

Navigating the Reports Catalog in Smartsheet

This Job Aid will assist your navigation within the Reports Catalog on Smartsheet. Within this document you can learn about:

- Dashboard – Includes several worksheets associated with the Reports Catalog
- Icon Bar – Describes the different icons that appear at the top of the Reports Catalog
- Column Heading – Describes what may be done at a column level (e.g., sort)
- Attachments – Describes how to locate and retrieve attachments for a given Report

Dashboard

Accessing the Reports Catalog Dashboard takes you to a menu of options and different worksheets for helpful information:

- Reports Catalog: Provides a detailed listing of the Reports
- Overview: Provides guidance for using the Reports Catalog
- Topics: Categorizes the reports by subject
- Acronyms: Defines the abbreviations used within the Reports Catalog
- Public Queries: Lists production queries currently available to agencies
- Change Log: Identifies the updates to the Reports Catalog

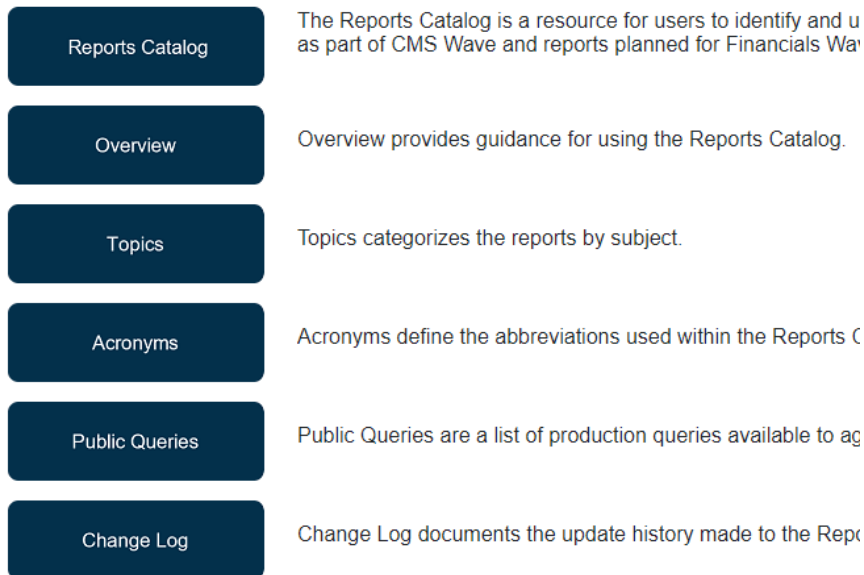


Figure 1: Reports Catalog Dashboard

Icon Bar

Within the Reports Catalog worksheet, the Icon Bar consists of the following accessible icons:

- Print Icon - Allows the sheet to be printed with a comprehensive list of formatting and output options.

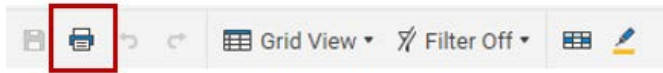


Figure 2: Print Icon

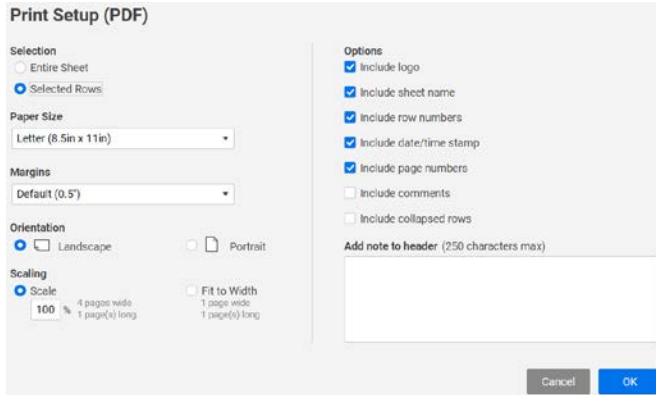


Figure 3: Print Setup Dialog

- 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)'.

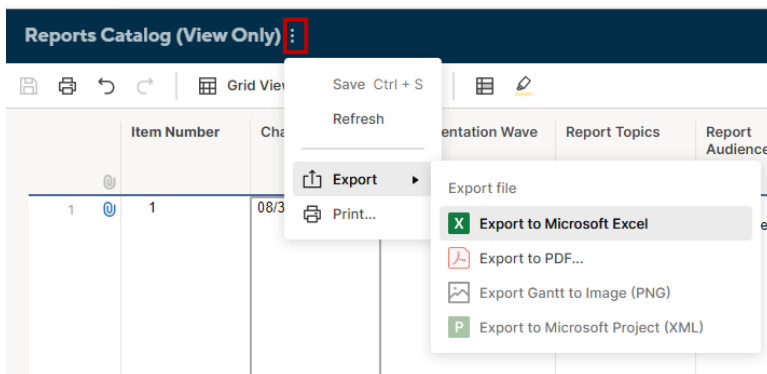


Figure 4: Export to Microsoft Excel

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

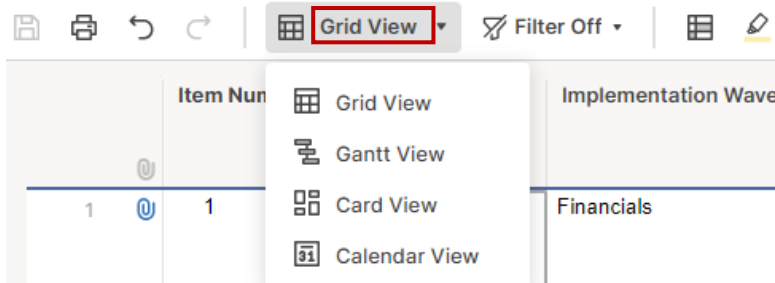


Figure 5: View Menu with Options

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

Item Number	Change Date	Implementation Wave	Report Topics	Report Audience	Module	Report ID	Report Name	Report Description	Report Use	Suggest Frequency	
1	06/31/23		Financials	Assets & Property	Agency Enterprise	AM	AMR042	Asset Staging Report	A list of asset transactions in AM that have been staged for processing.	Report used to monitor records requiring action.	Daily
2	06/31/23		Financials	Encumbrances & Vouchers	Agency Enterprise	AP	APR003	Outstanding Vouchers Report	Aging schedule of vouchers that have either not been approved or paid.	Report is used to monitor vouchers through the lifecycle of voucher entry to voucher posting to identify if action need to be taken.	Daily
3	06/31/23		Financials	Payments	Agency Enterprise	AP	APR007	Scheduled Payments Report	A report that lists payments scheduled to be made as part of the payment cycle.	Report is used to monitor payments that have completed post-voucher cycle process, and are ready to be picked up for pay cycle. The report can also be used to evaluate the completion of the cash checking process.	Daily
4	06/31/23		Financials	Encumbrances & Vouchers	Agency Enterprise	AP	APR013	Voucher Activity Report	A listing of voucher activity that identifies all actions taken on Vouchers for a specific date range.	Report is used to monitor daily activity of vouchers entered by the data entry user.	Daily
5	06/31/23		Financials	Payments	Agency Enterprise	AP	APR024	Prompt Payment Report	Report that lists approaching Prompt Payment processing deadlines.	Report is used to monitor vouchers that are approaching prompt payment processing deadline. The report also lists interest vouchers for payments that did not meet prompt payment requirement.	Daily

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.

Uncategorized (0)	CMS (47)	CMS/Financials (6)	Financials (8)
	35 Administrative CM Approve Transfer Template...	7 Deposits AR Deposit Report	1 Assets & Property AM Asset Staging Report
	68 Administrative NA End User Roles	8 Deposits AR Reconciled Deposits Report	13 Budget KK Budget Detail Activity Report
	69 Administrative SD Separation Of Duties (SOD)...	9 Deposits AR Unreconciled Deposits Rep...	14 Budget KK Appropriations Budget Led...
	28 Banking CM Bank Account Listing Report	10 Deposits AR Debit Memo	2 Encumbrances & Vouchers AP Outstanding Vouchers Report
	29 Banking CM BAI Transaction Counts	11 Deposits AR DOR Agency Deposit Report	4 Encumbrances & Vouchers AP Voucher Activity Report
	30		

Figure 7: Example Card View

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

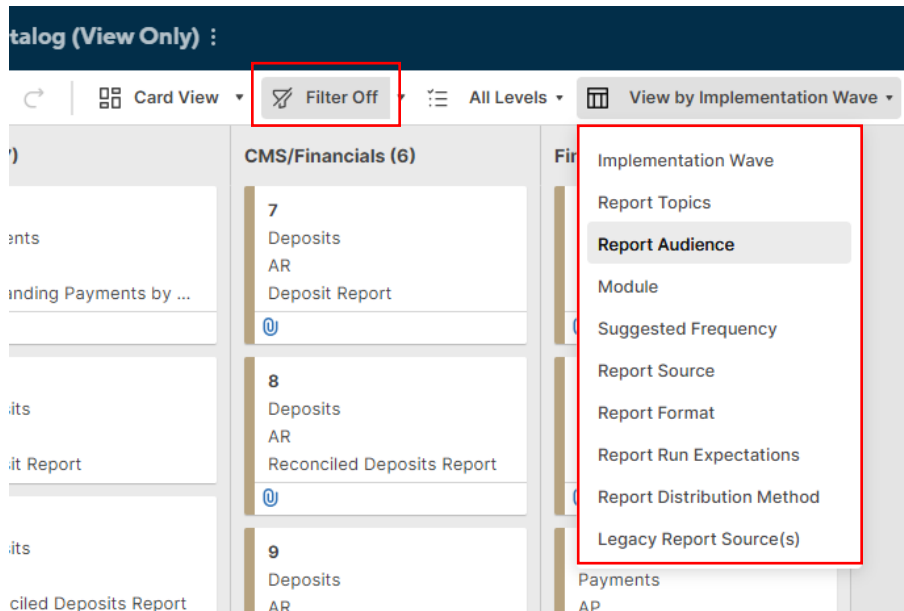


Figure 8: Applying Filters and Viewing Options in Card View

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

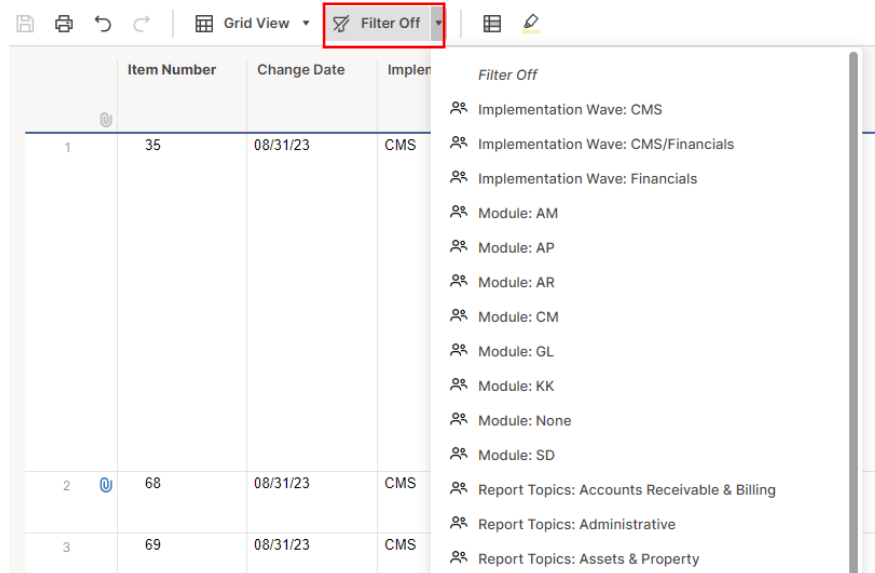


Figure 9: Filter Menu Options

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.

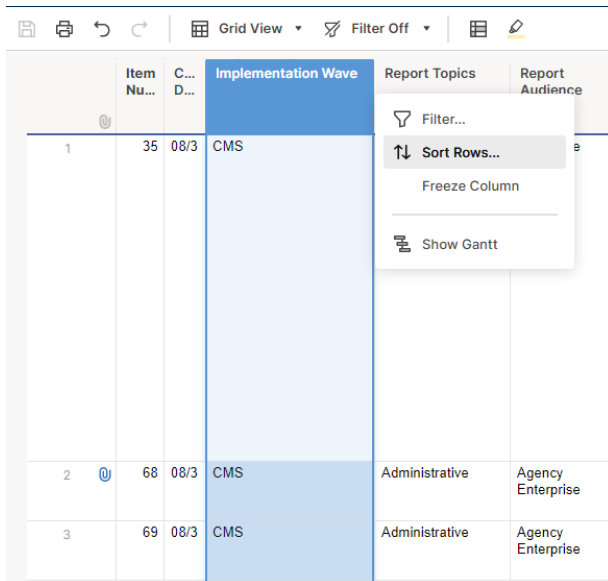


Figure 10: Sheet Column Heading Drop-Down Menu

- 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 denoting that one or more attachments are associated a row(s) of data.

Item Number	Change Date	Implementation Wave	Report Topics	Report Audience	Module	Report ID	Report Name	Report Description	Report Use	Sugg Freq
2	08/31/23	Financials	Encumbrances & Vouchers	Agency Enterprise	AP	APR003	Outstanding Vouchers Report	Aging schedule of vouchers that have either not been approved or paid	Report is used to monitor vouchers through the lifecycle of voucher entry to voucher posting to identify if action need to be taken.	Da
3	08/31/23	Financials	Payments	Agency Enterprise	AP	APR007	Scheduled Payments Report	A report that lists payments scheduled to be made as part of the payment cycle.	Report is used to monitor payments that have completed post voucher cycle process, and are ready to be picked up for pay cycle. The report can also be used to evaluate the completion of the cash checking process.	Da

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.

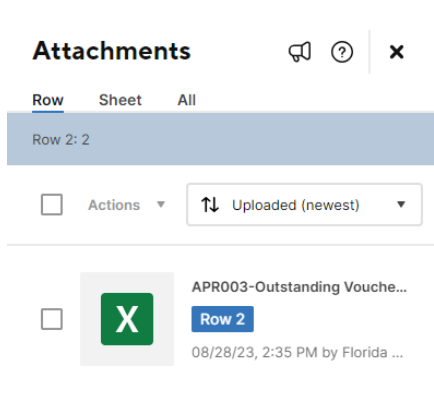


Figure 12: Sheet Attachments Window

Clicking on the attachment file to download to your computer via the browser.

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.