SMARTSHEET ESSENTIALS

References and Handouts

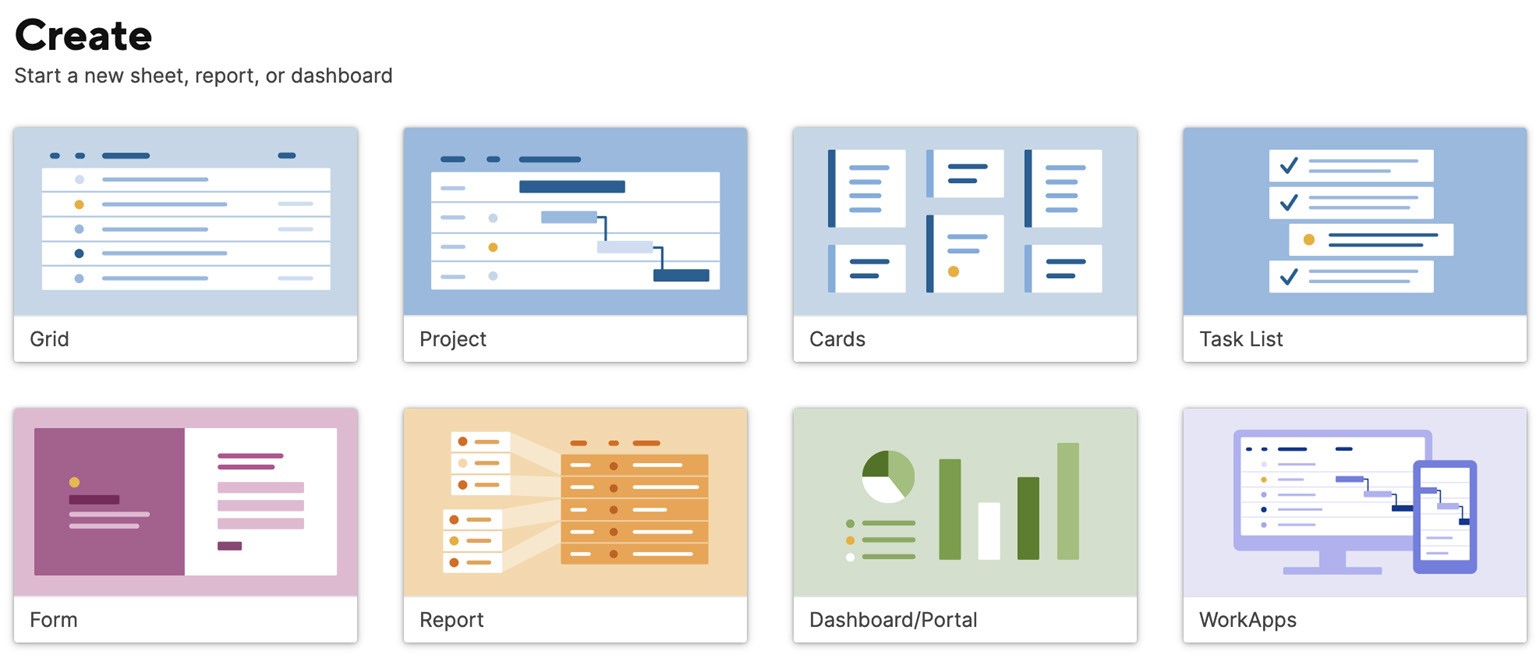
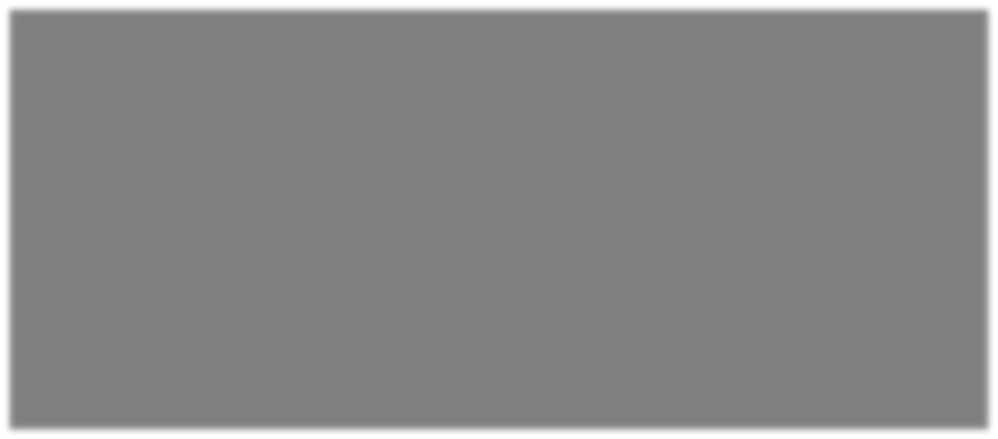
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# Smartsheet items and Definitions



|  |  |
| --- | --- |
| **Smartsheet item name** | **Overview** |
| **Grid** | Has no predefined columns—it's a clean slate. Use this when you want to start from scratch |
| **Project** | Includes common columns needed to create a project and enable Gant chart funconality. |
| **Card** | Provides what you need to start a card-based Kanban-style project. |
| **Task List** | Includes several predefined columns, including Task Name, Due Date, Assigned To, Done, and Comments. |
| **Forms** | Creates a basic three-column sheet with a form atached to it. Use this when you know you'll want to collect informaon from others with a form. |
| **Reports** | Work with real-me data from across mulple sheets in a single view. |
| **Dashboards** | Allows you to create a visual summary of sheet data or an informaon hub. |

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| --- | --- |
| **Standardize and customize your work with Smartsheet templates.**  Create your own templates or use one from the available options to help you maintain consistency across standard elements such as column names, column types, and conditional formatting rules. Standardization also helps you when creating rollup reports or dashboards from multiple sheets.  PLANS | |
|  | * Smartsheet * Pro * Business * Enterprise |
| For more information about plan types and included capabilities, see the [Smartsheet Plans](https://www.smartsheet.com/pricing) page. | |
| Saving a sheet as a template, like a project plan, can help you save time on your next project | |

and maintain consistency across column names, column types, conditional formatting rules, and other sheet elements. Maintaining consistency makes it easy to add reports and dashboards to your solution.

If you’re looking to jump-start your next solution, searching for inspiration, or want to learn from best-practices, create from a Template in the Template Gallery. Templates are pre-built with sheet, form, automation, report, and dashboard capabilities, making it easy for you to personalize and share a powerful solution for your use case.

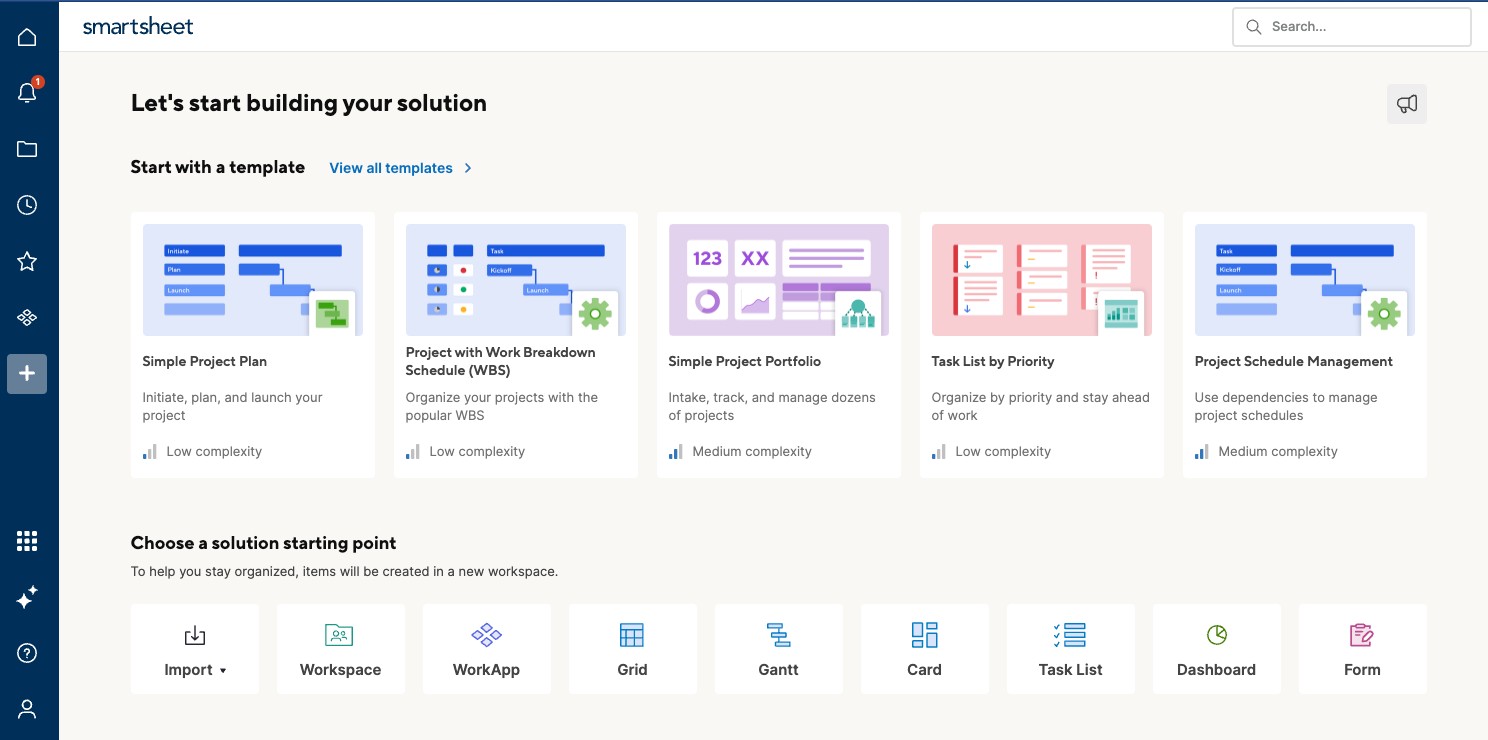
Saving a sheet as a template, like a project plan, saves you time on your next project and helps maintain consistency across standard elements, such as column names, column types, and conditional formatting rules. Maintaining consistency within project plan sheets makes it easy for you to add reports or dashboards to your solution.

If you need help getting started, consider working with our [Solution Services](https://www.smartsheet.com/services/solution-services) team. They can assess your situation and design a solution specifically for your needs.

## Create solutions from the Template Gallery

Browse, search, and create solutions from dozens of Templates right in Smartsheet.

Brandfolder Image



You can customize these pre-built templates in the same way you can edit sheets—for example, you can edit cell data, change column types, or include your own attachments as needed.

The sheet name is the same as the name of the template, but you can [rename it if needed.](https://help.smartsheet.com/articles/504531)

Some templates may include example data to help you understand certain features, such as comments, cell examples, formulas, and more. You can [eliminate examples from the template](https://help.smartsheet.com/articles/803778) by using **Save as New...** and selecting **Data and Formatting** preferences.

[Visit the Solution Center in Smartsheet Now](https://app.smartsheet.com/b/home?tg=explore)

## Create your own template

You can create a template from any existing sheet. Columns and conditional formatting rules are always saved to the template. You can also choose to include notification settings, and specific data and formatting options such as row data, manual formatting, attachments, discussions, and forms.

1. Open the sheet you'd like to save as a template.
2. Select **File** > **Save as Template** to open the **Save as Template** window.
3. Enter a name and description for your template.
4. Choose **Automated Workflow & Alert Options** and **Data & Formatting Options** to specify which of the options you would like to save with your template.

To retain column names and types only, uncheck **Sheet data and formatting**.

1. Select **Save**.

The template gets stored in the same folder or workspace as the originating sheet. You can drag it to other folders or workspaces from **Browse** if needed.

Your created templates are private. To modify a template, update the source sheet and save it as a new template. Keep in mind that any automated workflows exclude specific email addresses; re-enter them in new sheets derived from the template.

## Use a template that you created

To create a new sheet from your own template:

1. Locate the template. Select **Browse** on the navigation bar and choose the folder or workspace name in the left panel.
2. Select the template. A preview of the template appears.
3. Choose the **Use Template** button in the lower-right corner of the window to display the **Use Template** window.
4. Name your sheet and decide whether to include all the features you originally saved (for example: data and formatting, attachments, discussions, and forms). You can also choose to save the sheet in a different folder or workspace.
5. Select **Save**.

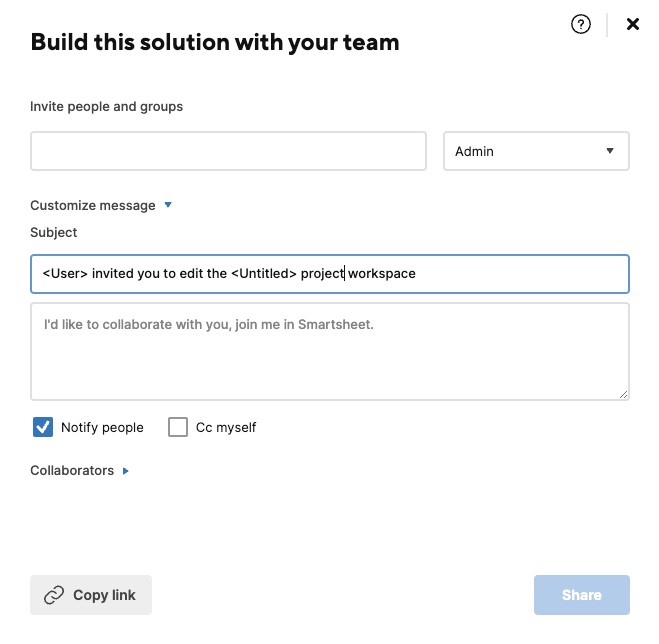
## Share a template

You can’t share templates individually, but there are two ways for you to share them:

1. [Move them into a shared workspace.](https://help.smartsheet.com/articles/506690#moveintoworkspace) Anyone shared to the workspace with **Admin** access can create new sheets if they’re a licensed user in Smartsheet.
2. When you create a new template from the template gallery, you can invite people to collaborate on the solution. Enter their email addresses, select their permission level, customize the invitation message, and then select the **Share** button.

If you’re in a Free or Trial plan, the sharing prompt automatically comes up after you download the template. Make sure to invite collaborators to help build the solution.

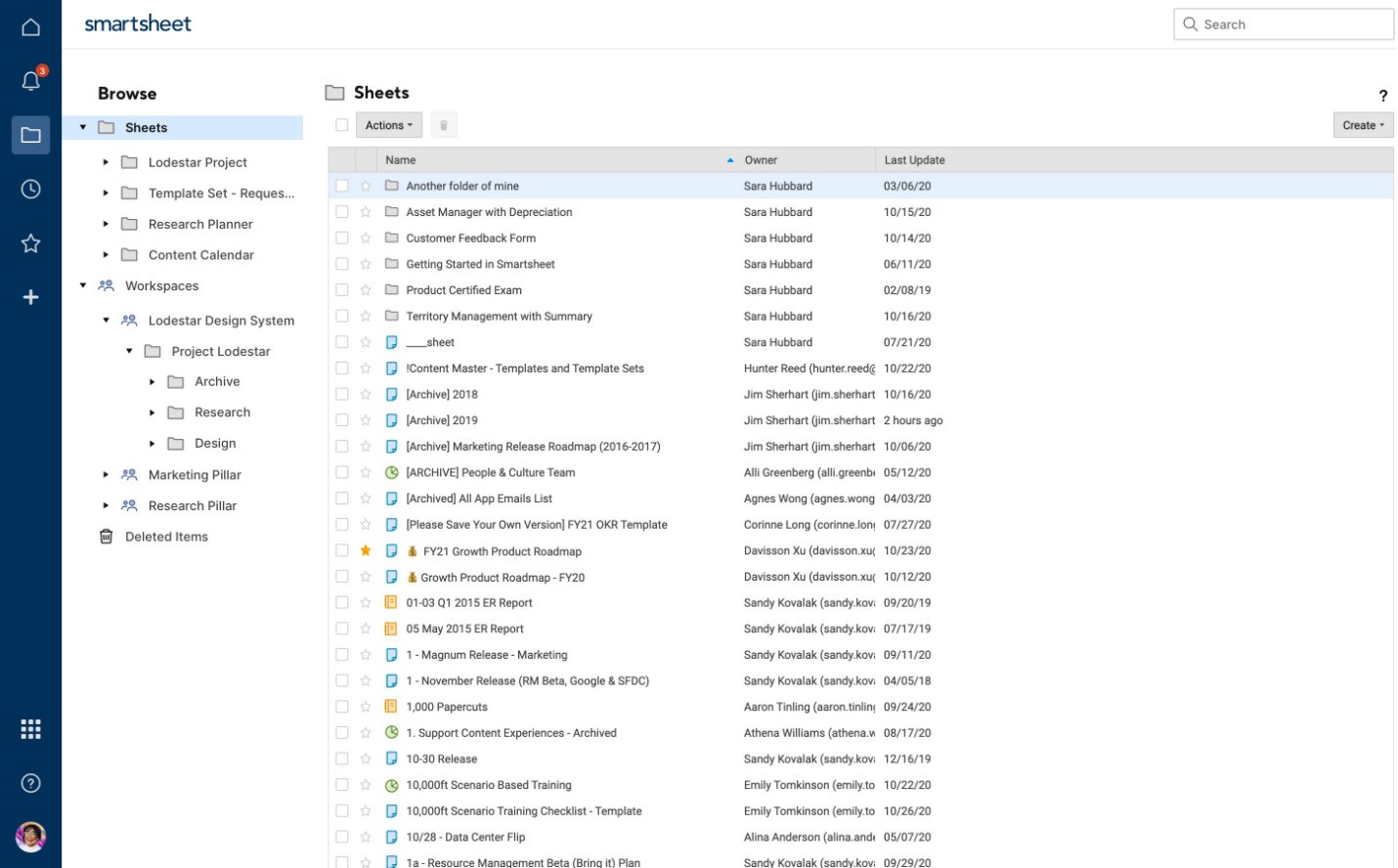
Brandfolder Image



When you create a template from the template gallery, it creates a new designated workspace for that template. Change the workspace name by hovering over the workspace name, selecting the three dots, and then selecting **Rename**. Enter the new name, and then select **Rename**.

# Access and organize your work from the left navigation bar

Hover over an icon on the navigation bar to see what the icon means; select the icon to go there.



[Home](https://help.smartsheet.com/articles/2482308-navigate-your-work-from-home)

See your recommended sheets, reports, and dashboards based on your Smartsheet activity.

[**Notifications**](https://help.smartsheet.com/articles/2476506-using-notification-center)

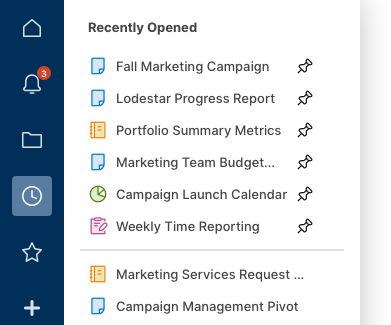
Take action quickly on other items (update requests, approval requests, notifications) as you work in Smartsheet.

## **Browse**

Contains every Smartsheet item that you own or are shared to. Here, you can organize your Smartsheet items into folders and [workspaces,](https://help.smartsheet.com/articles/506690) and access your work apps.

### Recently

See your most recently accessed Smartsheet items. This list can contain up to 20 items.



You can do the following actions in your **Recently Opened** panel:

* **Pin**:hover over an item and select the **Pin** icon  to keep it at the top of the panel. You can pin up to 20 items here. The order in which pinned items appear is based on when you’ve pinned them—newly pinned items appear closer to the top.

Because the **Recently Opened** contains only 20 items, pinning 20 items in **Recently Opened** prevents other items from appearing in the panel

* **Unpin**: Hover over a pinned item and select the **Unpin** icon next to items that are already pinned to unpin them.
* **Remove**: right-click the item in the list and select **Remove from Recents**.

Unpinning or removing an item from **Recently Opened** doesn't delete it or remove your access to it. You can always access items you own or are shared to from **Browse.**

### Favorites

Add frequently accessed items to **Favorites** to find them quickly.

Add sheets, reports or dashboards to favorites

1. Open a Smartsheet item.
2. Select the star icon next to its name.

Add workspaces to favorites

There are two ways to add or remove a workspace to favorites:

1. Go to **Browse > Workspaces**. A list of the workspaces is displayed.
2. Select the star icon next to the workspace's name. Or,
3. Open an item contained in the workspace.
4. Open the Solution Panel.
5. At the top of the Solution Panel, select the star icon next to the workspace's name.

Add folders to favorites

There are three ways to add or remove a workspace to favorites:

1. Go to **Browse > Sheets**.
2. Select the star icon next to the folder's name.

If the folder is contained in a workspace:

1. Go to **Browse > Workspace**.
2. Select the workspace that contains the folder.
3. Select the star icon next to the folder's name. Or,
4. Open an item contained in the folder.
5. Open the Solution Panel.
6. At the top of the Solution Panel, select the star icon next to the folder's name.

Removing an item from **Favorites** doesn't delete it or remove your access to it. You can always access items you own or are shared to from **Browse**.

[Create](https://help.smartsheet.com/articles/2482753-template-gallery)

Select the [Template Gallery](https://help.smartsheet.com/articles/522123)icon for templates to create new sheets, reports, dashboards, and more. You can create blank items to build from scratch, [import third-party files](https://help.smartsheet.com/articles/504553) into Smartsheet as new sheets, or start from a template.

# Grid, Gantt, Card, and Calendar Views

You can choose between:

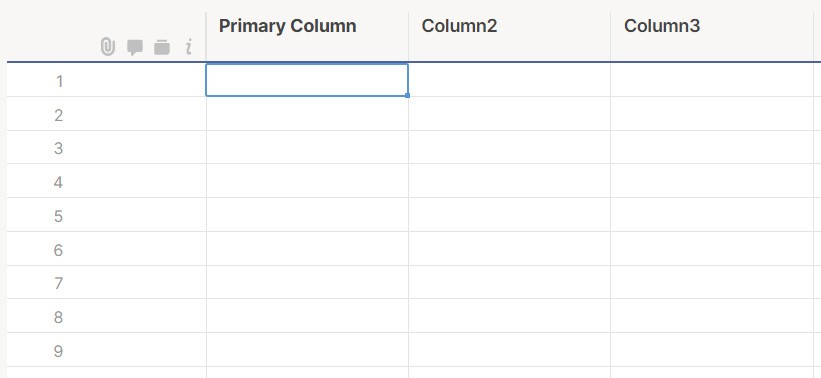
* [Grid View—](https://help.smartsheet.com/articles/765715-grid-gantt-calendar-and-card-views#grid)Displays data in a spreadsheet format.
* [Gantt View—](https://help.smartsheet.com/articles/765715-grid-gantt-calendar-and-card-views#gantt)Displays data in a spreadsheet on the left and a Gantt chart on the right.
* [Card View—](https://help.smartsheet.com/articles/765715-grid-gantt-calendar-and-card-views#card)Displays data in cards organized in lanes.
* [Calendar View—](https://help.smartsheet.com/articles/765715-grid-gantt-calendar-and-card-views#calendar)Displays tasks that that are date driven as events in a week or month calendar.

To switch between these views, use the **Views** buttons in the top toolbar.

## **Grid View**

Switch to Grid View to work with your data in a spreadsheet.

In Grid View, you can quickly add, move, or update the columns and rows in your sheet. Check out our article on [Inserting and Deleting Rows](https://help.smartsheet.com/articles/504721) for more information.



Grid View (as well as Gantt View) allows you to add formulas to your sheet to calculate values. Details on this process are available in the [Create and Edit Formulas in Smartsheet](https://help.smartsheet.com/articles/2476171) article.

## **Gantt View**

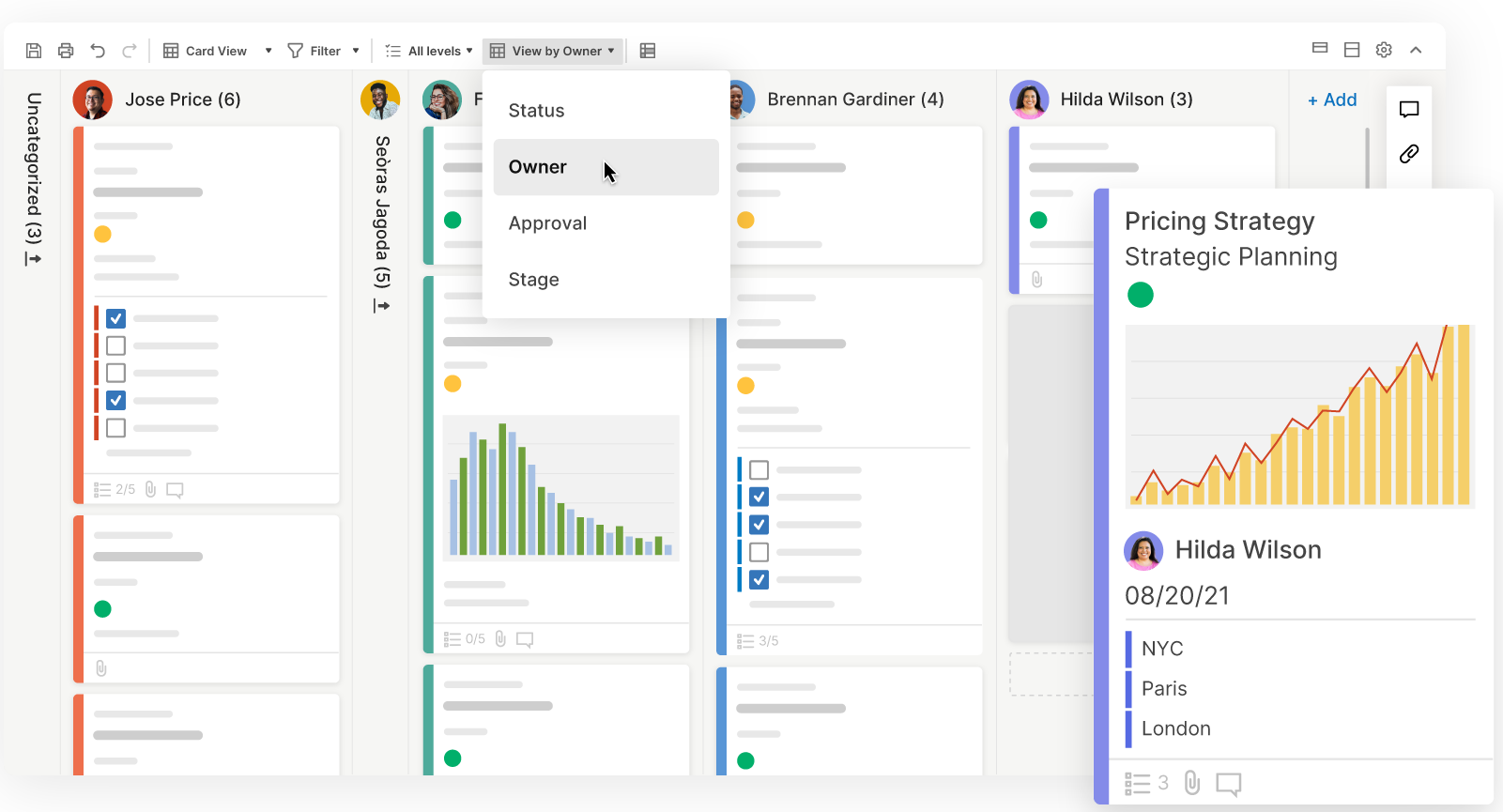
With Gantt View, you can see information in the grid on the left and a corresponding Gantt chart on the right. To use Gantt View, you will need at least two date columns in your sheet or report. Check out our [Column Types](https://help.smartsheet.com/articles/504619#date) article for more information on Date type columns.



Gantt charts are a staple project management resource for visually tracking the duration of and relationships between tasks in a project. Check out the Help Center article on [Working with Gantt Charts](https://help.smartsheet.com/articles/765675) for more information.

## **Card View**

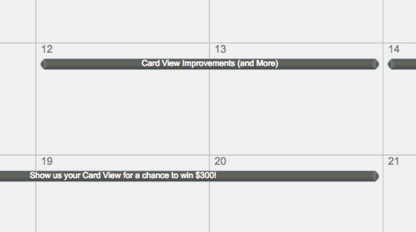
Card View displays your data in a Kanban board (typically used in agile project management). Learn more about Card View in our article on [Using Card View to Visualize Your Project.](https://help.smartsheet.com/articles/2302238)



You must have at least one single-select Dropdown List or Contact List column to use Card View. The values specified for the column become the headers in Card View, called **Lanes**. For more information on using dropdown lists, see [Column Types.](https://help.smartsheet.com/articles/504619#dropdown)

## **Calendar View**

Use Calendar View to get a sense of the number of concurrent tasks you have per day in your project and to identify tasks that overlap across weeks or months. You can view any sheet or report with at least one date column in Calendar View. Check out our [Column Types](https://help.smartsheet.com/articles/504619#date) article for more information on Date type columns.



## **Import files to create new sheets**

You can import any sheet or report from the following formats:

* Microsoft Excel
* Microsoft Project
* Google Sheets
* Atlassian Trello board

To enhance the automation of your data imports, you can import files in two different ways:

* From the top navigation bar, select **File** > **Import.**

You can choose from four options to import your data and four options for automating your data import. For more information on automating your import, see [Create an upload workflow in Data Shuttle.](https://help.smartsheet.com/articles/2482376-create-data-shuttle-upload-workflow)

* From the top navigation bar, select the **Connection** menu **>** **Create workflow** or **Manage workflows** to manage your import automation directly from Data Shuttle.

Import always creates a newsheet. To bring data from other programs into an existingsheet, use [copy and paste.](https://help.smartsheet.com/customer/portal/articles/518318)

Before you import

For successful import, files must meet the following criteria:

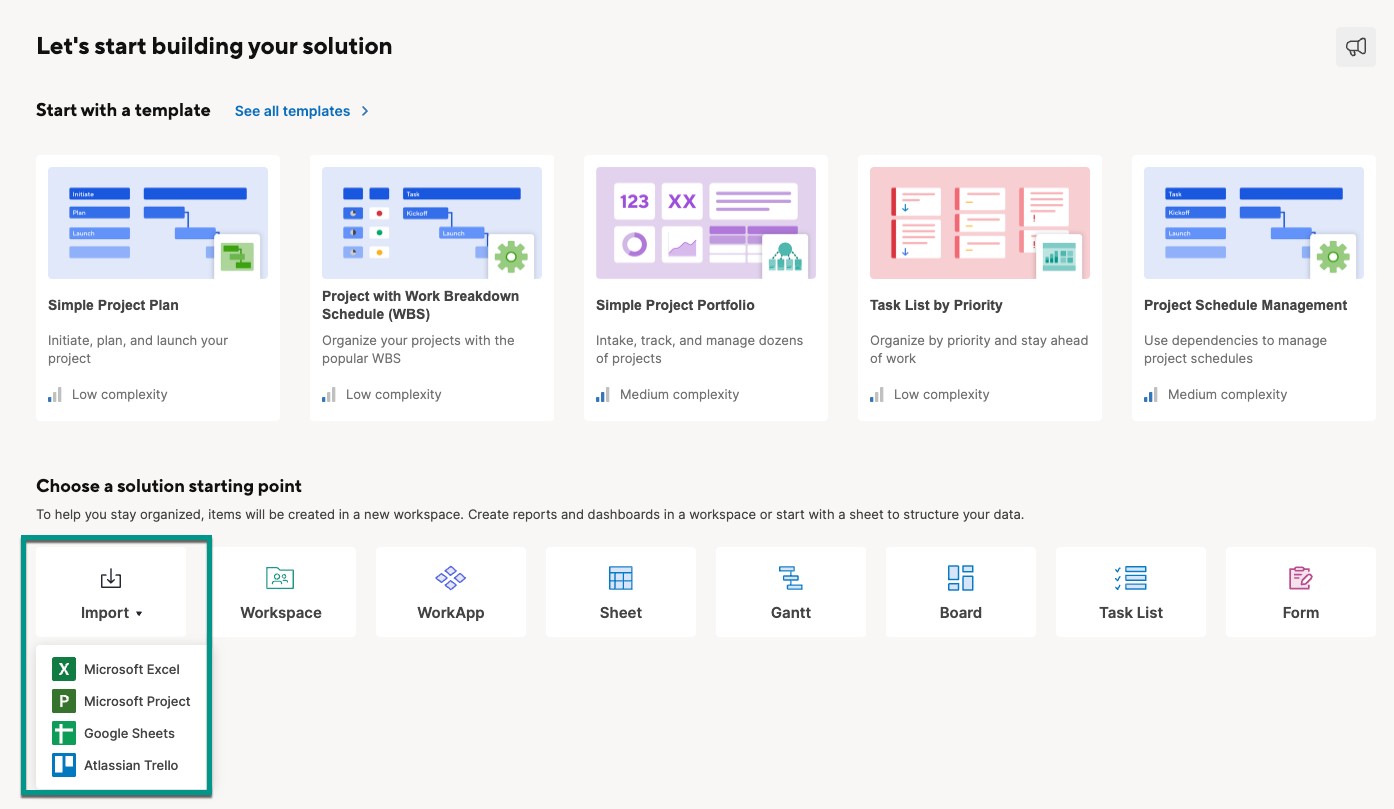
* The file can't exceed 50 MB
* You can import up to 20,000 rows, 400 columns, or 500,000 cells at a time
* Microsoft Excel files must be in .xls, .xlsx, or .csv format, and first tab of the workbook can't be blank
* You must create Microsoft Project files in versions 2007, 2010, 2013, or 2016 and must be in .mpp, .mpx, .mspdi, or .xml format

**Formulas aren't preserved** Due to the differences between Excel and Smartsheet formula syntax, you can't import formulas.

To work around this, you can store formulas as text by removing the equal sign from in front of the formula and then save the sheet. Once you open the Excel file, you can add the equal sign back and modify the syntax to make the formula work in Excel.

### Get started with your import

1. On the left navigation bar, select the **Solution Center** (**plus**) icon **>** **Import.**
2. Select the source application that you're importing from. Brandfolder Image



Smartsheet prompts you to locate and upload the file from your computer.

1. After you've uploaded your file, type a sheet name and [select your Primary column](https://help.smartsheet.com/articles/504645) for the sheet.
2. Select **Import**.

Your imported file appears as a new sheet on **Browse** in the left panel.

You may need to make manual adjustments to the sheet after it's imported to get it to look and function how you want.

You may notice that the system doesn't retain some aspects of your imported items. Common items that may require adjustments include:

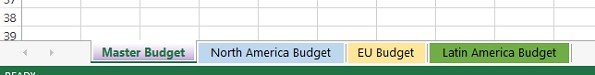
* Capabilities that aren't available in Smartsheet and aren't included in the imported sheet: Merged cells, multiple sheets in a workbook, or cell borders.
* Drop-down lists for [data validation,](https://help.smartsheet.com/articles/2476196) which need to be re-created.
* If you import an Excel sheet or Google Spreadsheet that uses a formula that isn't supported in Smartsheet, an [#UNPARSEABLE error message](https://help.smartsheet.com/articles/2476176) appears in place of the formula.
* Images from an external file.

If your imported sheet doesn't contain the data you were expecting, check for hidden worksheets in your Excel workbook. To import the correct data, un-hide all hidden worksheets and move your desired worksheet to the first position.

Microsoft Project has some features, such as constraints, that aren't supported in Smartsheet, and may cause rows to be out of order when importing .mpp files. To resolve this, try saving the .mpp file as .xml and importing the new .xml copy. If the issue persists, reach out to our support team.

### Import multiple sheets from a Microsoft Excel workbook

Only the first (left-most) worksheet tab of an Excel workbook gets imported. Look at the very bottom of your Excel workbook to see if you have multiple tabs.

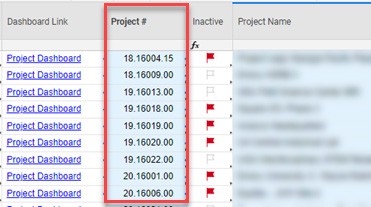


If you have multiple tabs you'd like to import to Smartsheet:

* Import the workbook into Smartsheet once to create a new sheet.
* Go back to the Excel file, select a tab and drag it to the left to move it into the left-most position.
* Save the Excel file, and import it to Smartsheet again. This creates a new sheet based on the information in the tab you just moved into the left-most position.
* Repeat the process until you've created a sheet for each tab in the workbook.
* In Smartsheet, consider moving all of the sheets into a folder or workspace for organizational purposes.

## **Work with the primary column**

### **Overview and best practices**

Every sheet has a primarycolumn. This column is mandatory and you can't delete it from the sheet. The value in this column is, frequently the main descriptor for the row.

When you create a new item in Smartsheet, the primary column is set automatically — in Grid View, it is the left-most column. When you create a new sheet by importing data from another program, you'll be asked to designate the primary column.

To rename the primary column, double-click the column name and type a new name.

Once the primary column is set, you can’t designate another column to be the primary.

If you want to change the contents of the primary column, here's one thing you can do: insert a new column in your sheet, cut and paste the data in the cells from the exiting primary column to this newly inserted column, and then paste the preferred data into the empty primary column.

### **Primary column properties**

With the exception of the column name, you can't change the properties of the primary column. Here's a list of the properties:

* The column name is in bold text (this is the only column name with this property)
* It's the column where you'll see expand and collapse buttons when you create hierarchy in your sheet. For more information about creating hierarchy, see [Hierarchy:](https://help.smartsheet.com/articles/504734)

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[Indenting and Outdenting Rows.](https://help.smartsheet.com/articles/504734)

* The column is always of the Text/Number column type. Auto number or other column types aren't available for the Primary column.
* Text and numbers in the column are formatted as left-justified

### **Primary column name: Best practices**

When you name the primary column, use a descriptive name: Client Name, Task Name, Order Number, Part Number, and so on.

The primary column is used to identify the row when you use features such as **Send row** or **Request update**; using a descriptive name help keep things straight as you communicate about the row or request information from other Smartsheet users.

### **Primary column name in reports**

Because reports can return data from multiple sheets, each having a different primary column name, information from the primary column is consolidated into a single column named **Primary.**

# Hierarchy: Indent or outdent rows

You can create a hierarchy on your sheet by indenting rows. When you indent a row, it becomes a **child** of the row above it (the **parent** row).

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Hierarchy creates relationships between rows, it doesn't control row formatting.

## **Indent a row**

Select on a cell in the first row you’d like to indent, and then select the **Indent** button on the toolbar. The row above it will become the parent row.

**Note** If the **Indent** button is unavailable, you may be trying to indent a blank row. In order to create hierarchy, data needs to exist in *both* the parent, and child rows. Make sure neither row is blank before indenting.

To indent a row, you can also use the keyboard shortcut Ctrl + ] or Command + ] on a Mac.

Indents are displayed only in a sheet's [Primary Column;](https://help.smartsheet.com/articles/504645) however, the relationship is applied to the entire row.

## **Remove hierarchy**

To remove the parent-child relationship, select on a cell in the child row and then select the **Outdent** button on the toolbar.

To outdent a row, you can also use the keyboard shortcut Ctrl + [ or Command + [ on a Mac.

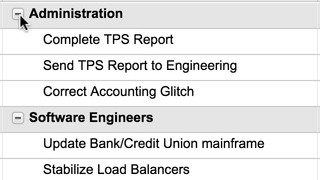
## **Expand or collapse indented rows**

When you expand or collapse rows and then save the sheet, this changes the sheet structure for all collaborators shared to it. Everyone who uses the sheet sees the same rows collapsed and expanded that you do.

To show or hide the indented items beneath a parent row, select **expand/collapse** in the parent row’s Primary Column.

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To expand or collapse all sub-items on a sheet, right-select on the Primary Column header and select **Expand All** or **Collapse All**.

### Hierarchy best practices

Keep the following in mind as you work with hierarchy:

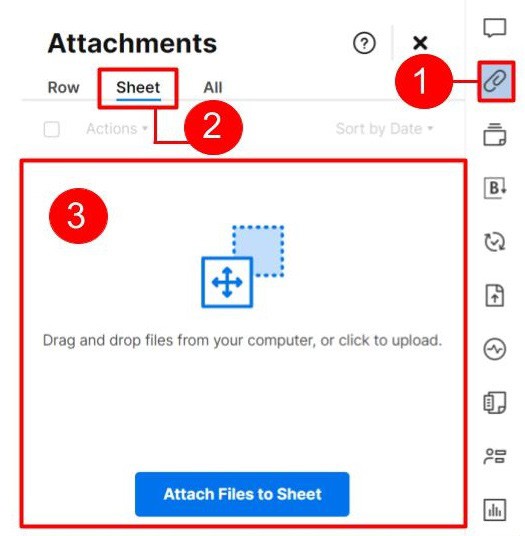
* There is no fixed level of indenting. You can continue indenting rows on your sheet to create multiple levels of hierarchy.
* When you select and drag a row that has items indented below it, the child rows move with the selected item.
* You can’t delete a parent row without also deleting its indented child rows. (To delete the row without deleting the child rows, remove the parent-child relationship first).

## **Attach files to a sheet**

In a sheet, you can attach files to a sheet, row, or comment. In a report, you can attach files to a row.

To attach files at the sheet level

1. Select the **Attachments** icon.
2. Select the **Sheet** tab.
3. Drag any files to the **Attachments** pane, or select the **Attach Files to Sheet** button.



### **To attach files at the row level in a sheet or report**

* Rows that already contain attachments will display the **Attachments** icon to the left of the row number.



* You can only attach files to one row at a time.
* You can't associate any already attached file with a different row or area of the sheet.

1. Select the Attachments icon on the right sidebar.
2. Select the row where you want attach your file.
3. In the **Attachments** pane, select **Attach Files to Row**.

If you’re uploading a locally saved file, drag the file to the row where you want to attach it.

### **Attach files as you comment**

1. Go to the **Conversations** pane.
2. In the lower-right area of the comment box, select **Attachments** .
3. Choose the location of the file.
4. Type your comment and select **Save**.

## **Auto-number rows**

An auto-number system column is useful when you want to automatically include a row ID, a part number, an invoice number, or a customer number without having to type the number in.

### Create an auto-number column

1. To get started, click the drop-down arrow  under any column's header and select **Insert Column Right** or **Insert Column Left**.
2. In theform, click **Auto-Number/System** > **Auto-Numbe**r to reveal the **Display Format** section of the form.
3. To format the number, do either of the following:

To set up a specific numbering pattern, fill in the fields in the **Display Format** section of the form:

* + **Prefix:** Appears before the automatically generated number.

You can use numbers, text, symbols (\*, -, \_ ), and [dynamic date tokens.](https://help.smartsheet.com/articles/1108408-auto-numbering-rows#advanced)

* + **Fill:** Insert a number of 0's to represent the total number of desired digits between the Prefix and the Suffix. 0's will be inserted into the front of each number in the sheet such that each one contains the desired number of digits.
  + **Suffix:** Appears after the automatically generated number.

You can use numbers, text, symbols (\*, -, \_ ), and [dynamic date tokens.](https://help.smartsheet.com/articles/1108408-auto-numbering-rows#advanced)

* + **Starting Number:** Determine where the count will start. By default, it starts at 1.

-or-

Leave the fields blank to assign row IDs that start with 1, and increment by 1 in each row.

The **Auto-Number Preview** field in the form will display the format of the starting number.

The next time you save the sheet, the Auto-Number System column will include a value (as per your specifications in the form) for each row that contains data.

* + You can have only one Auto-Number column per sheet. If the auto-number option isn't available, your sheet already has an auto-number column.
  + If you later make changes to the **Display Format** (e.g., change the Prefix), the new display settings will only be applied to new rows that are saved to the sheet. To apply the new settings to existing rows, delete the Auto-Number column and create a new one with the new Display Format. Make sure to set the starting number appropriately to re-start the sequence.
  + The values in the column are display-only; however, you can apply formatting to the column to change the appearance of the value it contains. Learn more about [formatting options.](https://help.smartsheet.com/articles/518246)

### Turn an existing column into an auto-number column

You can also change an existing column type to Auto-Number. You may want to do this if you already have row IDs, part numbers, etc, listed in the sheet. For example, when an Excel file containing a row ID column is imported to Smartsheet, that column is recognized as a regular text/number column, and no automatic generation of numbers would take place when new rows are added.

Changing the text/number column to an Auto-Number column will preserve any existing column values, so you won't lose any row IDs that have already been assigned.

1. Click the drop-down arrow underneath the column header and select **Edit Column Properties**.
2. Change the type listed in part 2 to Auto-Number/System→ Auto-Number.
3. Use the steps described in the previous section to adjust the **Display Format**.
4. Click **OK**.

Because the existing values are preserved, you won't see any immediate changes. However, the next time you insert a new row, and **Save** the sheet, a number will be generated automatically into the column based on the **Display Format** settings you selected.

Make sure to set the Starting Number in the **Display Format** section such that it continues the existing sequence. If you've already numbered rows 1-355, set the Starting Number to 356.

### Advanced date display options

To dynamically generate date values in the **Prefix** or **Suffix** fields of the **Display Format** section, use the following dynamic date tokens:

* **{YY}** or **{YYYY}** Displays the 2 or 4 digit year that the Auto-Number was created.
* **{MM}** Displays the numeric month (for example 01 for January, 02 for February) that the Auto-Number was created.
* **{DD}** Displays the numeric day of the month that the Auto-Number was created.

The curly brackets are required. The tokens Y, M, and D, are used in all languages. Date tokens reflect Coordinated Universal Time (UTC ) rather than your local time zone. If needed, use the Created (Date) system column to log the timestamp of each row's creation in your own time zone.

Learn more about [using a system column to automatically add information to a row.](https://help.smartsheet.com/articles/1964567)

### Reset the auto-number column

In the event that your numbering schema changes or if the column isn't displaying numbers as expected, you can reset the auto-number column:

1. Select the drop-down arrow  under the column's header and select **Delete Column**.
2. Click **Save** in the top toolbar.
3. Select **File > Refresh.**
4. [Create a new auto-number column](https://help.smartsheet.com/articles/1108408-auto-numbering-rows#create) with your correct values.

When setting the values in your new auto-number column, it's important to set the starting value to 1 to ensure that the column increments from 1 (as opposed to from a value in the prior auto-number column).

1. Save the sheet to populate the column with new numbers.

## **Conditional Formatting**

There are three steps to apply conditional formatting:

1. Set condions for the rule.
2. Define the format applied when the condions are met.
3. Set where you want the format applied.

### **Set conditions for the rule**

The condition determines what triggers the formatting change.

1. On the top toolbar, select **Condional Formang**  .
2. Select **Add New Rule**.
3. Select **<set condion>**

***Things to know about setting conditions***

* Available criteria depend on the column type.
* **For a checkbox column:** The criteria would be **Checked** or **Unchecked**.
* **For a date column:** It might be **in the past** or **in the next [x] days**.
* Smartsheet looks at the numbers in a column formated for percentage as values between 0 and

1. Use decimal values to get the correct comparison, for example 0.25 for 25%, or 0.5 for 50%.

* To further customize your rule, select **define custom criteria** at the top of the criteria box.
* To format rows that do not meet your criteria, select **Apply format when condion is NOT met**.

### **Define the format**

Set up the text format you want to appear when the row meets the conditions you defined.

1. In the **Condional Formang** dialog, select **this format**.
2. Use the pop-up box to style your formang:
   * **Font:** Choose a font style.
   * **Font Size:** Set up the text size.
   * **Task Bar:** If you have a Gant chart, use this to automacally change the task bar color when the row meets the condions you idenfied.
   * **Other formang butons:** Set up the text formats you want to appear. You can select to bold, italic, underline or strikethrough the text, and to change the text or background color

### **Set where you want the format applied**

By default, the format applies to the entire row. To change this, follow this steps:

1. Select **enre row.**
2. Select the column(s) where you want to apply the formula.

If mulple rules have the same condion and formang, Smartsheet consolidates them into a single rule.

1. Select **OK**.

You can edit your conditional formatting rules, clone them, turn them on or off, or delete them entirely. You can also reorder them; rules are applied from top to bottom in the order they appear in the conditional formatting window.

1. To open the **Conditional Formatting** dialog, in the toolbar, select **Conditional**

Managing Conditional

**Formatting**

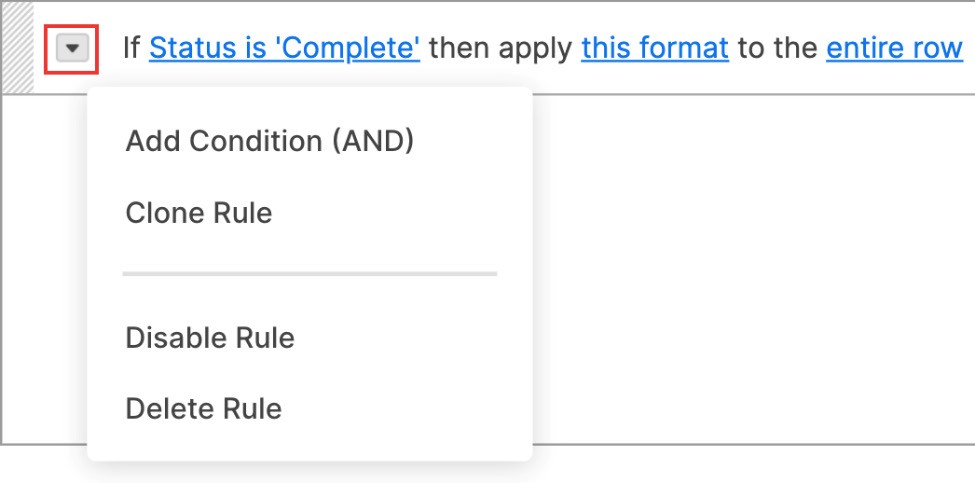
.

2.

Select the drop-

down arrow

.



Formatting Rules in Smartsheet: Editing, Cloning, Enabling, Disabling, and Rearranging

3. Make your selection:

* **Add Condition (AND):** Add more conditions to the rule.
* **Clone Rule:** Duplicate the rule and use it as a template to create new rules.
* **Disable or Enable Rule:** Turn the rule on or off.
* **Delete Rule:** Delete the rule entirely. You can’t undo this, so you may want to remove the rule instead.

Rearrange rules

Rules are applied from top to bottom in the list. If rules conflict, the rule higher in the list takes priority.

To change the order

* Select a rule and drag it to the new location while holding down the mouse button.

## **Create and use filters**

If you have access to a sheet, you can create an Unnamed Filter to view the sheet data in the way that's most useful to you. The configuration of the Unnamed Filter is unique to you.

If you have Editor or higher permissions to a sheet, you can name a filter to save it for later use. If you have Admin permissions to the sheet, you can specify to share the named filter so that anyone on your team with access to the sheet can apply the filter as well.

1. On the toolbar, go to **Filter** > **New Filter.**
2. To create a named filter, fill the **Name** field.

Or,

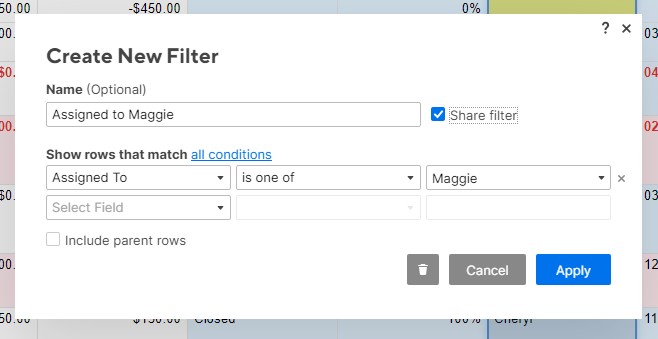
To create an unnamed filter, leave the **Name** field blank.

1. Under **Show rows that match**, select the conditions that you want to apply to the data in the sheet.

The criteria you can select depends on the data type. For example: *contains* can only be used with text strings and contacts, and *is between* can only be used with dates and numbers.

1. Select **Apply** to see the filtering results.

Unnamed Filters appear in the **Filter** menu to indicate that your data is being filtered according to the conditions you specified.



To identify a filter that a sheet Admin has saved to be shared with others, look for the sharing indicator next to the name of the filter.

### Modify a filter

You can always go back and change the conditions of an existing filter:

1. From the **Filter** menu, hover over the name of the filter and select **Edit**.

The title of the form displays the name of the filter that you’re about to modify. Verify the title to ensure that you’re modifying the correct filter.

1. In the **Edit Filter** form, update the conditions as desired
2. Select **Apply.**

The updated filter is applied to the sheet.

If you don’t have Editor permissions or higher, you can only modify Unnamed Filters.

Remove a filter

To stop applying a filter to the sheet, select **Filter Off**.

Delete a filter

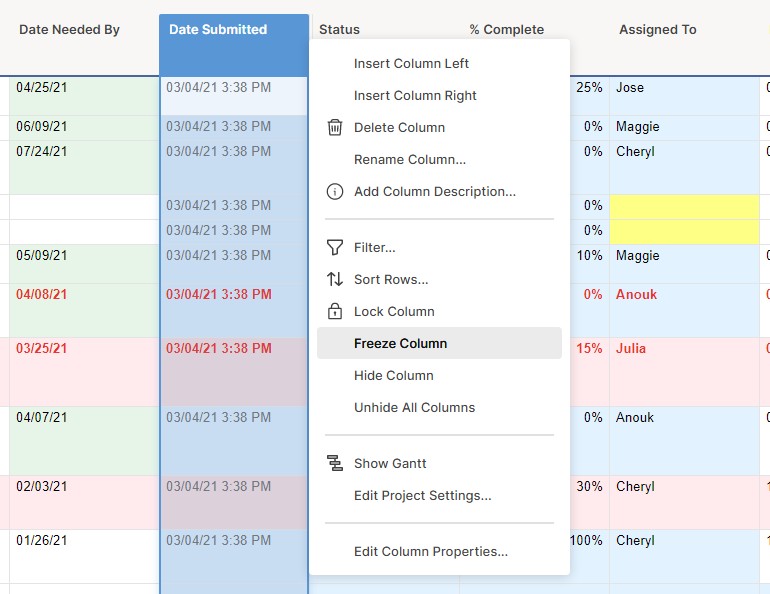
To delete a filter from the sheet and the menu:

1. From the Filter menu, hover over the name of the filter and select Delete.
2. Select Delete.

## **Freeze or Unfreeze a Column**

Freeze a column to keep it visible while the rest of the sheet scrolls left or right.

You cannot freeze rows.



### Freeze a Column

1. To freeze a single column, hover over the column name and then click the **More** icon.
2. Select **Freeze Column** from the menu. The column you selected and any columns to its left will remain visible while columns to the right of it will scroll.

By default, column headers are frozen and always visible when you scroll vertically.

### Unfreeze a Column

• To **unfreeze** a column, click the **More** icon in the column header and select **Unfreeze Column**.

## **Set up a contact list column for assignment**

In Smartsheet, you can use the Contact List column type to assign tasks to team members.

To assign people to tasks on your sheet, the sheet must contain a Contact List column. If it doesn't Contact List column, you can insert one using the following steps:

1. Right click on any column name and select **Insert Column Right** or **Insert Column Left**.
2. The New Column window appears.
3. Type the name of the column in the Name box (for example, type "Assigned To").
4. Select the **Contact List** column type.

If you have tasks that need to be assigned to multiple people, check **Allow multiple contacts per cell**.

In the mobile application, you'll be able to add one or more contacts to a Contact List column depending on which option was set on the web application; however, you can't set this option from the mobile app.

To make certain people easier to add to contact cells in the sheet, you can type a list of preferred contacts into the Add Contacts box —the people that you specify here will appear when you click the dropdown arrow in a cell.

1. Click **OK.**

That's it! The Contact List column is inserted into your sheet. Now you can assign people to tasks.

* You can create filters or build reports to see all of the tasks assigned to specific team members. Learn more about [viewing your assigned tasks.](https://help.smartsheet.com/articles/2482087)
* Insert multiple Contact List columns when people have different roles related to each task.
* You can build alerts to automatically send notifications and requests to people who are assigned to tasks. Learn how to [automate your work with alerts and actions.](https://help.smartsheet.com/articles/2476191)
* You can also use workflows to add contacts to a cell automatically. Learn how to [assign people in an automated workflow.](https://help.smartsheet.com/articles/2482227)

### **Assign tasks to multiple people**

If you want multiple people to work on a task, set up your Contact List column to **Allow multiple contacts per cell.**

Once the column is set up, type the name of an existing contact into a cell to display a list of matching contacts then select the desired contact to add them to the list of contacts assigned to the task.

Keep the following in mind when working with multiple contacts in a cell:

* Each contact must be associated with an email address. If you enter the name of a new contact into a cell, you’ll be prompted to enter their email address as well.
* You can add up to 20 contacts per cell.
* Columns with multiple contacts cannot be used for grouping in a report. Learn more about [configuring grouping to organize results in report builder.](https://help.smartsheet.com/articles/2482082)

You can use capacity view to identify over or under-resourced allocation across your organization, spot availability to take on new work, and forecast hiring needs to make efficient staffing decisions.

### **Restrict assignment to a single contact**

When a task should only be assigned to one person, restrict the Contact Column to a single contact by leaving **Allow multiple contacts per cell** unchecked. For example, with an Approval Request, you'll want to ensure that only one person, such as the manager, approves each step in the process to ensure multiple contacts do not overwrite each other's approvals.

* With a Single Contact column, you can use your preferred contact list to group tasks by assignee if you switch to Card View. Learn more about [card view.](https://help.smartsheet.com/articles/2302238)
* Single Contact Columns can also be used for grouping in a report.
* You can add multiple Contact Columns when people work on different parts of each task.

### **Manage which contacts appear when you type in a cell**

When you type a name or email address in a Contact List column, the names that are displayed will include the following:

* Any preferred contact values that you’ve set up in the Column Properties window.
* All collaborators shared to the sheet.
* Any other contacts or email addresses that have been assigned to other rows in the sheet.
* People in your personal Smartsheet contacts list.
* If you're a part of a Business or Enterprise account, other people that are in the account.

Learn more about [User Management.](https://help.smartsheet.com/articles/795920)

Add contacts to the autosuggest picker

If you start typing a name or email address and aren't seeing the contact list autosuggest, then your contact list doesn't include a contact matching what you've typed. To add them to your Contact List column, click the dropdown arrow in the cell then select **Add New** to add the contact name and email address to your list and assign them to the row. You can also edit the column properties to add them to the preferred contact values.

Remove duplicate contacts from the contact list

You will occasionally see duplicate contacts when you type a name or email address into a cell. To remove names or email addresses from the contact list, remove them from the preferred contact values and other cells in the column.

If you still see duplicate contact values, it’s possible the name you’ve set up for the contact in your personal Smartsheet Contacts does not match the name they’ve associated with their Personal Profile. See [manage contacts in the my Smartsheet contacts list](https://help.smartsheet.com/articles/796143) and [manage your personal profile](https://help.smartsheet.com/articles/2476561) to ensure the name in your contacts matches the name on their profile.

**Working with Symbols**

# Available symbols for the symbols column

The **Symbols** column displays an image to convey a meaning. Use a Symbols column to describe the status of a row or to indicate that something needs your attention for follow-up.

NOTE: You cannot add your own custom symbols to the column.

You can use formulas in a Symbols column. To do this, use the text values of the symbols. For example, to manipulate the value in a Symbols column that uses Status symbols, you might create a formula similar to the following: =IF([Percent Complete]5 = 1, "Full", "Empty"))

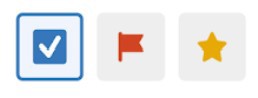
This list shows available symbols, the text values for symbols for use in formulas, and an image of what the symbols look like.

## Checkbox column

Select the checkbox style when you add the checkbox column to your sheet.

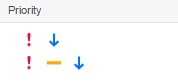
You can't add a star or flag to a row unless at least one other cell in the row contains data.

* Flag
* Star
* Checkbox



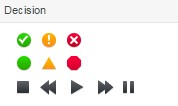
## Priority

* High, Low
* High, Medium, Low



## Decision

* Yes, Hold, No
* Yes, Hold, No
* Stop, Rewind, Play, Fast Forward, Pause



## Status

* Red, Yellow, Green
* Red, Yellow, Green, Blue
* Red, Yellow, Green, Gray
* Sunny, Partly Sunny, Cloudy, Rainy, Stormy
* Empty, Quarter, Half, Three Quarter, Full
* Empty, Quarter, Half, Three Quarter, Full
* Down, Sideways, Up
* Down, Angle Down, Angle Up, Up
* Down, Angle Down, Sideways, Angle Up, Up



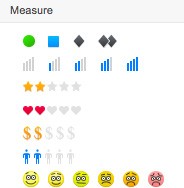
## Direction

* Up, Unchanged, Down
* Down, Right, Up, Left



## Measure

* Easy, Intermediate, Advanced, Expert Only
* Empty, Quarter, Half, Three Quarter, Full
* Empty, One, Two, Three, Four, Five
* Empty, One, Two, Three, Four, Five
* Empty, Quarter, Half, Three Quarter, Full
* Empty, One, Two, Three, Four, Five
* Empty, One, Two, Three, Four, Five
* No Pain, Mild, Moderate, Severe, Very Severe, Extreme



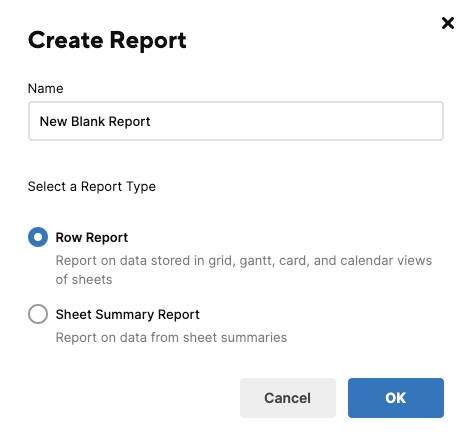
# Building Reports

With a row report you can create filters for relevant information in a sheet, restrict users to editing only the important columns or rows and combine information from multiple sheets into a single report.

You can add rows from multiple sheets into one report with a row report. If you need to add multiple sheet summaries into one report create a [sheet summary report.](https://help.smartsheet.com/articles/help.smartsheet.com/articles/2482086)

## Create a Row report

1. Select the **Browse** tab, then select **Workspaces**.
2. Find the workspace you want the report to live in. Select workspace name to open it.
3. Select **Create**.
4. Select **Report**.
5. Then select the **Row Report** option.



## **Configure the report**

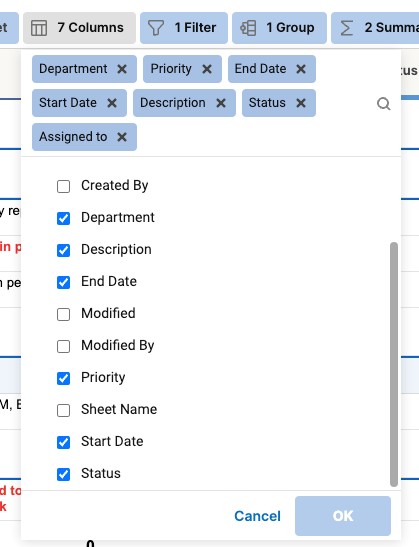
If you are working with large amounts of data, consider applying additional summary filters to the report when you configure it. **Sheet name**, **Created (date)**, and **Modified (date)** can limit the data included and help your reports run more efficiently.

### Source Sheets

Source sheets are the sheets you want to pull in data from for the row report. You can have up to 30,000 source sheets for the report. You cannot use reports as source sheets for other reports.

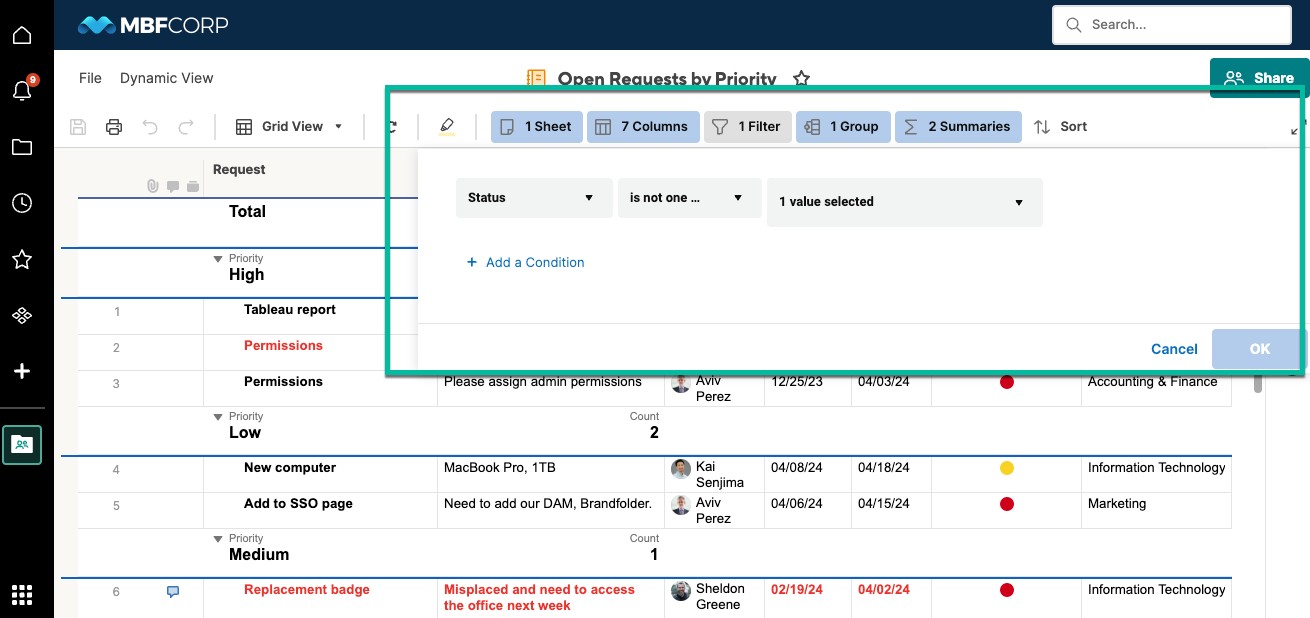
### Columns displayed

In the columns displayed dropdown, select the columns from your source sheets that you want to add to your report. You can have up to 400 columns selected. Brandfolder Image



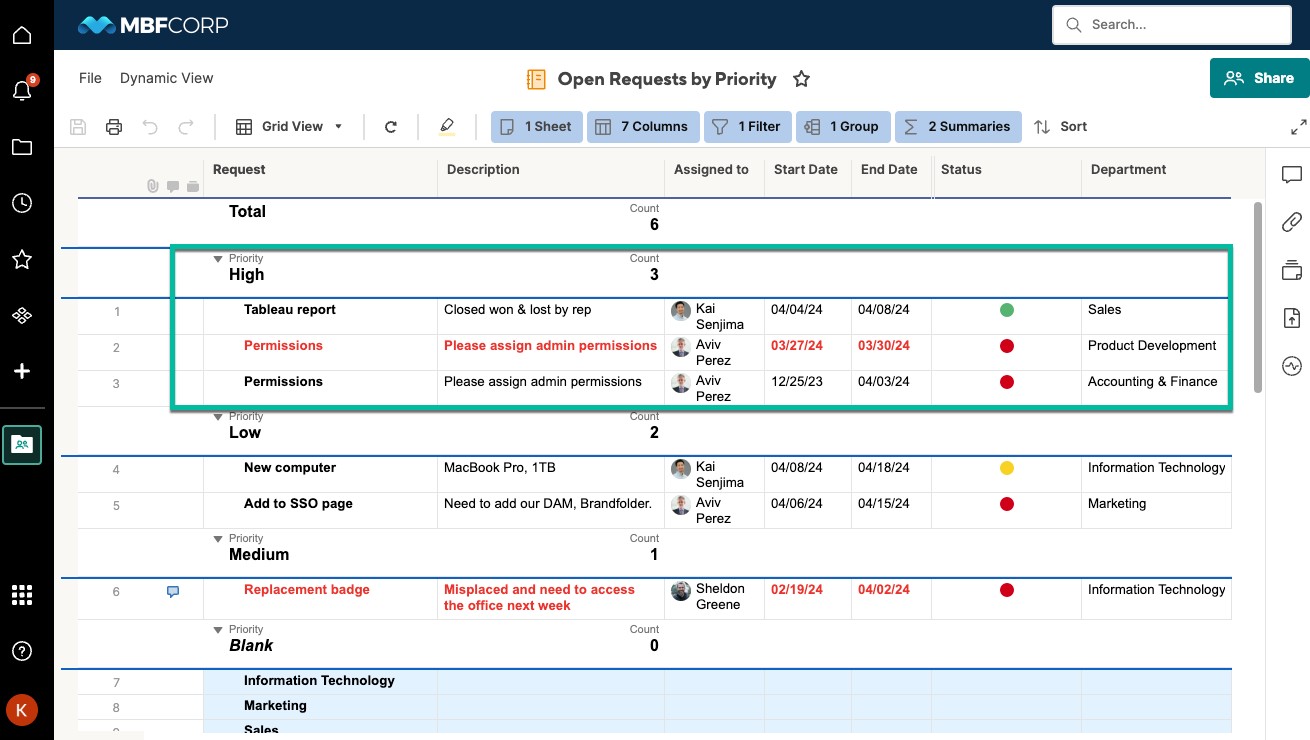
## **Filter criteria**

Set filter criteria to filter the data that gets pulled into your report from the source sheets. Only the data that meets your filtering criteria will be displayed in the report. Brandfolder Image



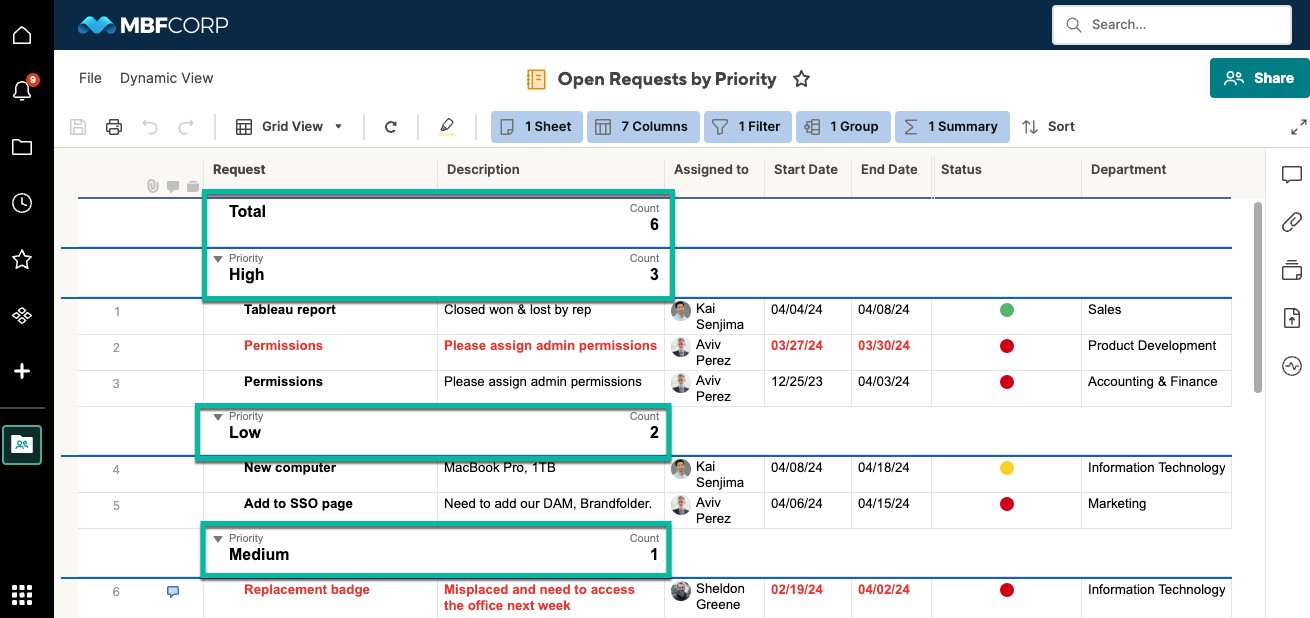
## **Group**

Organize your data into groups which help you easily access the information you need. Brandfolder Image



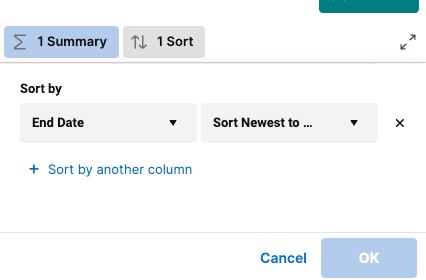
### Summarize

Summarize your data by defining key metrics to help you make informed decisions. Summary data is always displayed in the grouping row and cannot be formatted differently. Brandfolder Image



## **Sort**

Sort the data in each group in a particular order: Oldest to Newest or Newest to Oldest.



## Create your workflow

Building an automated workflow is similar to building a flowchart. You place **triggers, conditions, and actions** together from a start block to one or more end blocks.

You can build your own workflows from scratch or customize existing templates for your purposes. The workflow template gallery includes tips on when to use the workflow and how to customize each template.

|  |  |
| --- | --- |
| **Use a Workflow** | **To do this** |
| **Alert someone when specified criteria are met** | Let someone know you’ve assigned them a task or changed a date. |
| **Remind someone on a specific date** | Remind stakeholders as critical dates approach. |
| **Request an update every week** | Collect weekly status reports and keep projects updated. |
| **Move a row to another sheet when specified criteria are met** | Automatically move rows to another sheet when something changes, like when someone  completes a task, updates a status, or assigns a team a new task. |

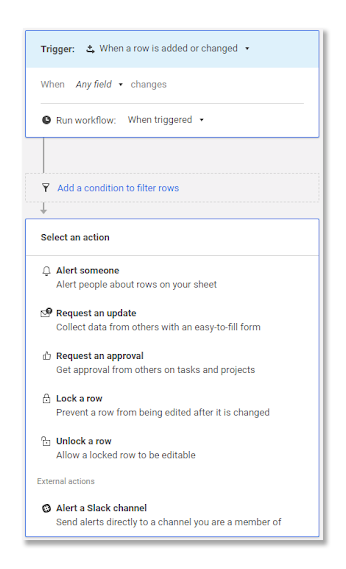
What you can do and where you can apply workflows depends on your permission level. Learn about [workflow permissions.](https://help.smartsheet.com/articles/2479226-permissions-required-to-create-and-edit-automated-workflows)

Access the template gallery:

* In the upper-left corner of your sheet, select **Automation** > **Create workflow from template...**

Create a workflow from scratch:

In the upper-left corner of your sheet, select **Automation** > **Create workflow...**



Workflows are formed by:

* [**Trigger blocks**:](https://help.smartsheet.com/articles/2479236-trigger-blocks-define-when-your-workflow-is-executed) Define when your workflow is executed.
* **Condition paths**: A line that connects blocks to depict different routes that your workflow may take depending on the conditions you set. Your workflow may have a single path from trigger to action or it may have several paths to different actions based on preceding conditions.
* [**Condition blocks**:](https://help.smartsheet.com/articles/2479251-condition-blocks-filter-what-your-automated-workflows-send) Define conditions to filter which rows to include in an alert or action.

[**Action blocks**:](https://help.smartsheet.com/articles/2479246-action-blocks-specify-what-kind-of-automation-is-triggered) Choose what type of automation you want your workflow to perform when triggered.

### Customize your workflow

Select **Add**  to insert new paths and blocks to the workflow to meet your needs.

* **Add a condition:** Filter the rows included in the workflow path.
* **Add a new condition path:** Define an alternate route for your workflow to take if the first condition isn't met.
* **Add an action:** Define what you want your workflow once it meets your conditions.

Keep the following in mind:

* With multiple paths, the workflow evaluates each condition block in sequence from left to right. The leftmost condition block that the row meets defines the path the row takes through the workflow.
* Add at least one action block at the end of each path. After an action block, you can define additional conditions and paths as long as another action block follows.
* Unlike formulas, workflows take a few seconds to process. Emails, update/approval requests, move row automations on large sheets, and older workflows that haven't been recently modified may take a few minutes to complete.

To prevent infinite approval loops, cells that contain [cross-sheet formulas](https://help.smartsheet.com/articles/2476606) or [cell links](https://help.smartsheet.com/articles/861579#Inbound_Outbound_Links) don't trigger an automation which automatically changes the sheet (Move Row, Copy Row, Lock Row, Unlock Row, Approval Request). To work around this, consider using [timebased automation](https://help.smartsheet.com/articles/2479241) or [recurrence](https://help.smartsheet.com/articles/2479396) workflows.

### Limitations

* Each sheet can have up to 150 workflows.
* Each workflow can have up to 100 blocks. This includes the trigger, condition, and action blocks.
* Each workflow can have up to 30 Action blocks.
* Condition blocks can have up to 20 condition statements (20 lines within the block).

Attachment links included in Automated Workflow emails expire after 14 days.

### Best practices for workflows

* Type a name for your workflow in the upper-left corner of the workflow builder.
* Save your workflow after set up or after any change. You can come back and make further changes to your workflow at any time.
* Set your trigger to take place an hour before the action should take place. This ensures that technical issues don't prevent the action from taking place on time.
* The more active workflows you have on a sheet, the slower the workflows are. To improve performance, combine workflows that are triggered together and deactivate older workflows that aren't needed.
* Edit, clone, or delete workflows after you’ve saved the workflow, you see it listed on the Manage Alerts & Actions window. Select **Automation > Manage**

**Workflows...** In this window, you can deactivate (or activate), edit, clone, or delete a workflow.

* When you clone a workflow, make sure you modify any approval requests so they’re either stored in a new column or use new values when approved or declined. If you don't change the configuration of approval requests in the clone, approvals in your original workflow may trigger approval requests in the new workflow.