

Navigating Smartsheet

This Job Aid will assist your navigation within View-Only Smartsheet publications.

Dashboard

When accessing the Reports Catalog Offerings Dashboard, refer to the Reports Catalog Change Log to view updates that have been made.

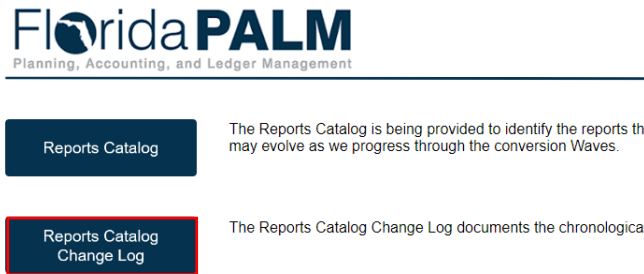


Figure 1: Reports Catalog Offerings Dashboard

Icon Bar

The Icon Bar consists of the following accessible icons:

Print Icon - Allows the sheet to be printed with a comprehensive list of options:

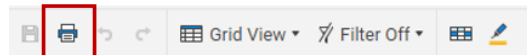


Figure 2: Print Icon

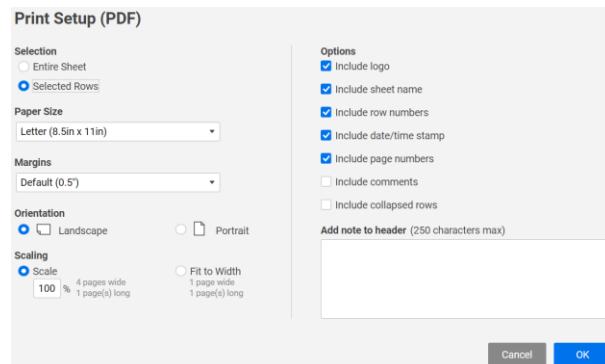


Figure 3: Print Setup Dialog

Export Icon – Allows the entire sheet to be downloaded to Excel. Access this function by clicking the three dots next to 'Reports Catalog (View Only)'

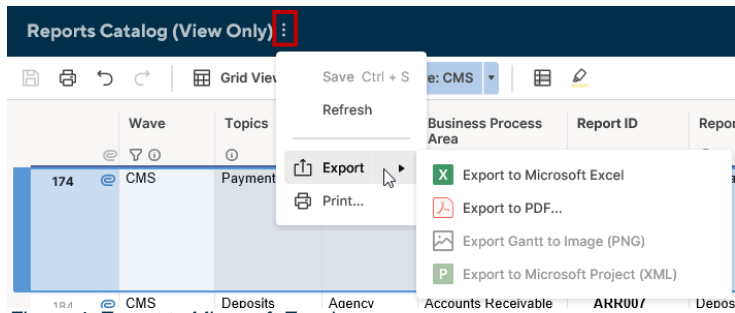


Figure 4: Export to Microsoft Excel

View Icon – Smartsheet sheets can be viewed in the following ways:

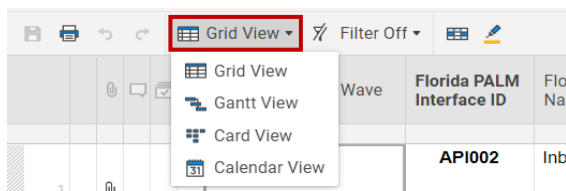


Figure 5: View Menu with Options

Grid View – The default view; data is presented in in columns and rows, similar to Excel.

Wave	Topics	Report Audience	Business Process Area	Report ID	Report Name	Report Description	Key Data Elements	Navigation
1	Departmental Projects, Grants, & Contracts	Agency, Enterprise	Asset Management	AMR001	Asset CFDA/CSFA Report	Report that lists the CFDA/CSFA Number(s) of assets that are funded from Federal or State grants. Used to track Grant related asset information when Federal Funds or State Financial Assistance is associated with the asset.	CFDA Number, CSFA Number, Asset ID, Asset Description, Tag Number, Fund	The navigation will be identified upon completion of design activities.
2	Departmental Assets & Property	Agency	Asset Management	AMR002	Asset Funding Source Report by Percentage	Report that lists assets purchased with Federal Funds and identifies the percentage of purchase price provided Federally. Used to track Grant related asset information when Federal Funds and/or State Financial Assistance is associated with the asset and determine financing ratio.	CFDA Number, CSFA Number, Asset ID, Tag Number, Asset Description, Fund, Percentage, Grant Amount	The navigation will be identified upon completion of design activities.
3	Departmental Assets & Property	Agency	Asset Management	AMR003	Asset Remaining Useful Life Report	Report that lists assets due for disposition, based on the remaining estimated useful life.	Asset ID, Tag Number, Asset Description, Disposition Date, Remaining Estimated Useful Life	The navigation will be identified upon completion of design activities.
4	Departmental Assets & Property	Agency	Asset Management	AMR004	Asset Sale Proceeds Report	Report of assets sold that are greater than a user-specified dollar amount. Used to identify assets sold for proceeds within a specified range.	Asset ID, Asset Description, Tag Number, Disposition Date, Proceeds	The navigation will be identified upon completion of design activities.
5	Departmental Assets & Property	Agency	Asset Management	AMR006	Asset Improvement Report	Report that lists improvements associated with an asset, including optional unique identification of improvements associated with specific assets. Used to identify additional capitalized costs associated with an asset.	Asset ID, Asset Description, Tag Number, Capitalized Costs, Improvement Dates	The navigation will be identified upon completion of design activities.
6	Departmental Assets & Property	Agency	Asset Management	AMR007	Asset Report by User and Location	Report that lists all assets assigned to an individual by location.	Asset ID, Asset Description, Tag Number, Asset Location, Assignee Name, Employee ID	The navigation will be identified upon completion of design activities.
7	Departmental Assets & Property	Agency	Asset Management	AMR008	Asset Sub Ledger Report	Online display or printable subsidiary ledgers of fixed asset balances. Used to identify total cost and accumulated depreciation of an asset.	Asset ID, Asset Description, Tag Number, Asset Location, Assignee Name, Employee ID	The navigation will be identified upon completion of design activities.
8	Departmental Assets & Property	Agency	Asset Management	AMR009	Asset Surplus Report	Online display or printable report of certified surplus assets, including Financial history of each asset. Used to identify assets certified by Agency Surplus Board and related Financial history of each asset.	Asset ID, Asset Description, Tag Number, Asset Cost(s), Accumulated Depreciation, Date	The navigation will be identified upon completion of design activities.
9	Departmental Assets & Property	Agency	Asset Management	AMR010	Asset Acquisition Report	Report that lists transaction register of all asset acquisitions during a user-defined time period by asset class type, agency, transaction date, or purchase amount. Used to list all	Asset ID, Asset Description, Tag Number, Asset Status, Transactions, Transaction Dates	The navigation will be identified upon completion of design activities.

Figure 6: Example Grid View

Card View – Displays summary information for each line within the sheet as a series of ‘cards’ within columns. Clicking the card displays a dialog box with all the fields related to that item.

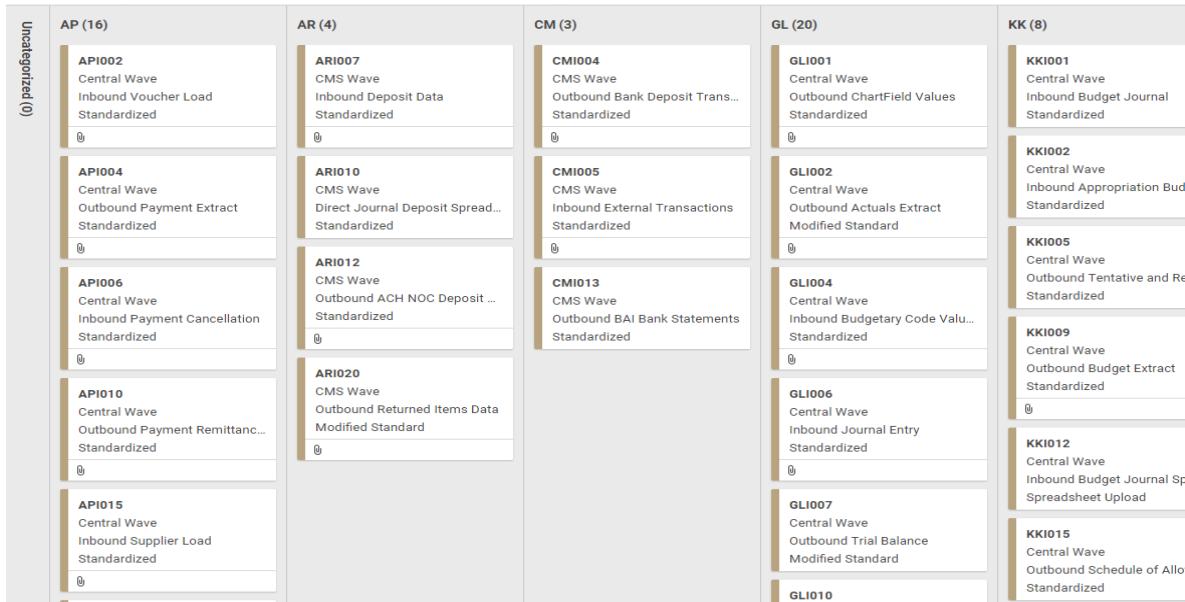


Figure 7: Example Card View

The Card View can also be combined with filters and different viewing options to assist in finding reports.

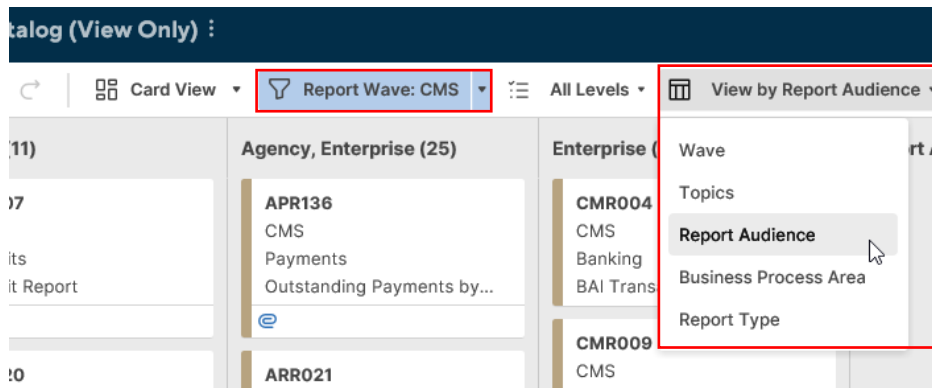


Figure 8: Applying Filters and Viewing Options in Card View

Filter Icon - Like Excel, sheets can have filters applied to them. Florida PALM has created the following filters that are universally shared:

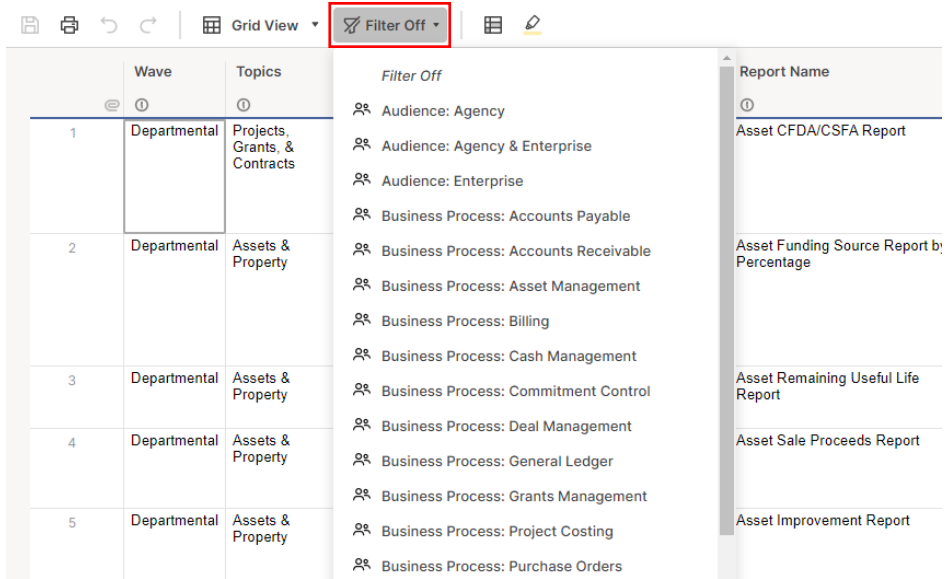


Figure 9: Filter Menu Options

Column Heading

When you hover over a column heading with the mouse three vertical dots appear. Click the 'dots' and the Column Menu appears with the following options.

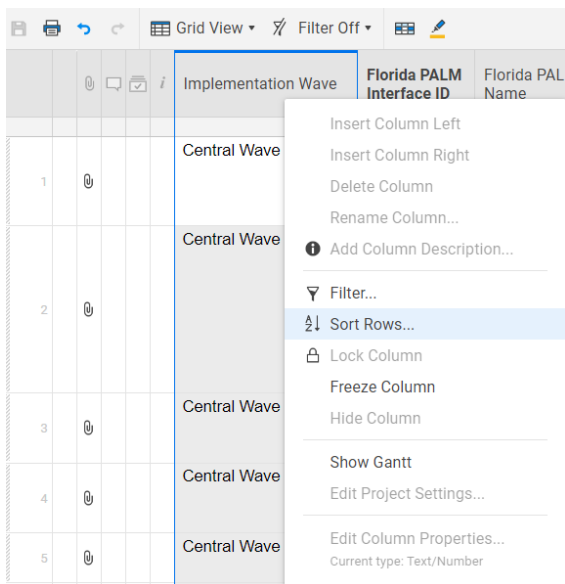


Figure 10: Sheet Column Heading Drop-Down Menu

- Filter – allows creation of a custom filter for data within the column.
- Sort Rows – allows sorting of the data using multiple columns.
- Freeze Column – prevents scrolling of the selected column, and all columns to its left.
- Show Gantt – not applicable

Attachments

Smartsheet allows document attachment per row. On the right side of a sheet, there may be a paperclip icon (Figure 11) denoting that one or more attachments are associated a row(s) of data.

Wave	Topics	Report Audience	Business Process Area	Report ID	Report Name	Report Description	Key Data Elements	Navigation
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Figure 11: Sheet Row Attachment

Clicking the paperclip opens the ‘Attachments’ window on the right side of the screen, displaying the attachment(s) for the row.

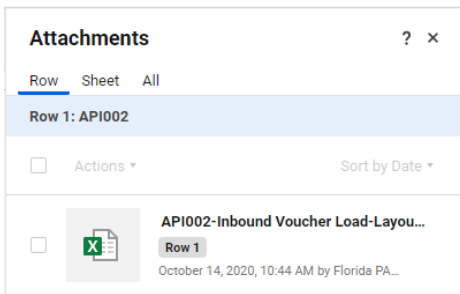


Figure 12: Sheet Attachments Window

Clicking the attachment icon (Figure 13) downloads the file to your computer via the browser.

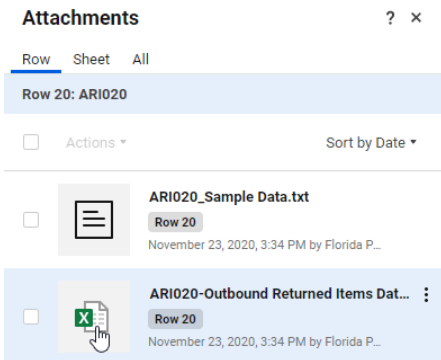


Figure 13: Sheet Attachment Download

Switching the selection from ‘Row’ to ‘All’ allows selection of multiple attachments for simultaneous download via a .zip file. File(s) can also be selected and sent via email using the ‘Actions’ menu.