



INFORMATION TECHNOLOGY
Enterprise Application Systems

Smartsheet Navigation Guide

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Accessing Smartsheet

It is required to get a sheet shared from one of Mt. SAC Smartsheet administrators to access Smartsheet but once you received the smartsheet email invite and logon using the Company Login link you can Login using your Mt. SAC single sign on (SSO).

1. Open the Smartsheet email invite and click the log in button on the email. Click on the Company Login button of the Smartsheet Login screen and sign in using your Mt. SAC single sign on (SSO) credentials.

The image shows an email interface with a message from Hector Garcia via Smartsheet. Below the email header is a Smartsheet logo and a green 'Log In' button. The email body contains the text: "Here's your assigned Standard A on 'Accreditation 2016'". Below the email is a screenshot of the Smartsheet login page. The login page has a title "Smartsheet Login" and two main sections. The left section has input fields for "Email: *" and "Password:", a checkbox for "Remember Me", and a blue "Log In" button. A large red circle with a diagonal slash is overlaid on this section. The right section has the text "Use your Mt. San Antonio College company account to login" and a blue "Company Login" button. An arrow points to this button. Below this are links for "Don't have a Smartsheet Account yet? Sign up" and "Or log in with:" followed by a Google logo and a link "Use my Google account". At the bottom of the left section is a link "Forgot your password? Reset it".

2. Returning users go to <http://smartsheet.mtsac.edu> and sign in using your Mt. SAC single sign on (SSO) credentials.

The image shows the login page for Mt. San Antonio College's SSO. The header is dark red with the Mt. SAC logo and the text "Mt. San Antonio College Celebrating excellence and distinction!". Below the header, the text "Log in to sso.smartsheet.com" is displayed, followed by a yellow highlighted box containing "(Use my.mtsac.edu login/password)". The login form consists of two input fields: "Username" and "Password". Below the "Password" field is a red "Login" button. To the right of the "Username" field is a link "> Forgot your password?".

SMARTSHEET

Smartsheet Navigation

The homepage of your Smartsheet account allows you to see all the sheets and workspaces you have access to.

The screenshot shows the Smartsheet homepage. On the left is a navigation sidebar with options like 'Account', 'Home', 'Favorites', 'Sheets (3)', 'Workspaces', and 'Resource Views'. The main area displays a list of sheets under the heading 'Sheets'. The list has columns for Name, Sharing Status, Owner, and Last Update. Three sheets are listed: 'Accreditation 2016', 'Accreditation Training', and 'Mt SAC IT Project List', all with a 'Shared' status. A yellow callout box points to the 'Account' link in the sidebar with the text: **Account**
Change personal settings and manage contacts. Another yellow callout box points to the 'Accreditation 2016' sheet in the list with the text: **Open Sheets**
Double-Click on any sheet to open it.

Sheets as tabs; Toggle between sheets you have access to without having to close them.

The screenshot shows an open Smartsheet spreadsheet. The browser address bar shows 'https://app.smartsheet.com/b/home'. The spreadsheet has columns for 'Standard', 'Sub Standard ID', 'SubStandard', and 'Sub Standard Narrative'. It contains data for four standards: Standard I (Mission, Academic Quality and Institutional Effectiveness, and Integrity), Standard II (Student Learning Programs and Support Services), Standard III (Resources), and Standard IV (Leadership and Governance). A yellow callout box points to the 'Save' icon in the top right of the spreadsheet area with the text: **Save**
Save your sheet by clicking the save icon. Another yellow callout box points to the 'Full Screen' button (four arrows) in the bottom left of the spreadsheet area with the text: **Full Screen**
Click on the four-arrows button to expand the sheet to full screen. At the bottom of the spreadsheet, there is a toolbar with icons for 'Sharing (5)', 'Alerts', 'Attachments', 'Discussions', 'Update Requests', 'Web Forms', 'Publish', and 'Smartsourcing'. A yellow callout box points to the 'Alerts' icon with the text: **Alerts**
Click Alerts to set up your own notifications and reminders, allowing you to receive emails when changes are made to specific columns..

Smartsheet Navigation within Sheets

Every time you open a sheet it opens as a new tab giving you the flexibility to switch between sheets without having to open or close them.

Attach Files

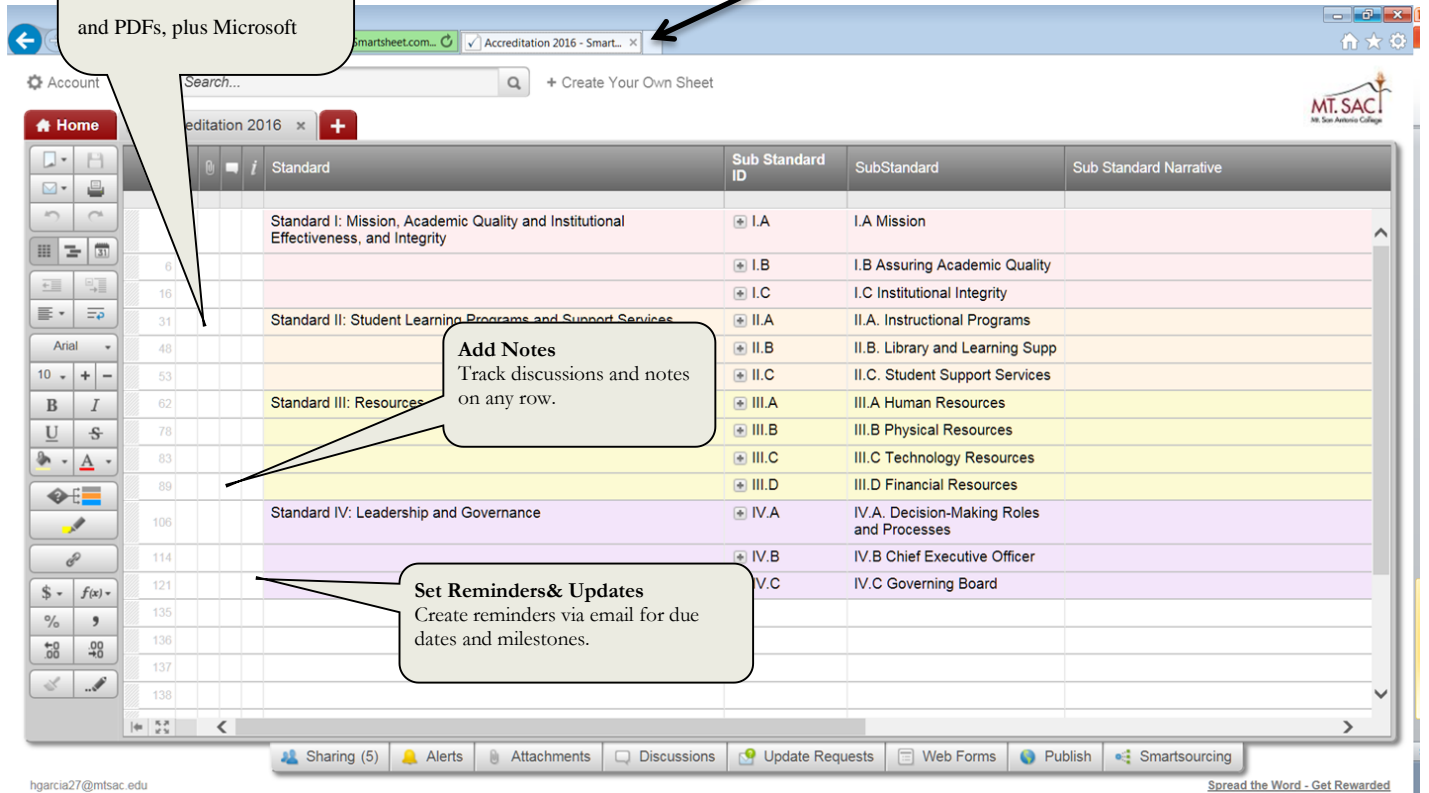
Most of file types are supported, including Images and PDFs, plus Microsoft

Add Notes

Track discussions and notes on any row.

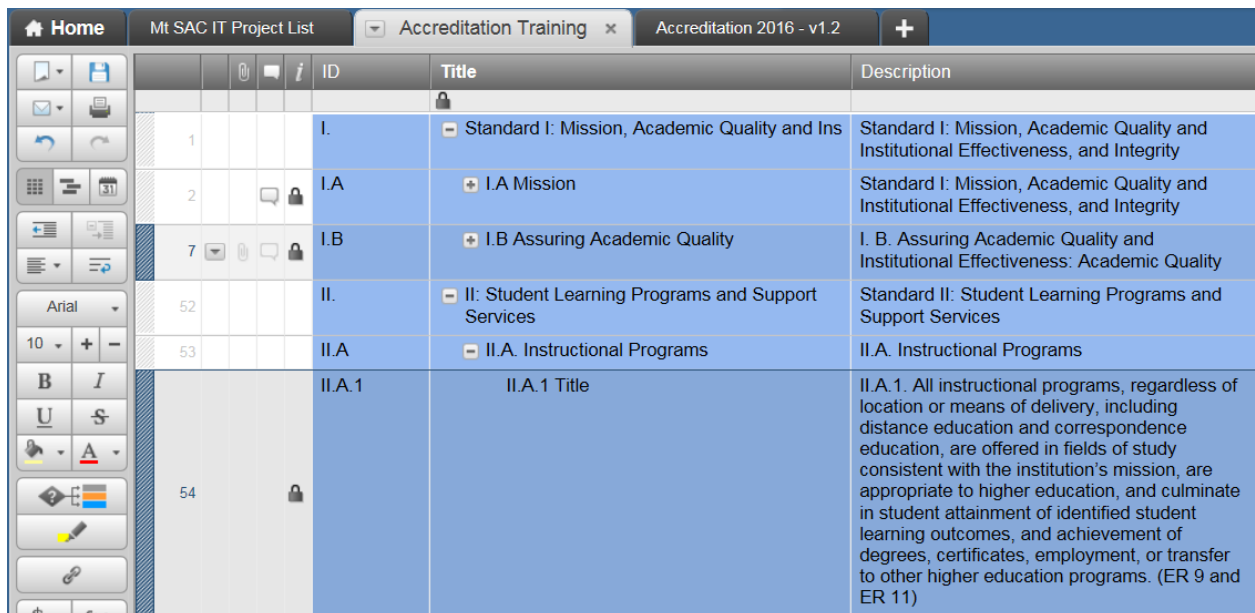
Set Reminders & Updates

Create reminders via email for due dates and milestones.



Locking and Unlocking a Columns or Rows

If you want to protect key data from being changed by those shared to your sheet as Editors, you can lock and unlock columns or rows. A lock can be applied to any column or non-blank row.



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To lock a column right-click the column header then select **Lock Column** and to lock a row right-click the row number then select **Lock Row**. A lock icon will be displayed in the column or row headers to indicate that a column or row has been locked.

There are three rules for the lock feature:

- 1) Only the sheet owner or admins can lock or unlock columns/rows on a sheet
- 2) The sheet owner and admins can still edit locked columns/rows
- 3) Editors can see locked columns/rows, but they can't edit the data in them. The same is true for anyone working from an **Update Request** or **Published** sheet.

The attachment and discussion columns cannot be locked.

To unlock a column or row click the **Lock** icon in either the row's lock column or the column header. A message will appear asking you confirmation to unlock it.

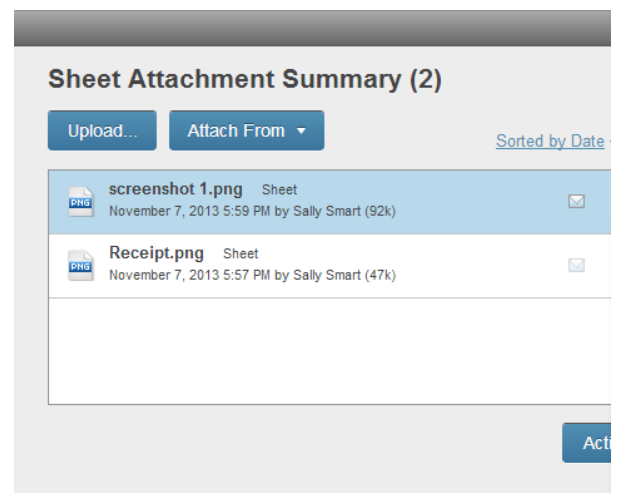
Alternatively, you can right-click either the row's number or column header and select **Unlock Column** or **Unlock Row** respectively.

Attachments

You can attach almost any type of file to a workspace, sheet, row, or discussion. The vast majority of file types are supported, including Images and PDF; and Microsoft Word, Excel, and PowerPoint.

1. Determine a location for your attachment (row, discussion, sheet or workspace):
 - To attach a file to a *workspace*: Click the **Home** tab, and then click the workspace name from the left panel. Click the **Attachments** tab at the bottom of the right panel.
 - To attach a file to a *sheet*: Open the sheet, then click the **Attachments** tab at the bottom.
 - To attach a file to a *row*: Click the row's paperclip icon and select **Upload**.
 - To attach a file to a *new discussion*, click the row's **Discussions** icon or the sheet's **Discussions** tab at the bottom of the sheet then click the **Upload** link underneath to add an attachment to it.
 - OR click on an existing discussion, and use the **Upload** link underneath to include an attachment (attachments can't be added to existing discussion comments).
2. The **Attachments** form appears:
3. Click the **Upload** button. The **Select file to upload** form appears.
4. Locate the file you want to upload, and then click **Save**. You can upload multiple attachments at once by holding down the [Shift] or [Ctrl] key, and then clicking on the file names. The file attachment is added to the desired area. Rows containing attachments will have a paperclip icon in the Attachments column.

*You can also drag-and-drop files from your computer's files into the **Attachments** window to upload them to Smartsheet.*

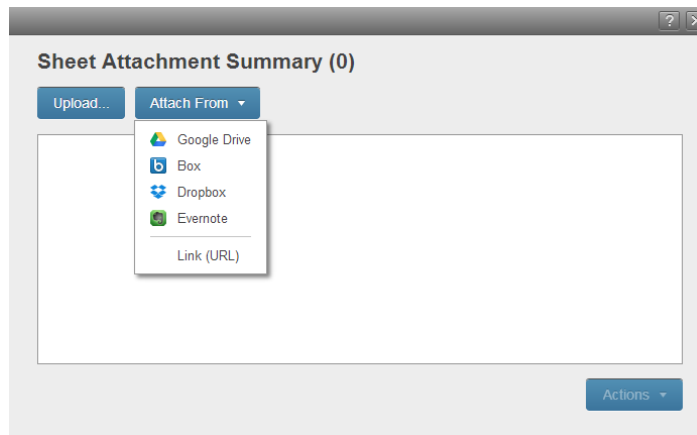


5. After adding the attachment, you and collaborators with the appropriate permission can view, upload a new version or delete it.

Adding items from Google Drive, Dropbox, Box, Evernote or URL

Owners and collaborators with *Editor* or *Admin* access to the sheet or workspace will be able to add attachments from their *Google Drive*, *Dropbox*, *Box* or *Evernote* account.

Follow previous Attachments instructions steps but on step # 3 click **Attach From** and select from the list of choices (Google Drive, Dropbox etc.) and continue attaching the desired files on the Attach From screen.

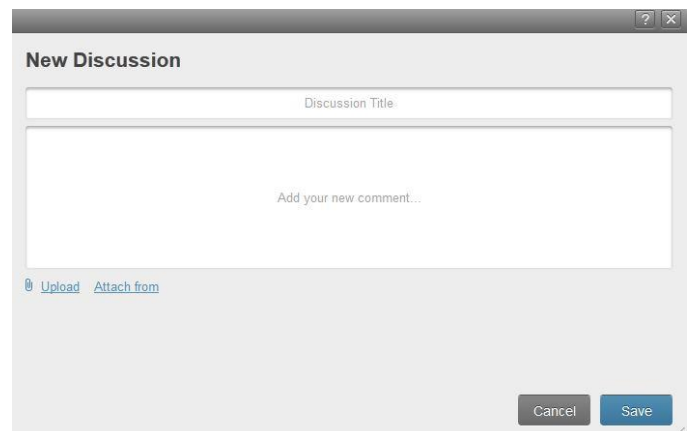
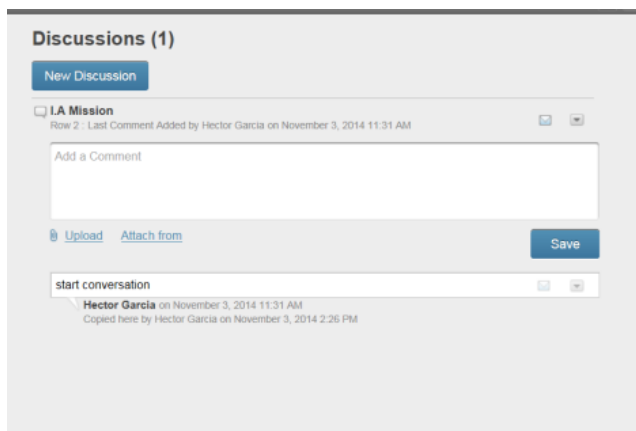


A pop-up window will appear enabling you to login to the account first. You'll only need to enter this information the first time you attach a file from this source - it will be saved the next time you add an attachment from the same place.


Discussions

Discussions provide a way to track comments about a workspace, sheet, or row.

- Determine the location of the new discussion:
 - To add a discussion to a *workspace*: From the **Home** tab, click on the name of the workspace from the left panel. Next, click the **Discussions** tab that appears at the bottom of the right panel.
 - To add a discussion to a *sheet*: Open the sheet, then click the **Discussions** tab at the bottom.
 - To add a discussion to a *row*: Click the drop-down arrow to the right of the row number and select **Row Discussions**.
- The Discussions form appears, listing all existing discussions or click **New Discussion** to enter a new one. The **New Discussion** form will appear.




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3. Enter the **Discussion Title**, and then the actual discussion into the **Add your new comment** field. **TIP:** Click **Upload** to add an attachment to the discussion comment, or **Attach From** to attach a link to a URL, Google Drive, Evernote, Dropbox or Box file.
4. Click **Save** to add the discussion to the desired area. Rows containing discussions will have a word bubble icon  in the Discussion column.
5. After adding the discussion, you, and collaborators with the appropriate access will be able to view, print, and add comments to it.

After adding the discussion, you, and collaborators with the appropriate access will be able to view, print, and add comments to it.

Reminders

Reminders are automatic emails that are set to remind you, or your team members who are shared to the sheet, of tasks that are assigned. They can be sent on a specified date or based on a date column in your sheet, however, you can't select the time of day the reminder will be sent. Reminders can be set on individual rows or for an entire sheet.

To set up a Reminder for an individual row, click the drop-down arrow  next to the row number and select **Set Reminder**.

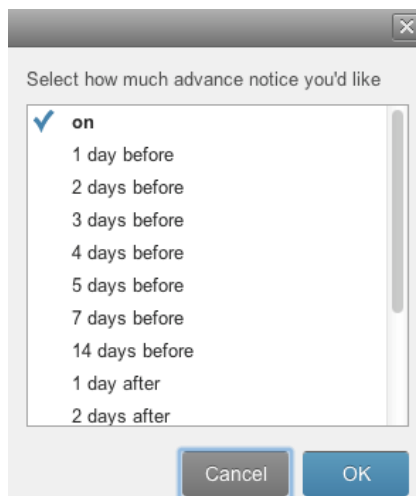
To set up a sheet-level reminder, click the **Alerts** tab at the bottom of the sheet. Sheet-level reminders are applied to every row in the sheet, including rows that are added later.

The **New Reminder** form appears.

1. By default, only you are selected to receive this reminder. Sheet owners and Admins can click **me** to set this reminder for other collaborators. A form appears displaying all sheet collaborators and contact-list columns. Select who is to receive this reminder and click **OK**.

NOTE: When you select a [contact-list column](#) as the recipient, the reminder will be sent to the person listed in the contact-list column for that row.

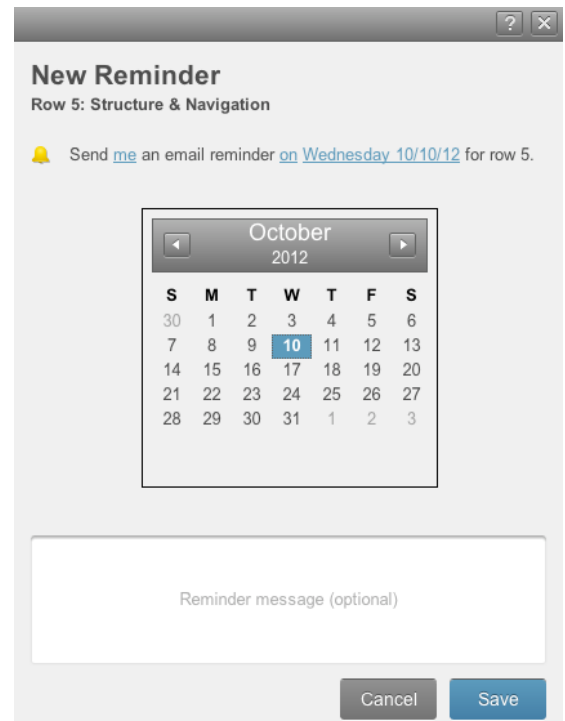
2. By default, the row reminder will be sent **on** the date selected in the **New Reminder** form. Click **on** to set a different date, such as one day before or one day after. A list of choices will appear.
3. Select an option and click **OK**.



Select how much advance notice you'd like

- on
- 1 day before
- 2 days before
- 3 days before
- 4 days before
- 5 days before
- 7 days before
- 14 days before
- 1 day after
- 2 days after

Cancel OK



New Reminder

Row 5: Structure & Navigation

Send me an email reminder on [Wednesday 10/10/12](#) for row 5.

October 2012

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Reminder message (optional)

Cancel Save

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4. By default, the reminder is set to be sent on **today's date**. Use the calendar to select a different date, or click the date link to select a date column in the sheet, such as the **Start** or **Finish** date.

Reminders won't be sent on the same day they're created - make sure to change the default date to one in the future to ensure it is sent out.

5. Enter a reminder message in the text field below the calendar, if necessary.
6. Click **Save**. A reminder email will be sent to the selected recipients on the date specified.

*Reminders can only be created for, and by, collaborators who are shared to the sheet. All users can set up reminders for themselves, but only the sheet owner and collaborators with Admin access to the sheet will be able to set them up for others. All reminders available to you can be reviewed and/or deleted by clicking the **Alerts** tab at the bottom of the sheet.*

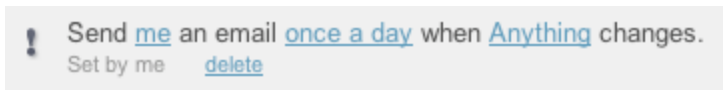
Notifications

Notifications are automatic emails that are sent when changes are made to a sheet. Create a new notification to receive these types of emails, which include the information that has changed (with changed data highlighted) and the names of the collaborators who made the changes.

The notification will only include changes made by other users. You won't receive notifications for changes you make.

All users can create and edit notifications that are being sent to themselves. Only the sheet owner and collaborators with Admin access to the sheet will be able to create or edit them for others.

1. To get started, click the **Alerts** tab at the bottom of the sheet. The **Notifications** form appears listing existing editable Notifications.
2. Click **New Notification**. By default, the Notification email will be sent only to yourself, once a day, listing all changes made to the sheet by other collaborators. Each underlined phrase can be modified

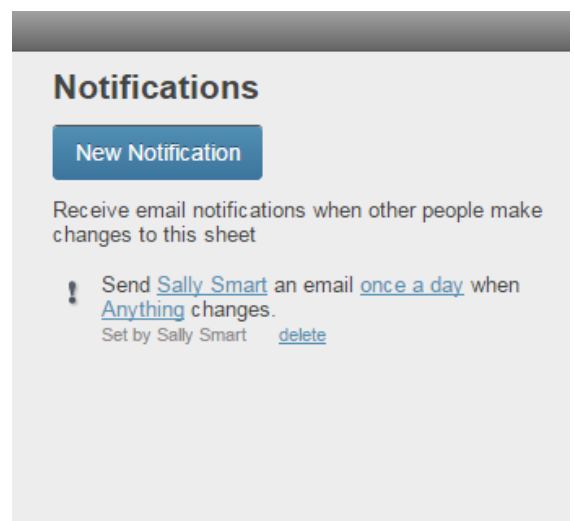


! Send me an email once a day when Anything changes.
Set by me [delete](#)

3. Click the first link in the notification (**me**) to edit to whom it is sent. You can opt to have it sent to all collaborators, certain collaborators you select, or just yourself.

NOTE: A Notification will only be sent to collaborators who've logged into Smartsheet at least once.

4. Click the second link in the notification (**once a day**) to edit the frequency it is sent. You have four choices as to when these notifications are sent: **right away** (within 5 minutes of change), **once an hour**, **once a day** or **once a week**. If you select **once a day** or **once a week**, these changes are compiled every night between 2 and 5 a.m. based on your time zone setting, and then sent out via email.
5. Click the third link in the notification (**anything**) to select what type of changes will trigger a notification email. You can alter this to be notified only on changes made to certain columns, to attachments, sharing settings, and/or discussions.



Notifications

[New Notification](#)

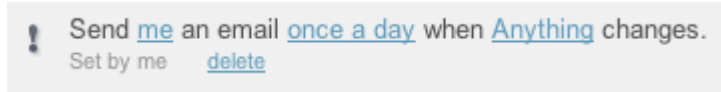
Receive email notifications when other people make changes to this sheet

! Send Sally Smart an email once a day when Anything changes.
Set by Sally Smart [delete](#)

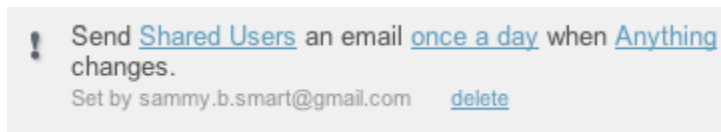
Turning Off Notifications

There are three ways to turn off notifications:

1. Open the sheet and click the **Alerts** tab at the bottom. Click the **delete** link underneath to turn the notification off.



2. If the notification is sent to multiple collaborators, click **Shared Users** and remove yourself from the form that appears.



3. To turn off a notification directly from the email itself, click the **Turn it Off** link near the bottom.

Don't want to receive this notification? [Turn it off](#)

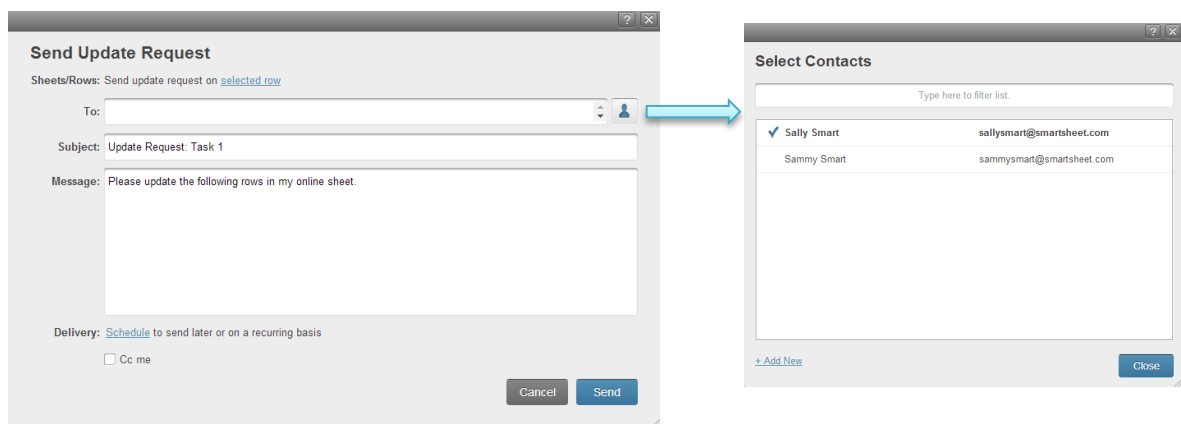
All collaborators can turn off notifications sent to themselves, but only the sheet owner, and collaborators with Admin access to the sheet will be able to turn them off for others.

Update Requests

The sheet owner and collaborators with Admin or Editor access to a sheet can send **Update Requests** to others via email. Update requests are a good way to get a quick update from other people because the recipient will receive an email with a link they can click to edit the information without being required to sign into Smartsheet.

To send an Update Request for a row (or multiple rows):

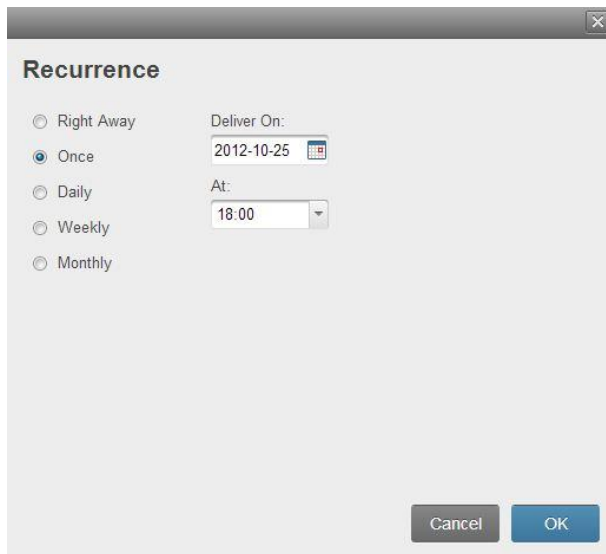
1. Highlight the row to be updated by clicking its row number. To highlight multiple rows, hold down the [Shift] or [Ctrl] key on your keyboard as you click the row numbers.
2. Click the drop-down arrow next to one of the highlighted rows and select **Send Update Request**.
3. The **Send Update Request** form appears:
4. Type in the email address of the recipient. You can send the request to multiple recipients by separating their email addresses with a semi-colon or



if you've added contacts to your Smartsheet Contact List, click the collaborator icon to the right to check off the contacts who should receive the Update Request. Team/Enterprise users will also be able to choose from other members of their team.

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5. The **Subject** line and email **Message** will contain default values and you can edit either as needed.
6. Click **Schedule** to send the update request on a recurring daily, weekly, or monthly basis, or to schedule the request for a later date.



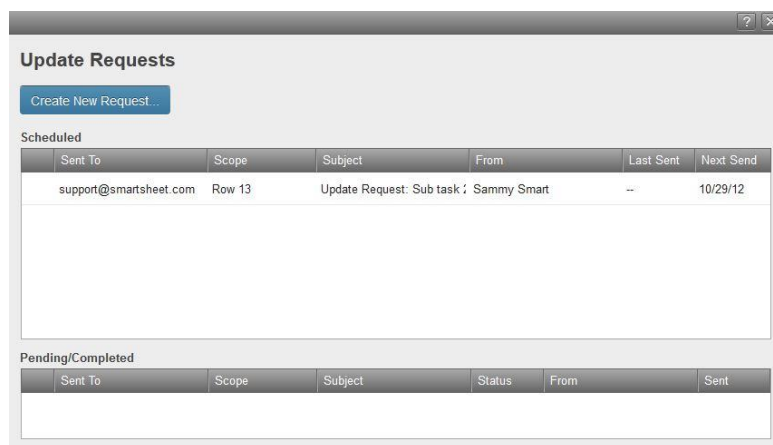
A dialog box titled "Recurrence" with a close button (X) in the top right corner. On the left, there are five radio button options: "Right Away", "Once" (which is selected), "Daily", "Weekly", and "Monthly". To the right of these options, there are two input fields: "Deliver On:" with a date picker showing "2012-10-25" and a calendar icon, and "At:" with a time dropdown menu showing "18:00". At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

7. After clicking OK, the recurrence parameters now appear in the Delivery field of the Send Update Request form.

When the recipient submits their changes, your sheet will be updated automatically and you'll receive an email confirmation showing what was changed.

To send an Update Request for the entire sheet:

1. Click the **Update Requests** tab at the bottom of the sheet. **NOTE:** Make sure you don't have a cell or row highlighted when you click the **Update Requests** tab or a row-level Update Request will be created. Click on a column's header to quickly de-select cells/rows.
2. If this is your first Update Request for the sheet, the **Send Update Request** form appears. Otherwise, you will see previously sent Update Requests listed in this tab, and can send a new one by clicking the **Create New Request** button (screenshot below) and follow steps 3-7 above.



A screenshot of the "Update Requests" tab in a spreadsheet application. At the top, there is a "Create New Request..." button. Below this, there are two sections: "Scheduled" and "Pending/Completed".

The "Scheduled" section contains a table with the following data:

Sent To	Scope	Subject	From	Last Sent	Next Send
support@smartsheet.com	Row 13	Update Request: Sub task 1	Sammy Smart	--	10/29/12

The "Pending/Completed" section contains an empty table with the following headers:

Sent To	Scope	Subject	Status	From	Sent
---------	-------	---------	--------	------	------

*The **Update Requests** tab at the bottom of the sheet displays a list of all completed and pending update requests sent from the sheet. You can modify and delete recurring scheduled update requests and also delete any that are pending but completed requests can't be deleted.*

Using/Getting Help

Smartsheet has several kinds of help that can give you immediate program and online assistance:

- Help Center help.smartsheet.com
- Help Videos smartsheet.com/videos/all
- Tips click ? Help / Show Tips
- Single Sign On (SSO) Help [What you use to logon to your computer at Mt. SAC]
- Online Support Request. help.mtsac.edu self-service portal.
- Email. helpdesk@mtsac.edu
- Call us. (909) 274-4357