



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 and Collaboration
- Module 2** Reporting
- Module 3** Cell Linking and Formulas
- Module 4** Web Forms
- Module 5** Views
- Module 6** Sights



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Work Better™



ESSENTIALS / COLLABORATION

- Personal settings and adding contacts
- Sheet creation and setup
- Formatting
- Collaboration and various collaboration tools
- Home Tab organization

REPORTING

- Reports as a high-level filter
- Use cases for reports
- How to create a report
- How to work from a report
- Dynamic updating
- Collaboration options

CELL LINKING AND FORMULAS

- Working across multiple sheets via cell linking
- Basic structure of formulas in Smartsheet
- Formulas that are unique to Smartsheet

WEB FORMS

- Use cases for web forms
- How to create a web form
- How to test a web form and understanding how it populates a sheet
- Editing and distributing web forms

VIEWS / PROJECT MANAGEMENT

- Calendar View
- Gantt View
- How to create a project sheet
- How to work from the Gantt chart
- Enabling dependencies
- Project settings

SIGHTS

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

