

Smartsheet. Work Better.™

Project Management Fundamentals

Whether orchestrating simple tasks or complex portfolio management, Smartsheet helps project managers align the right people, resources, and schedules to get work done. The Project Management Fundamentals course provides hands-on learning on how to use Smartsheet to initiate, plan, execute, control, and close projects.

Who should take this course?

This course is for existing and emerging project managers, as well as anyone who is involved in projects or change management. It's ideal for project managers, project coordinators, team leads, functional managers, product managers, program managers, and project team members.



Course Details

Length: Twelve hours (Three 4-hour sessions)

Format: Virtual Classroom

Prerequisites: Must be a licensed user of Smartsheet



Course Includes

- Take-home activities to reference
- A free 60 minute Design Desk coaching session with a Smartsheet expert, who will help you apply the concepts learned to your everyday work, after the class



You'll Learn How to:

- Create and set up a new project sheet based on project criteria
- Produce a work breakdown structure (WBS) and task relationships
- Establish a base calendar with working and non-working days
- Assign resources to tasks
- Create task reports
- Develop and modify a project baseline to track progress
- Analyze, interpret, and adjust the project's resources, cost, and schedule information
- Use the appropriate collaborative tools with teams and stakeholders to keep them informed
- Use Smartsheet Sights[™] to create a master project Sight to track key metrics across multiple projects



Course Contents

Creating the Base Project Sheet

- Create a new project file using Import, Template and Save as New options
- Transfer the Work Breakdown Structure to Smartsheet Hierarchies
- Add and configure columns for project use
- Apply Conditional Formatting
- Transform the base sheet to a project sheet
- · Adjust the Working and Non-Working days of the plan
- · Create task relationships
- · Adjust the task lag and lead time

Working with Resources

- · Assign resources to tasks
- · Assign multiple resources to a task
- Enable the Resource Management Tool
- Track resource scheduling conflicts in Resource Management
- · Create and Share Resource Views
- · Export and deploy custom Resource Views

Finalizing the Project Plan

- · Use formulas to automate sheet activities
- Create Variance columns to track schedule, work, and budget performance
- Build Cell Links between sheets to track and consolidate data
- Display the critical path to examine the plan
- Create a project baseline to track the project progress

Tracking Risk/Issue/Change Request

- Use Smartsheet Forms to collect feedback/requests from across the organization
- Automate notifications to team members
- Create reports to manage Change Requests, Issues, and Risks

Work Collaboration and Updating the Plan

- Share Workspace and Sheets with team members
- Use Update Requests to keep tasks on track
- Create and deploy task list reports to project team members
- Set Notifications to automatically alert the team of changes to the project plan
- Set Reminders to proactively notify you or your team of upcoming task deadlines

Reports & Sights

- Create reports for tracking project progress
 - Status Reports
 - Risk Reports
 - Resource Reports
- Build and deploy a Smartsheet Sight to communicate key project metrics to the project team and stakeholders