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.

Programs 1-4 are designed to be completed in succession.

SOLUTION FAST TRACK

- ✓ We review your existing solution/s, identifying enhancement opportunities while training you along the way
- ✓ We recommend an infrastructure to suit your reporting and collaboration needs

1. SYSTEM ADMINISTRATION ESSENTIALS   2 HOUR REMOTE SESSION

RECOMMENDED FOR SYSTEM ADMINISTRATORS
- ✓ User & Group Management
- ✓ Configuring Account Settings
- ✓ Branding
- ✓ Backups

2. SMARTSHEET ESSENTIALS   4 HOUR REMOTE SESSION

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

2. **It's all about the Sheets**
   - ✓ Columns, Rows, Hierarchies
   - ✓ Formatting
   - ✓ Filters
   - ✓ Sheet Summary Data
   - ✓ Tracking Changes: Cell History, Activity Log, Highlight Changes
   - ✓ Attachments & Conversations
   - ✓ Reminders, Send and Send Update Requests

   - ✓ Exporting & Importing data
   - ✓ Template creation
   - ✓ Cell Linking

3. **Project Management**
   Create a Project Management sheet using:
   - ✓ Hierarchies
   - ✓ Dependencies & Predecessors
   - ✓ % Complete
   - ✓ Automated Status Symbols
   - ✓ Conditional Formatting
   - ✓ Gantt Charts, Calendar and Card Views
   - ✓ Critical Path
   - ✓ Task Assignment
   - ✓ Resource Management

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3. FORMS & AUTOMATION   4 HOUR REMOTE SESSION

Web Forms
- ✓ Create and deploy Forms to collect information e.g. surveys, quality inspection reports, OH&S reports, event registrations, product orders or service requests

Creating Automated Communications
- ✓ Reminders
- ✓ Automated Notifications - e.g. task assignments, status changes
- ✓ Update Requests - e.g. contractor work updates
- ✓ Approval Requests – e.g. expenses, leave, purchase orders, process gateways
- ✓ Proofing – create proofing requests for PDFs & images

4. REPORTS, FORMULAS AND DASHBOARDS   4 HOUR REMOTE SESSION

- ✓ Create and modify row and sheet summary reports
- ✓ Create formulas referencing cells, ranges, columns and data from other sheets
- ✓ Using Sheet Summary Data and Metric Sheets

- ✓ Understanding permissions & report views
- ✓ Create Dashboards to visualise key data
- ✓ Publish Dashboards, Sheets and Reports

CUSTOMISED TRAINING

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

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