

Smartsheet

Making project management
smarter not harder

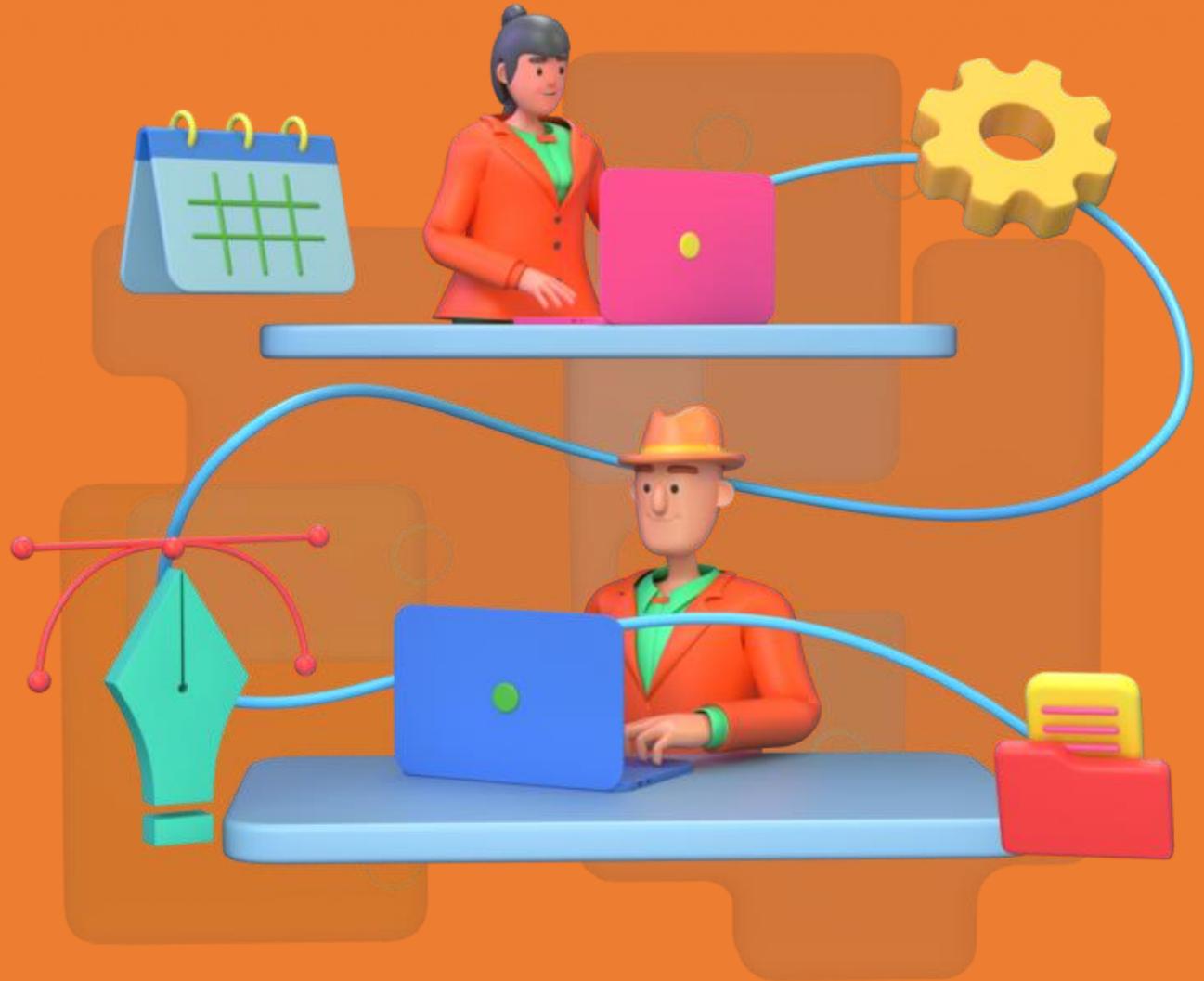
Background

- 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

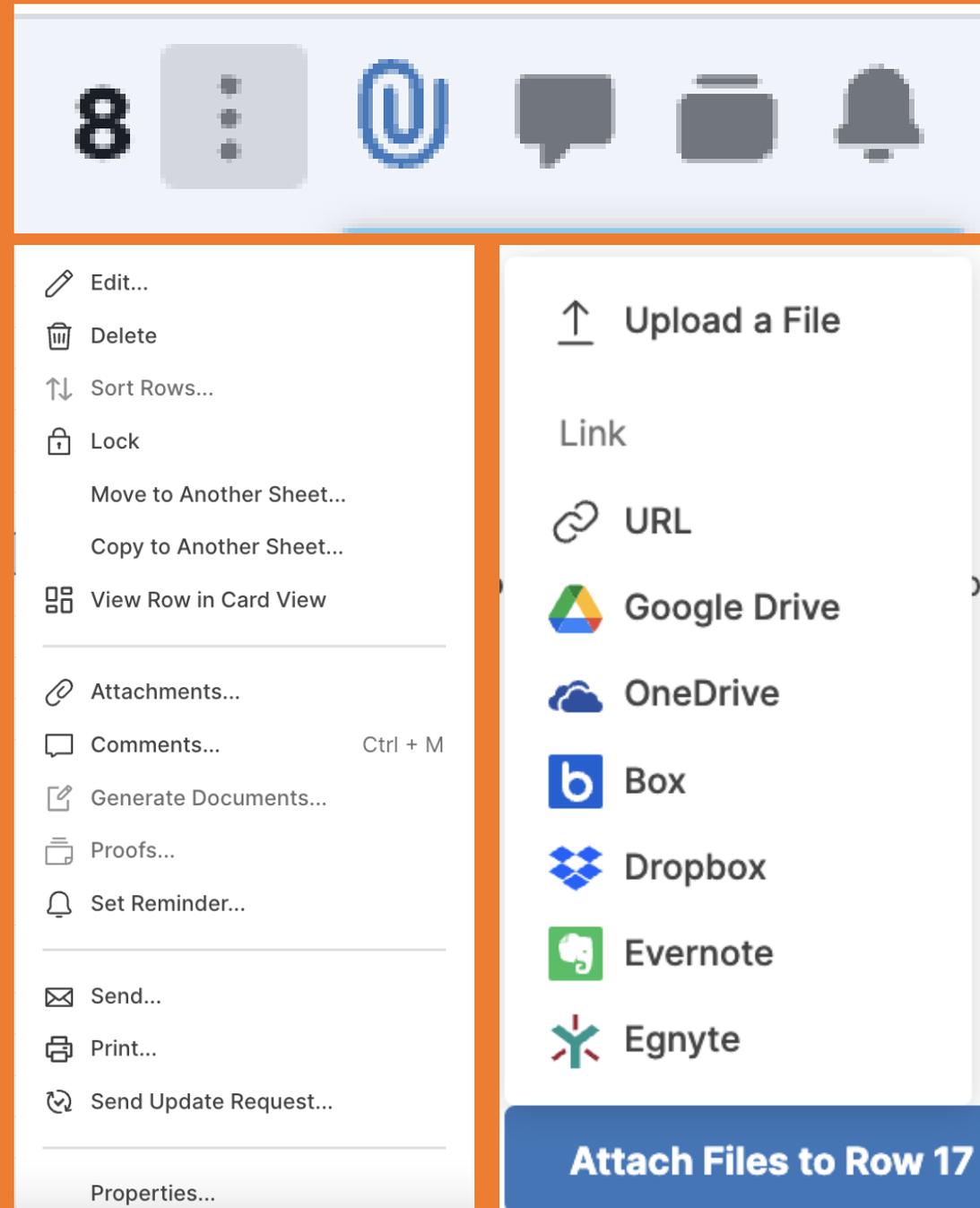
Databases Benchmarking Project Sheet ☆

Grid View Filter Arial 10 B I U A

	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		sally2@clemson.ec	01/20/23	<input checked="" type="checkbox"/>
4		sec8@clemson.edi	01/20/23	<input checked="" type="checkbox"/>
5		jgroff@clemson.edi	01/20/23	<input checked="" type="checkbox"/>
6				
7	- Send lists to Karen to compile			<input type="checkbox"/>
8		sally2@clemson.ec	01/23/23	<input checked="" type="checkbox"/>
9		sec8@clemson.edi	01/23/23	<input checked="" type="checkbox"/>
10		jgroff@clemson.edi	01/23/23	<input checked="" type="checkbox"/>
11	- Send complete list for review			<input type="checkbox"/>
12		Karen Burton	01/27/23	<input checked="" type="checkbox"/>
13	- Meet to discuss next steps			<input type="checkbox"/>
14		jgroff@clemson.edi	01/31/23	<input type="checkbox"/>

Row actions

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



The image shows a screenshot of the Google Sheets interface. At the top, there is a toolbar with icons for a grid (8), a menu (three dots), a link (U), comments (speech bubble), attachments (paperclip), and a reminder (bell). Below the toolbar, the 'Row actions' menu is open, displaying a list of options. The menu is divided into two columns. The left column contains: Edit..., Delete, Sort Rows..., Lock, Move to Another Sheet..., Copy to Another Sheet..., View Row in Card View, Attachments..., Comments... (with a keyboard shortcut Ctrl + M), Generate Documents..., Proofs..., Set Reminder..., Send..., Print..., and Send Update Request... The right column contains: Upload a File, Link, URL, Google Drive, OneDrive, Box, Dropbox, Evernote, and Egnyte. At the bottom of the right column, there is a blue button that says 'Attach Files to Row 17'. The background of the slide is orange.

Columns

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

New 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) Otherwise

Where Task Completed? ▾ is not checked ▾

[+ Add another condition](#)

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) Otherwise

Where Task Completed? ▾ is not checked ▾

[+ Add another condition](#)

Request an update

Send to contacts in a cell ▾

Select a contact field ▾

Send from Smartsheet Automation

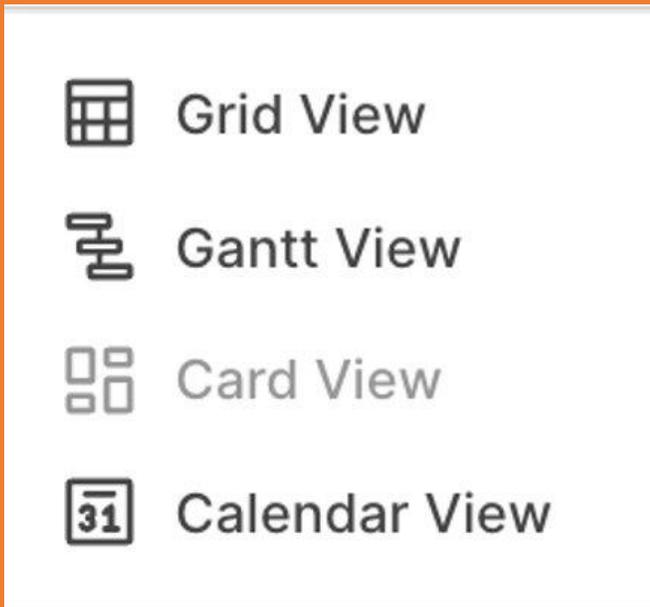
Task status?

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



-  Grid View
-  Gantt View
-  Card View
-  Calendar View

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

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

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

The screenshot shows the Smartsheet form editor interface. On the left, there are panels for 'Fields' (containing 'Primary Column') and 'Form Elements' (containing 'Heading/Description', 'Divider', and 'File Upload'). The main preview area shows a form titled 'Research Symposium 2023 Feedback' with a description, a 'College' dropdown menu, a 'Department' text input, and a feedback text area. On the right, there are settings for the form title and description, including a 'Do not show title and description' toggle.

The screenshot shows the 'Forms' menu in Smartsheet. It has two tabs: 'Forms' and 'Connections'. Under the 'Forms' tab, there are three options: '+ Create Form...', 'Manage Forms...' (with a gear icon), and 'Learn about Forms' (with a play button icon).

The screenshot shows a dropdown menu titled 'College'. The menu is open, showing a list of options: CAFLS, AHH, CBSHS, COB, COE, CECAS, COS, Libraries, Extension, and Other. The 'Libraries' option is highlighted.

The screenshot shows the 'Research Symposium 2023 Feedback' form. It includes a title, a description, a 'College' dropdown menu (with 'Libraries' selected), a 'Department' text input (with 'Teaching and Learning' entered), a feedback text area (with 'feedback here' entered), and a 'Submit' button. There are also optional fields for 'Name' and 'Email' and a checkbox for 'Send me a copy of my responses'.

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	Thompo		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

+ Add a Condition

+ New

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

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

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

