SMARTSHEET TRAINING

Our customised virtual instructor led Smartsheet training programs provide a hands-on learning experience that can be tailored to your individual needs.

Benefit from our experience and knowledge of best Smartsheet practices for fast, successful process and project implementations. Downloadable Activities and Participant Manual (PDF) are included.

CUSTOMISED TRAINING — 4 HOUR REMOTE MODULE

✓ We work with you to determine your training needs, delivering tailored content so that you can hit the ground running quickly

MENTORING MODULE — 4 HOUR REMOTE MODULE

✓ We review your existing solution/s, identifying enhancement opportunities while training you along the way

ADMIN ESSENTIALS — 2 HOUR REMOTE MODULE
RECOMMENDED FOR SYSTEM ADMINISTRATORS

✓ User & Group Management
✓ Configuring Account Settings
✓ Branding
✓ Backups

GETTING STARTED, SHEETS AND PROJECT MANAGEMENT ESSENTIALS — 4 HOUR REMOTE MODULE

Getting Started
✓ Overview
✓ Logging-In and Out
✓ Personal Settings
✓ Navigation and Organisation
✓ User Types and Permissions
✓ Creating Workspaces & Folders

Project Management
Create a Project Management sheet using:
✓ Hierarchies
✓ Dependencies & Predecessors
✓ % Complete
✓ Automated Status Symbols
✓ Conditional Formatting
✓ Gantt Charts, Calendar and Card Views
✓ Resource Management

It's all about the Sheets
Understanding elements & features:
✓ Columns, Rows, Hierarchies
✓ Formatting
✓ Filtering
✓ Sheet Summary Data
✓ Tracking Changes: Cell History, Activity Log, Highlight Changes
✓ Attachments & Conversations
✓ Reminders, Send and Send Update Requests
✓ Cell Linking
✓ Exporting & Importing data
✓ Template creation

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FORMS, AUTOMATED ALERTS, APPROVAL REQUESTS AND PROOFING

4 HOUR REMOTE MODULE

Forms
- ✓ Create and deploy Forms to collect information (e.g. surveys, registrations work/service requests)

Email/Alert Communications
- ✓ Automated Notifications, Update Requests, Reminders
- ✓ Approval Requests
- ✓ Proofing

REPORTING & VISUALISING KEY DATA WITH FORMULAS, REPORTS AND DASHBOARDS

4 HOUR REMOTE MODULE

- ✓ Create Formulas referencing cells, ranges, columns and data from other sheets
- ✓ Create and modify reports
- ✓ Understanding Permissions & Report Views
- ✓ Create and modify Dashboards
- ✓ Publish Dashboards, Sheets and Reports

SMARTSHEET EDITORS/COLLABORATORS

RECOMMENDED FOR NON-LICENSED USERS WHO WILL BE UPDATING SHEETS **2 HOUR REMOTE MODULE**

- ✓ Smartsheet Overview
- ✓ Logging-In and Out
- ✓ Personal Settings
- ✓ Navigation and Organisation
- ✓ Updating Sheets
- ✓ Attachments and Conversations
- ✓ Highlight Changes
- ✓ Views: Gantt, Calendar, Card
- ✓ Notification Centre
- ✓ Responding to Proofing Requests
- ✓ Mobile App

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