



# smartsheet ENGAGE

2017

## *Smartsheet Essentials*

### COURSE OVERVIEW

Learn the fundamentals from experts who know Smartsheet better than anyone. This one day class is designed to help all Smartsheet users get the most of their investment in the product. Topics covered include: instruction of common features and their uses, best practices for effectively using the tool, and hands-on practice to solidify the learning.

### QUICK FACTS

**When** September 21st, 2017 | 8:00am - 3:00pm  
**Where** Smartsheet HQ in Bellevue, WA  
**Cost** \$325, exclusively offered for ENGAGE attendees

### TRAINING AGENDA

#### Intro

- Module 1** Essentials
- Module 2** Collaboration
- Module 3** Reporting
- Module 4** Cell Linking and Formulas
- Module 5** Forms
- Module 6** Views
- Module 7** Sights™



## ESSENTIALS

- Sheet creation and setup
- Formatting
- Column types
- Home tab organization

## REPORTING

- How to create a report
- Reports as a high-level filter
- Use cases for reports
- How to work from a report
- Dynamic updating
- Sharing/sending reports
- Reporting Activity

## FORMS

- Use cases for forms
- How to create and customize a form
- How to test a form
- How a form populates a sheet
- Editing and distributing forms
- Forms Activity

## SIGHTS™

- Use cases for Sights
- How to create a Sight
- Sights best practices

## COLLABORATION

- Sharing permissions
- Sending sheets/rows
- Using Update Requests
- Publishing
- Track changes/history
- Setting alerts
- Attachments & comments
- Card View
- Workspaces
- Collaboration Activity

## CELL LINKING AND FORMULAS

- Creating Cell Links
- Working across multiple sheets via cell linking
- Using basic formulas
- Basic structure of formulas in Smartsheet
- Formulas that are unique to Smartsheet
- Cell Linking & Formulas Activity

## VIEWS

- Using Calendar View
- Gantt View
- How to create a project sheet
- How to work from the Gantt chart
- Enabling dependencies
- Project settings
- Resource Management
- PM Activity