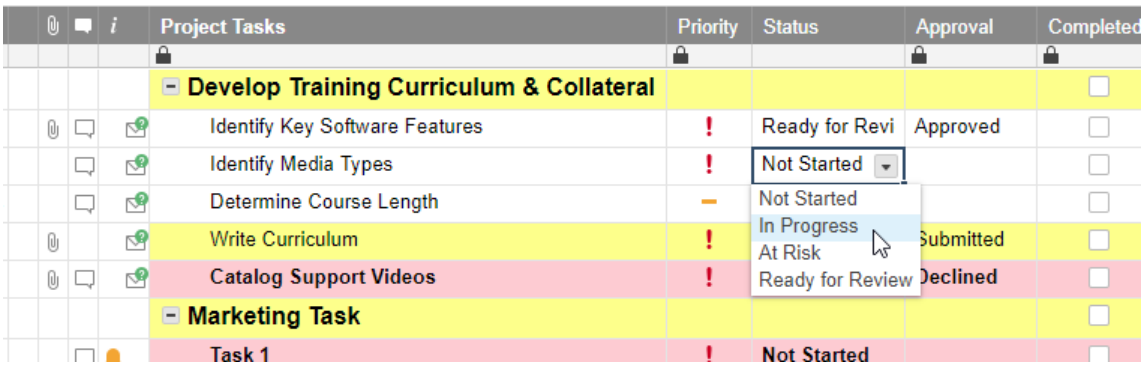
LOCATING SHEETS WHICH HAVE BEEN SHARED WITH YOU

1. After logging into Smartsheet, **Click** on the **Folder** button in the left navigation bar
2. In the main window, locate and **click** on the **sheet** you wish to edit

EDITING ROW/TASK CONTENT

1. **Click** in any **cell** in a row in order to edit the content of that cell

   Some cells by design allow you to freely enter material, others you will be restricted to an array of choices in a drop down list.



READY FOR REVIEW

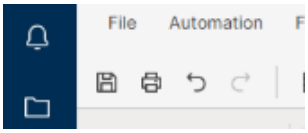
1. When you feel a task you've been assigned has been completed, **click** in the **Status column** per that row/task, and select **Ready for Review**

   The project manager will be alerted and respond to your request for review.

> ***NOTE*** *– You may not be able to edit all column criteria. The sheet owner can lock the columns he or she desires, so it is that non project managers (sheet editors) can only edit certain column data.*

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**



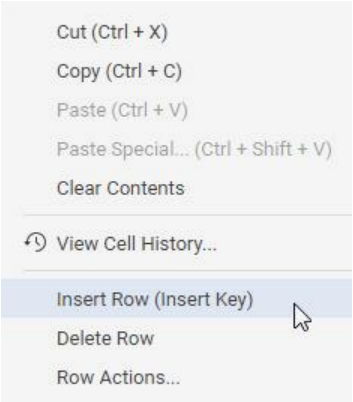
ADDING SHEET ROWS/TASKS

Rows are a key element in the sheet and can contain information like customer names, order information, or tasks. Rows can also include additional information, like attachments and comments.

ADDING ROWS

1. **Right-click** in a task **row** where you wish to add a new row and choose **Insert Row**

   Grouping related tasks together in contiguous rows will help you work with them and track them later.



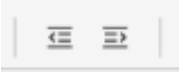
2. Enter a **task name** in the task name column/cell per this new task
3. Repeat these steps until you have entered all projects tasks
4. Enter data in each cell along each row, which is not locked by the project manager

> ***NOTE*** *– In many cases a project manager might name the primary column to Task Name. However, each individual project sheet might maintain a slightly different "task" name for the primary column in the sheet.*

INDENTING ROWS

Rather than facing hundreds of rows in one project at a time, easily condense your data so you can focus on a particular set of rows/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 top button bar

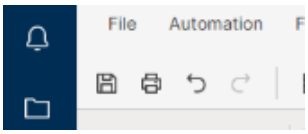


   Parent rows can be collapsed or expanded, helping you to concentrate on certain parts or your projects at one time.

> ***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 top left
2. To refresh your sheet, **click** on the **File** menu and choose **Refresh**



FILE SHARING

ROW ATTACHMENTS

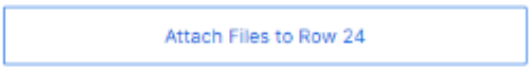
You can attach a file that is directly related to a row by using the row attachment feature.

RELATED VIDEO

ATTACHMENTS AND FILE SHARING

1. **Click** on the **Attachments** icon in the row you wish to attach a file to

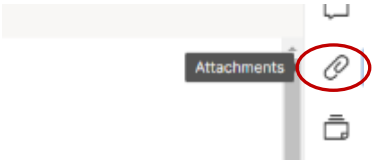
2. In the Attachments window **click** on the **Attach Files** button
3. Select from the various web file sharing platforms or choose to upload a file via your computer
4. Browse to the file on your computer and **click** on **Open**



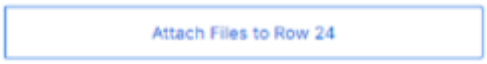
OR

5. Log into the selected web file sharing platform, **click** on **Allow, select** the **file** and, **click** on the **Select** button

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

***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.*

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.

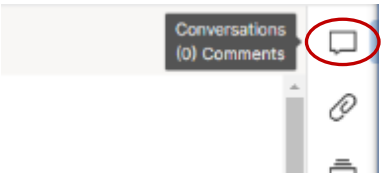
Related Video

Using Comments

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



4. **Click** on the **Comments** button at the right of your sheet
5. In the Comments window **enter** a **comment**
6. **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.

7. **Click** on the **Comments** button in the row you wish attach a file to
8. In the Comments window **click** on the **Attach** icon
9. Select from the various web file sharing platforms or choose to upload a file via your computer
10. Browse to the file on your computer and **click** on **Open**

    OR

11. 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.*

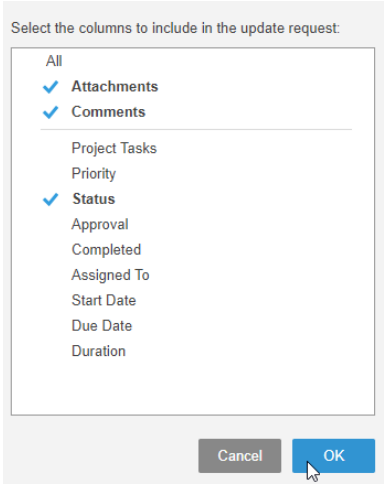
SEND AN UPDATE REQUEST

1. **Click** on the **Row Menu** button the row you wish to create an Update Request for, and choose **Send Update Request**

2. In the Send an Update Request window, **select who** you wish to send the Update Request to

3. **Enter a subject line** for the Update Request

   This should include either the row number or the task name.



4. **Enter a message** for the recipient of this Update Request

5. **Click** on the **Edit** button per the **Include:** area to **select** which sheet **columns** per this row will be editable from within the Update Request form the recipient receives, and **click** on **OK**

6. **Click** on the **Edit** button per the **Delivery:** area to select when the request will be sent, and **click** on **OK**

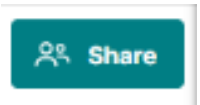
7. **Click** on **Send**

> ***NOTE*** *– The recipient will receive an email with a link to a form. They will simply enter row/task information into the form and click Submit Update.*

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 upper right. You may add contacts to your contacts list at any time by using the Add New button at the bottom of the Select Contacts window.*

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

Viewer	No license needed, can view all information in sheet, cannot modify anything
Editor – cannot share	No license needed, can edit sheet data, enter and edit comments, add files, they cannot modify the column layout, cannot add shares
Editor – can share	No license needed, can edit sheet data, enter and edit comments, add files, can add share, they cannot modify the column layout

5. **Add a subject line** and create message 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, the will be prompted to create an account at no charge. See this document's first page, Send This to First Time Assignees and or Sheet Invitees, in order to properly inform first time Smartsheet users of basic Smartsheet use.*