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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

School of Medicine Greenville

Overview

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

CC licensed from https://3dbay.io/image/project-management-1
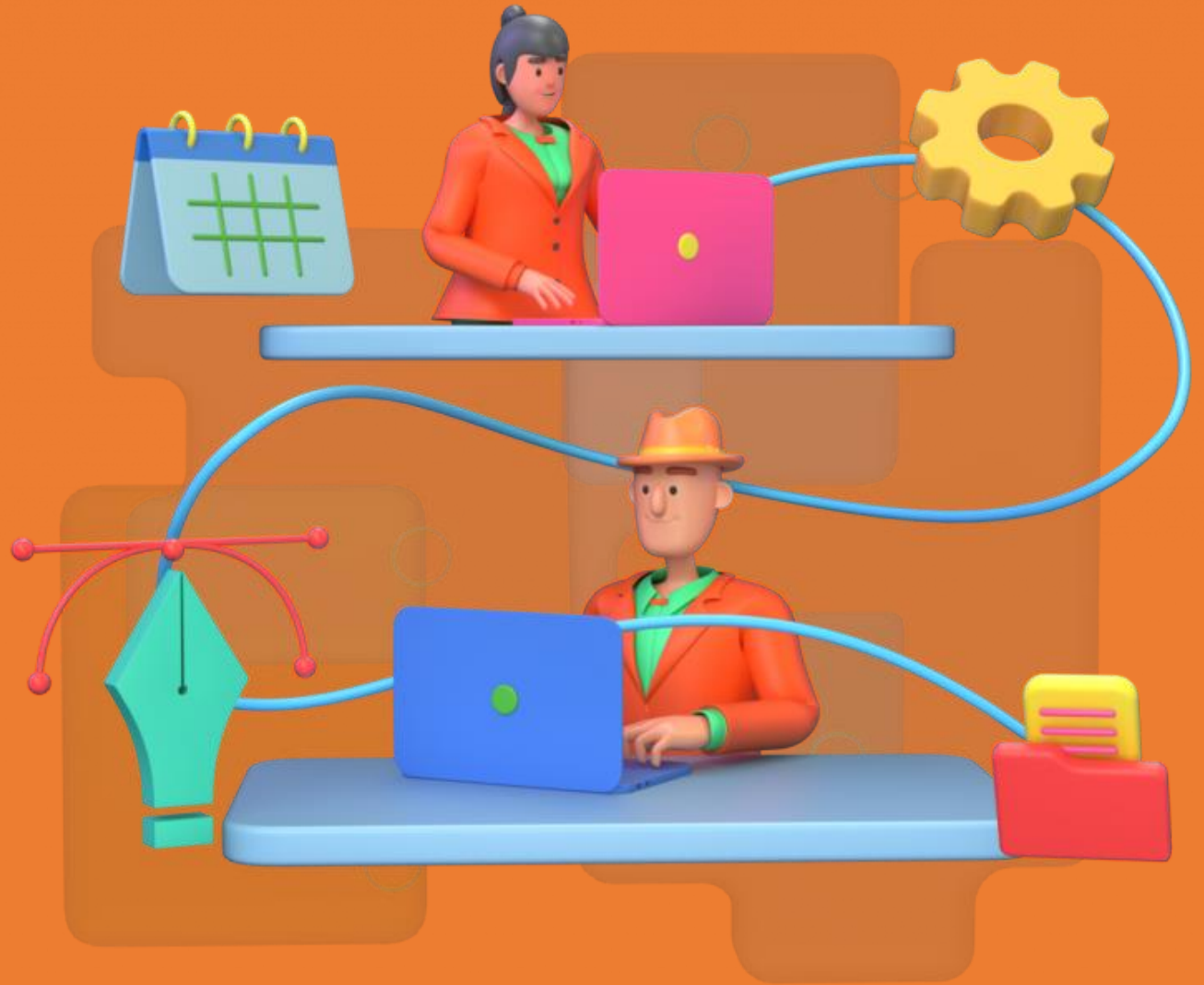
Project Management

| File | Automation | Forms | Connections | | 📄 **Databases Benchmarking Project Sheet** ☆ |

Row actions

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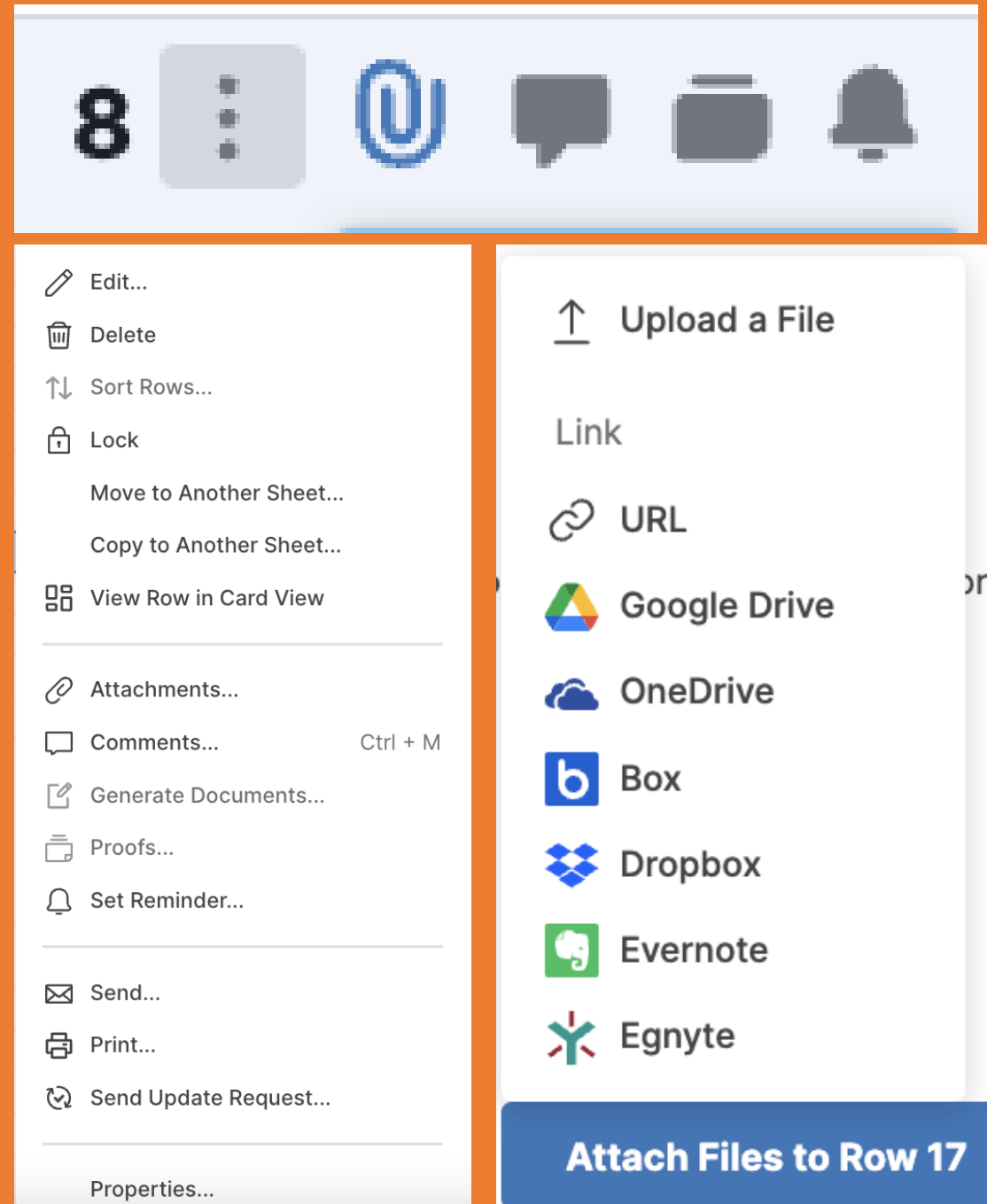
Columns

- 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

Column menu

Insert Column Left

Insert Column Right

🗑 Delete Column

Rename Colmn...

ⓘ Add Column Description...

▽ Filter...

↑↓ Sort Rows...

🔒 Lock Column

Freeze Column

Hide Column

🔀 Show Gantt

Edit Project Settings...

Edit Column Properties...

Automations

- Trigger
- Condition?
- Action

Views

- Filters
  - People
  - Dates
  - Ranges of numbers
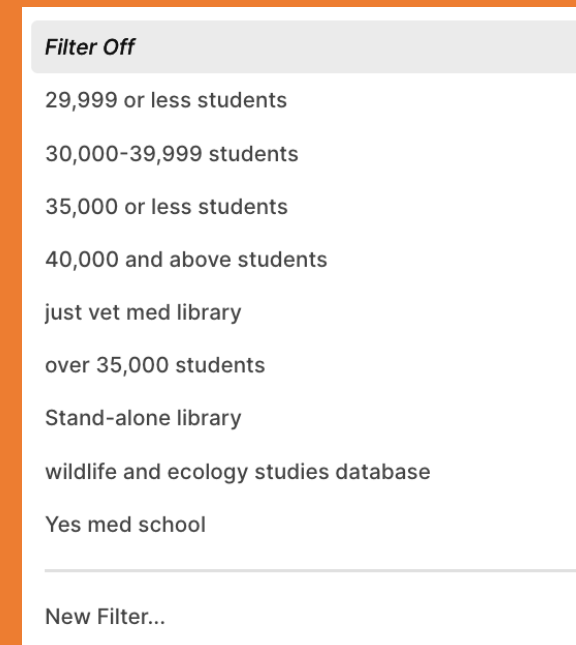- Other views
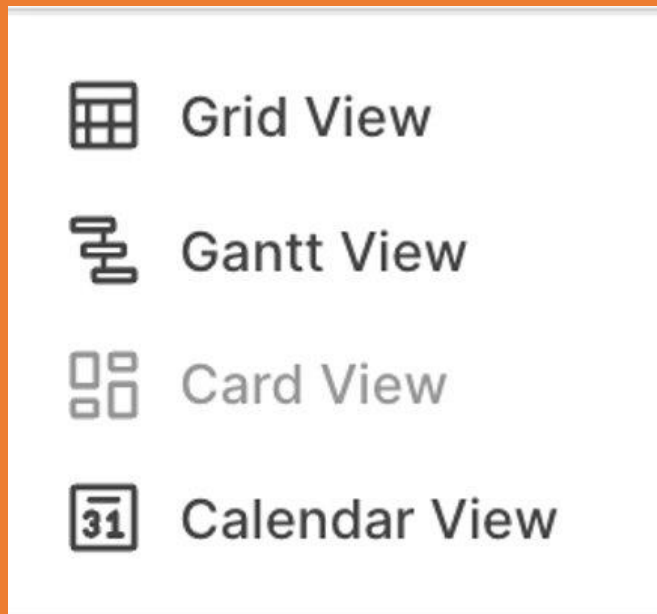
Edit Filter 'Test filter'

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

🗑 Cancel **Apply**

田	Grid View
콛	Gantt View
品	Card View
31	Calendar View

Filter Off

29,999 or less students

30,000-39,999 students

35,000 or less students

40,000 and above students

just vet med library

over 35,000 students

Stand-alone library

wildlife and ecology studies database

Yes med school

New Filter…

Forms

- Maps to column

- Controlled vocabulary by drop-down menus

- Link or embed form

Reports

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

How do I get Smartsheet?

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

Questions?

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