

Smartsheet

Making project management
smarter not harder

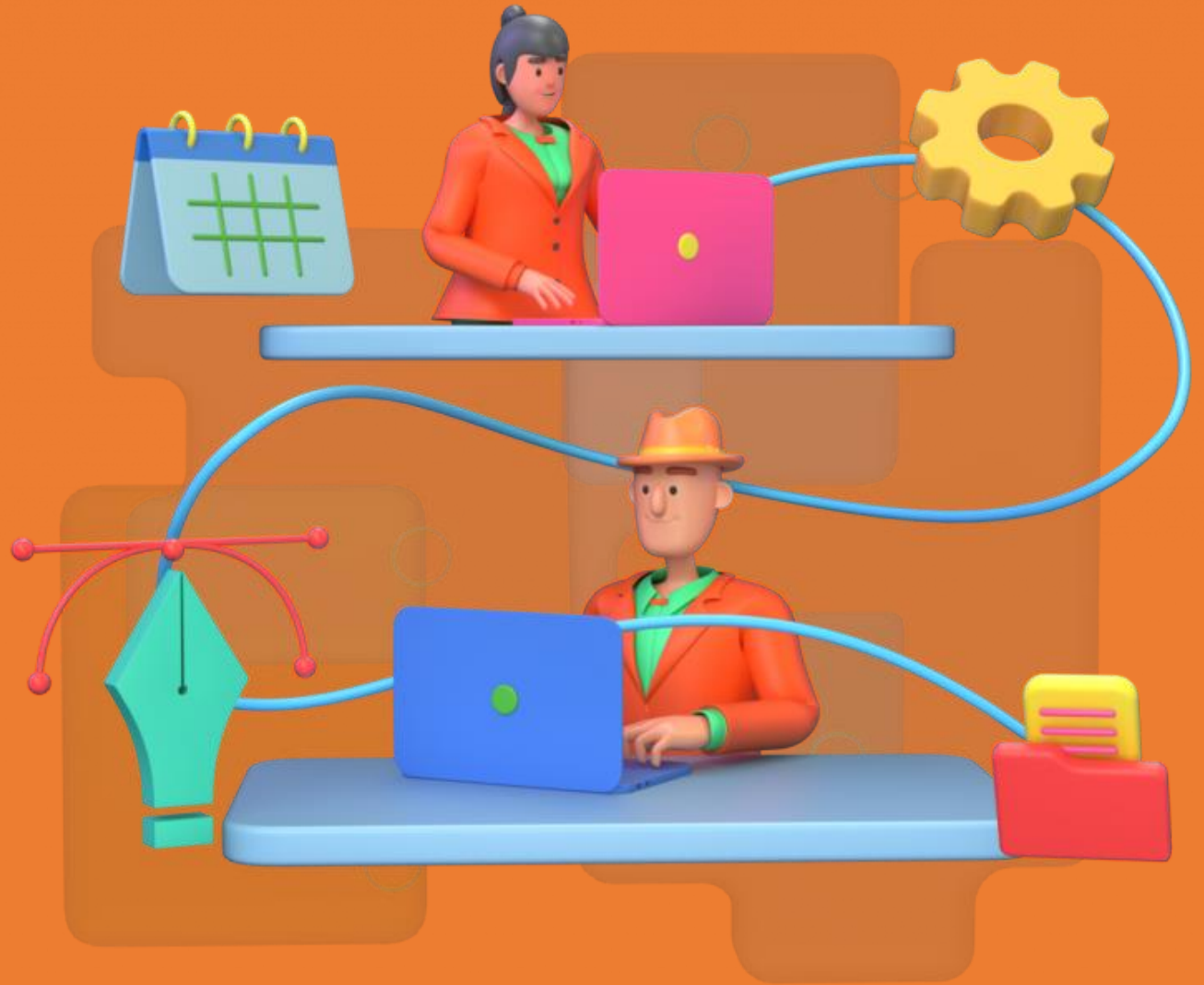
Background

- University of South Carolina School of Medicine Greenville's Continuing Medical Education program
 - Housed all CME program data
 - Used for reaccreditation
- Clemson University
 - Personal project management
 - Data manipulation



Overview

- Project management
 - Columns
 - Automations
 - Row actions
- Views
- Forms
- Reports

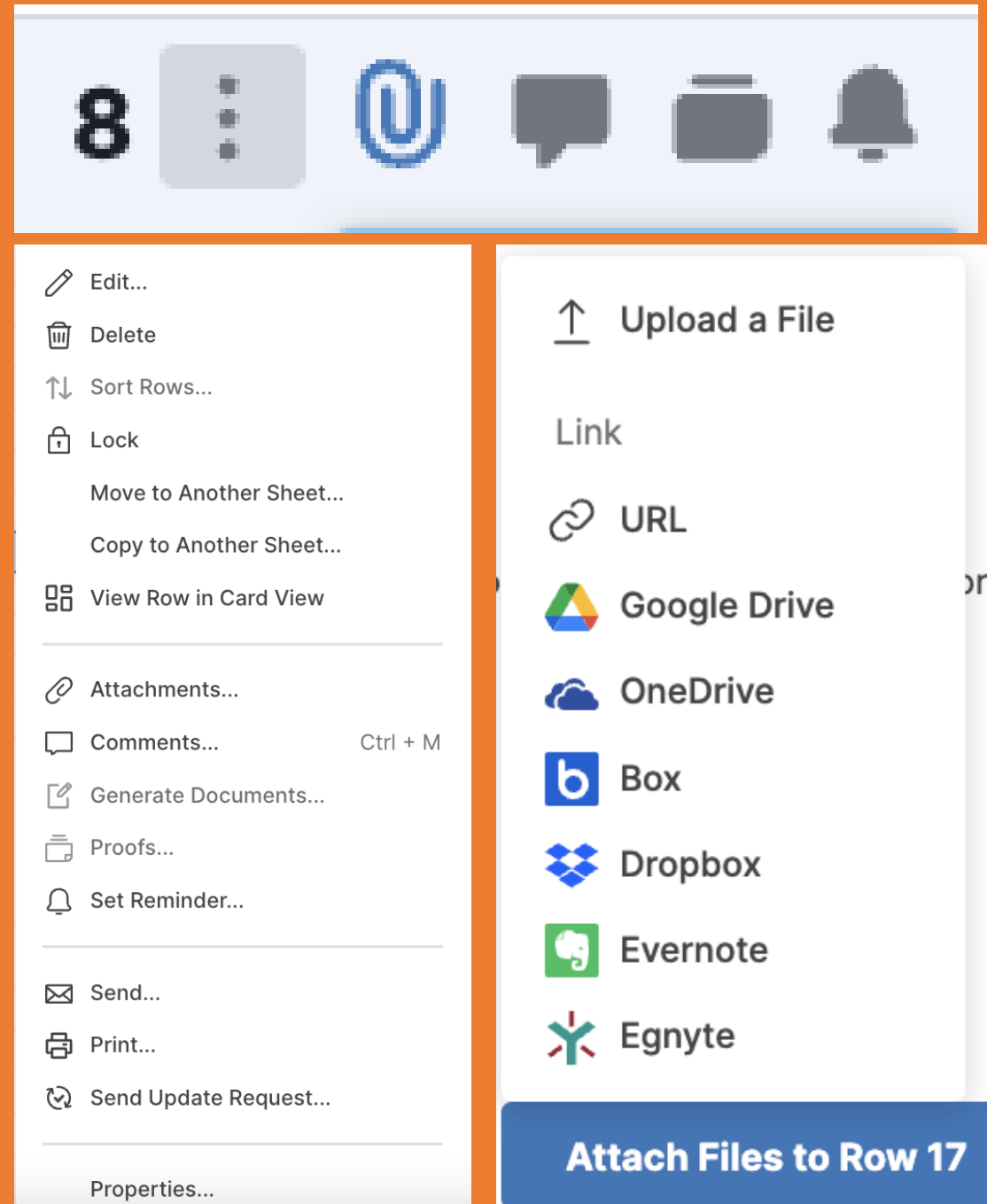


Project Management

File Automation Forms Connections					Databases Benchmarking Project Sheet ☆				
Grid View Filter Arial 10 B I U									
		Task Name	Person Responsible	Due Date	Task Completed?				
1		Helpful links and comments			<input type="checkbox"/>				
2		- Compile list of databases other institutions subscribe to			<input type="checkbox"/>				
3			S sally2@clemson.ec	01/20/23	<input checked="" type="checkbox"/>				
4			S sec8@clemson.edi	01/20/23	<input checked="" type="checkbox"/>				
5			J jgroff@clemson.edi	01/20/23	<input checked="" type="checkbox"/>				
6									
7		- Send lists to Karen to compile			<input type="checkbox"/>				
8			S sally2@clemson.ec	01/23/23	<input checked="" type="checkbox"/>				
9			S sec8@clemson.edi	01/23/23	<input checked="" type="checkbox"/>				
10			J jgroff@clemson.edi	01/23/23	<input checked="" type="checkbox"/>				
11		- Send complete list for review			<input type="checkbox"/>				
12			KB Karen Burton	01/27/23	<input checked="" type="checkbox"/>				
13		- Meet to discuss next steps			<input type="checkbox"/>				
14			J jgroff@clemson.edi	01/31/23	<input type="checkbox"/>				

Row actions

- Reminders
- Comments
 - Can tag people
- Attachments
- Generate documents
 - To fillable pdf
 - DocuSign integration



Columns

- Column types
 - Primary
 - Contact
- Column actions
 - Sort
 - Describe

New Column

Name

Enter a column name

Column Type

A1 Text/Number

☰ Dropdown list

📅 Date

🕒 Duration

👤 Contact list

✓ Checkbox

🔒 Symbols

Auto number

👤 Created by

📅 Created date

💬 Latest Comment

👤 Modified by

📅 Modified date

⋮

Insert Column Left

Insert Column Right

🗑 Delete Column

Rename Column...

📘 Add Column Description...

🔍 Filter...

↕ Sort Rows...

🔒 Lock Column

Freeze Column

Hide Column

📊 Show Gantt

Edit Project Settings...

Edit Column Properties...

Automations

- Trigger
- Condition?
- Action

New task assigned

Trigger: When rows are added or changed ▾

When Person Responsible ▾ changes

[+ Specify another change](#)

Run workflow: When triggered ▾

[Add a condition to filter rows](#)

Alert someone

Send to contacts in a cell ▾

Person Responsible

☒ Send from triggering user

New task in databases benchmarking project

You have been assigned {{Task Name}} due on {{Due Date}}. Please let me know if you have any questions!

Message includes links to sheet and all fields

Reminder to complete database lists

Trigger: When a date is reached ▾

Run once ▾ 1 week before ▾

☐ 10/21/23

☒ Date field Due Date ▾

2:00 PM ▾

US/Eastern (GMT-5)

Conditions (1) ▾

Where Task Completed? ▾ is not checked ▾

[+ Add another condition](#)

Otherwise

Alert someone

Send to contacts in a cell ▾

Person Responsible

☒ Send from triggering user

TBD

This is a friendly reminder to complete your list of databases at other institutions.

Includes message only

Task status update request

Trigger: When a date is reached ▾

Run once ▾ on ▾

☐ 10/26/23

☒ Date field Due Date ▾

8:00 AM ▾

US/Eastern (GMT-5)

Conditions (1) ▾

Where Task Completed? ▾ is not checked ▾

[+ Add another condition](#)

Otherwise

Request an update

Send to contacts in a cell ▾

Select a contact field ▾

☒ Send from Smartsheet Automation

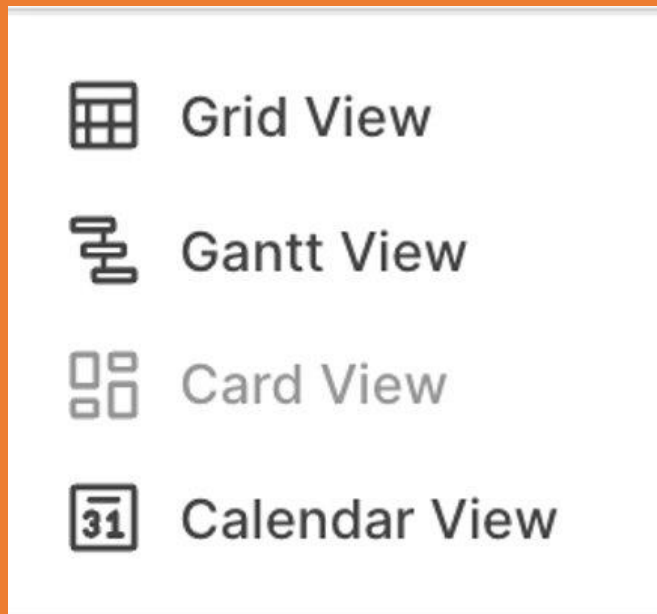
Task status?

Your task is due today. Please update the status or let me know if completion is delayed.

Includes 1 field

Views

- Filters
 - People
 - Dates
 - Ranges of numbers
- Other views






Edit Filter 'Test filter'

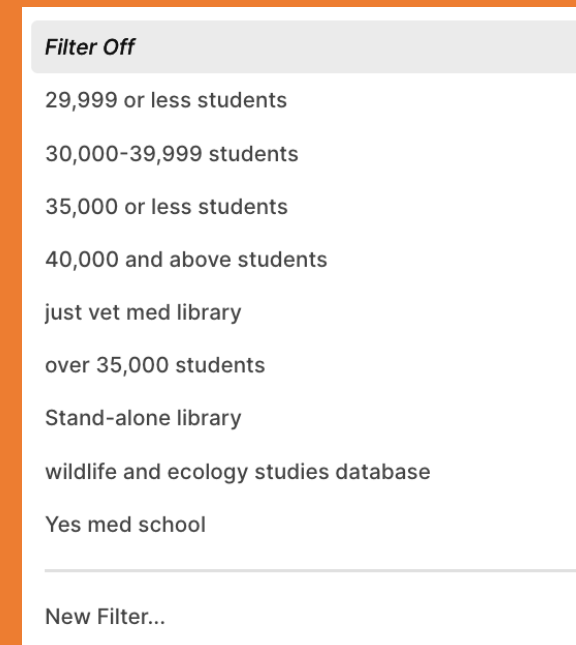
Name (Optional)
Test filter

Show rows that match [all conditions](#)

Ranking (US News & World ▾)	is between ▾	1	10	×
Approximate student enrol ▾	is between ▾	20000	30000	×
Type of VetMed Library ▾	is one of ▾	Stand-alone ▾		×
Select Field ▾	▾			

☐ Include parent rows



Forms

- Maps to column
- Controlled vocabulary by drop-down menus
- Link or embed form

College	Department	Name	Email	Feedback
Libraries	Teaching and Learning	my name	my email	feedback here

Reports

- One sheet or multiple sheets
 - Depends on license
- ILL statistics
 - Journal name
 - Date of request
 - Faculty or student

Primary Column	Request Type	Creation Date	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Journal Title	Photo Journal Volume	Photo Journal Issue	Photo Journal Month	Photo Journal Year	Photo Journal Inclusi... Pages	Photo Article Author	Photo Article Title	ISxN	Status	Depar...
	Article	06/29/22							Leisure s	13	3		1991	185-204	I. Ajzen &	Predictor		Staff	Agricult
	Loan	06/20/22	Robinson	The High	Little, Bro		2022	First Editi									9780316	Faculty	Agricult
	Loan	06/07/22		Extensior	Thompso		1994	2nd									ISBN-1-5	Staff	Agricult
	Loan	06/06/22	Isaacs, Ti	Moral res	Oxford Ui		2011										978-0199	Faculty	Agricult
	Article	05/19/22							Journal o	38			1963	85-86 (un	Wray DL,	Collembo		Faculty	Agricult

3 Columns

2 Filters

Group

Summ

Creation Date x

Status x

Photo Journal Title x

☐ Created

☐ Created By

☒ Creation Date

☐ Department

Photo Journ... is not blank

Request Type is one of

1 Selected

Blank

Article (859)

Loan (250)

Cancel

Academic radiology.	09/03/20	Staff
Access Microbiology	10/16/19	Graduate
Access Microbiology	10/16/19	Graduate
Achieving sustainable cultiv	02/25/20	Faculty
Acta astronautica.	07/26/20	Faculty
Acta astronautica.	07/26/20	Faculty
Acta Horticulturae	09/19/21	Undergraduate

3 Sorts

Sort by

Photo Journal Ti... Sort Ascending x

Then by

Creation Date Sort Oldest to N... x

Then by

Status Sort Ascending x

Cancel


OK

How do I get Smartsheet?

- <https://www.smartsheet.com/pricing>

USD (US Dollar) ▼

Monthly pricing ☒ Yearly pricing

<div>Free</div> <div>\$0</div> <div>No cost 1 user, up to 2 editors</div> <div>Try for free</div> <div>For people just getting started with task and project management.</div>	<div>Pro</div> <div>\$7</div> <div>Per user/month, billed yearly Max of 10 users, unlimited viewers</div> <div>Try for free</div> <div>Or purchase now</div> <div>For people and teams that want to track, share, and manage projects with unlimited viewers.</div>	<div>RECOMMENDED</div> <div>Business</div> <div>\$25</div> <div>Per user/month, billed yearly Min 3 users, unlimited editors</div> <div>Try for free</div> <div>Or purchase now</div> <div>For businesses that want to manage projects and programs with unlimited free editors.</div>	<div>Enterprise</div> <div></div> <div>Contact us</div> <div>For organizations that run processes at scale with enterprise-grade security and controls.</div>
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Questions?

- kbburto@clemson.edu
- <https://libraries.clemson.edu/research/subject-librarians/>

