



# smartsheet ENGAGE

2017

## *Collaborative Work Management*

### COURSE OVERVIEW

Unlock the tools, tips and tricks, and best practices we've distilled from our work with the world's leading businesses. Collaborative Work Management in Smartsheet is a hands-on learning experience that will teach you how to use Smartsheet to initiate, plan, execute, control, and close projects and processes. Topics range from how to best create a new sheet to optimize collaboration to how to best break your work down into manageable tasks. You will also learn how to create a calendar to keep your team accountable, assign resources to tasks, build task reports and collaborate with team and stakeholders using Smartsheet Sights – all the knowledge you need to Work Better.

### QUICK FACTS

<b>When</b>	September 21st, 2017   8:00am - 3:00pm
<b>Where</b>	Smartsheet HQ in Bellevue, WA
<b>Cost</b>	\$525, exclusively offered for ENGAGE attendees
<b>Prerequisites</b>	None

### COURSE OBJECTIVES

- Create and properly set up a sheet given specific criteria
- Develop and modify a method to track the progress of your work
- Analyze, interpret, and adjust your team's resources, budget, and schedule information
- Use the appropriate collaborative tools to keep your team and stakeholders informed
- Use Smartsheet Sights to create a master dashboard to track key metrics across multiple projects and workstreams



## TRAINING AGENDA

### Intro

- Module 1** Creating the Base Project Sheet
- Module 2** Working with Resources
- Module 3** Finalizing the Project Plan
- Module 4** Work Collaboration and Updating the Plan
- Module 5** Creating Reports and Sights™

## 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

## WORK COLLABORATION AND UPDATING THE PLAN

- Share Workspace and sheets
- 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

## CREATING THE BASE PROJECT SHEET

- Create a new project file
- 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

## 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

## CREATING REPORTS AND SIGHTS

- Create reports for tracking project progress, including status reports, risk reports, and resource reports
- Build and deploy a Smartsheet Sight to communicate key project metrics to the project team and stakeholders