

Smartsheet User Guide

Revision History

Version	Date	Revision Notes
1.0	12/14/2020	Published version
2.0	06/07/2021	Revised to include Catalog of Conversions Offerings
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Getting Started with Smartsheet

Welcome to working with Smartsheet. Many documents are provided in Smartsheet, including public and confidential documents. This document gives you an overview of how to use Smartsheet.

Registration in 5 Easy Steps

- 1) You'll receive an email from Florida PALM with a link to view the Florida PALM Dashboard or Smartsheet. Click the link in the email to proceed:

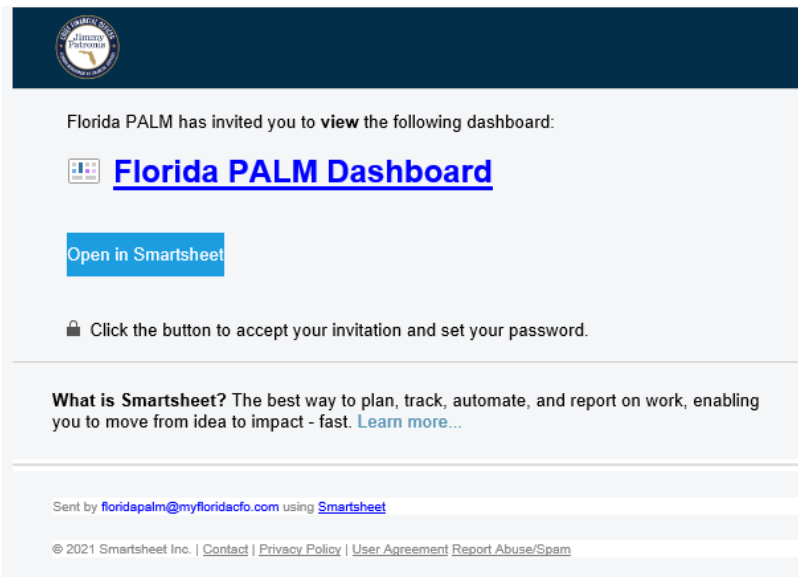
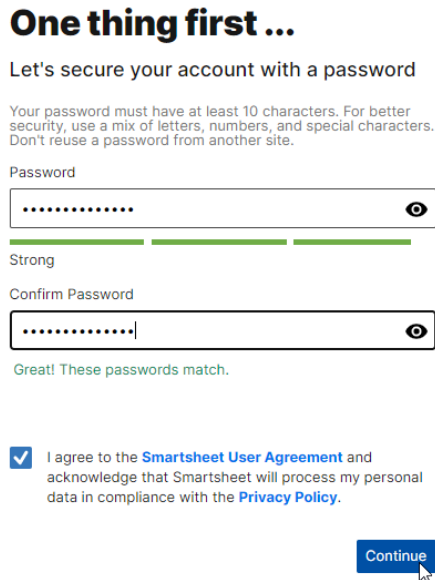


Figure 1: Florida PALM invitation email from Smartsheet

- 2) You'll be taken to the Smartsheet website where you'll create an account – since Smartsheet already knows your email address (Florida PALM Project provided it to them), you simply need to create a password for your account. Enter a password, agree to the Smartsheet User Agreement, and click Continue:



3) Complete your profile, including your Name, Title, etc. and upload a picture of yourself if you'd like – click the Continue button when you're done.

Figure 3: Completing your user profile in Smartsheet

- 02/06/2024

Welcome to Smartsheet (save this email!) Inbox x

Smartsheet <welcome@info.smartsheet.com>
to me ▾

10:56 AM (7 minutes ago) ☆

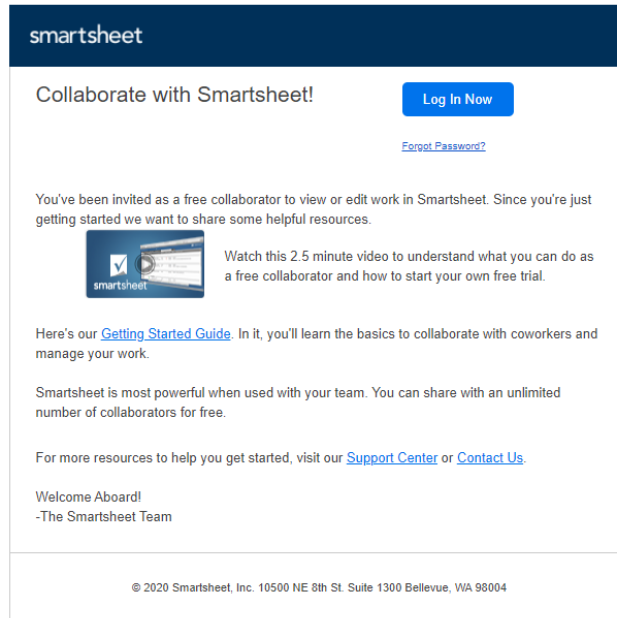


Figure 4: Confirmation email from Smartsheet confirming registration

- 5) Your registration is complete, and you now have access to the Florida PALM Dashboard and Smartsheet Documents.

Finding Your Way Around Smartsheet Sheets

The 'Interface Catalog' and 'Conversions Catalog' are examples of *Sheets* in Smartsheet. All Sheets share a common set of screen objects, in addition to their similarities with Microsoft Excel Worksheets.

Menu Bar

Every sheet within Smartsheet has three menu options:

- File – contains the following sub-menu items:
 - **Create New...** - [See FAQ, Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my license?](#)
 - **Import** - [See FAQ, Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my license?](#)
 - **Open...** - Opens a Smartsheet resource that you have permission to access
 - **Save as New...** - [See FAQ, Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my license?](#)

- **Save as Template...** - [See FAQ, Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my license?](#)
- **Rename** - [See FAQ, Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my license?](#)
- **Refresh** – Refreshes the data within the sheet
- **Share...** - [See FAQ, When I'm viewing pages in Smartsheet I see a blue button that says 'Share' – what purpose does this serve?](#)
- **Send as Attachment...** - Allows you to send the sheet as an email attachment to yourself or others, either immediately, or as a scheduled, repeating action. [See FAQ, When I'm viewing a sheet in Smartsheet, how can I export it for offline use?](#)
- **Email Shared Users...** - Allows you to send an email to all the individuals that the sheet is shared with
- **Export** - Export the sheet to your local machine in one of several formats, for offline use. [See FAQ, When I'm viewing a sheet in Smartsheet, how can I export it for offline use?](#)
- **Print...** - Send the contents of the sheet to a printer
- **View Activity Log** - Not available to users with free license
- **Properties...** - Displays a dialog box containing detailed information about the sheet, like its Name, Owner, Created Date, and the URL it can be directly access
- Automation – options on this menu require an Administrative (paid) license
- Forms – options on this menu are disabled

Icon Bar

Below the Menu Bar, the Icon Bar consists of the following icons (greyed out icons are ignored):

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

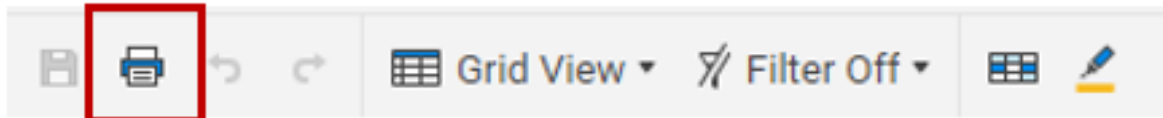


Figure 5: Toolbar Print Icon

Print Setup (PDF)

Selection

☒ Entire Sheet

☐ Selected Rows

Paper Size

Letter (8.5in x 11in)

Margins

Default (0.5")

Orientation

☒ Landscape ☐ Portrait

Scaling

☒ Scale ☐ Fit to Width

100% 4 pages wide 1 page wide
5 page(s) long 2 page(s) long

Options

☒ Include logo

☒ Include sheet name

☒ Include row numbers

☒ Include date/time stamp

☒ Include page numbers

☐ Include comments

☐ Include collapsed rows

Add note to header (250 characters max)

Cancel

OK

Figure 6: Print Setup Dialog

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

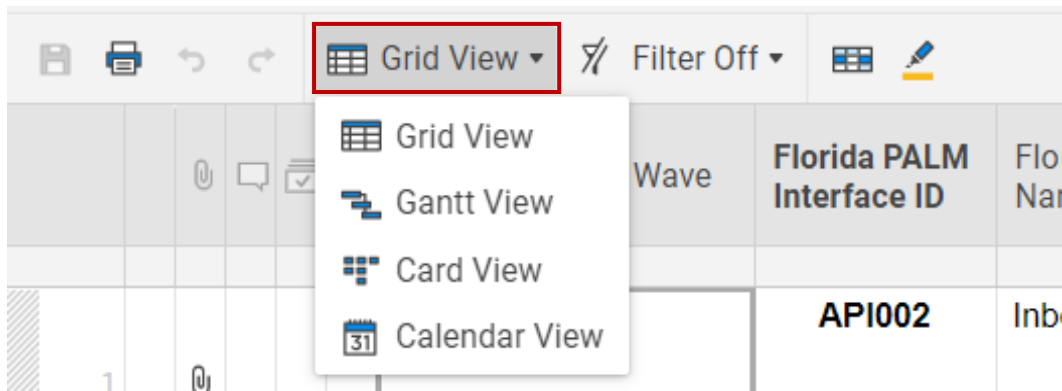


Figure 7: Toolbar View Menu with Options

- Gantt View – Presents the data in a Gantt Chart. The Florida PALM project is not currently utilizing Smartsheet for Gantt Charts, so clicking the View selection will return an error stating, “A sheet must contain at least two date columns to display the Gantt view.”

- Grid View – The default view; data is presented in a format like Excel.

Interface Catalog (View Only) :						
		RICEFW_ID	CMS Wave Applicability	Financials Wave Applicability	Payroll Wave Applicability	Florida PALM Interface ID
1		AMI002	Not Available	All Agencies	Not Available	AMI002
2		AMI003	Not Available	All Agencies	Not Available	AMI003
3		AMI004	Not Available	All Agencies	Not Available	AMI004
		AMI005	Not Available	All Agencies	Not Available	AMI005

Figure 8: 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.

Interface Catalog (Change Log) (View Only) :			
All Levels View by Change Type			
Uncategorized (4)	Add - Interface (111)		Add - Interface Layout (123)
	CTI001 12/11/23		PRI016 01/25/24
	CTI002 12/11/23		AMI002 12/11/23
	GLI084 12/11/23		AMI003 12/11/23
			Add - Sample Data File (141)
			AMI002 12/11/23
			AMI003 12/11/23
			AMI006 12/11/23

Figure 9: Example Card View

- Calendar View – Presents the data in a calendar (where appropriate).

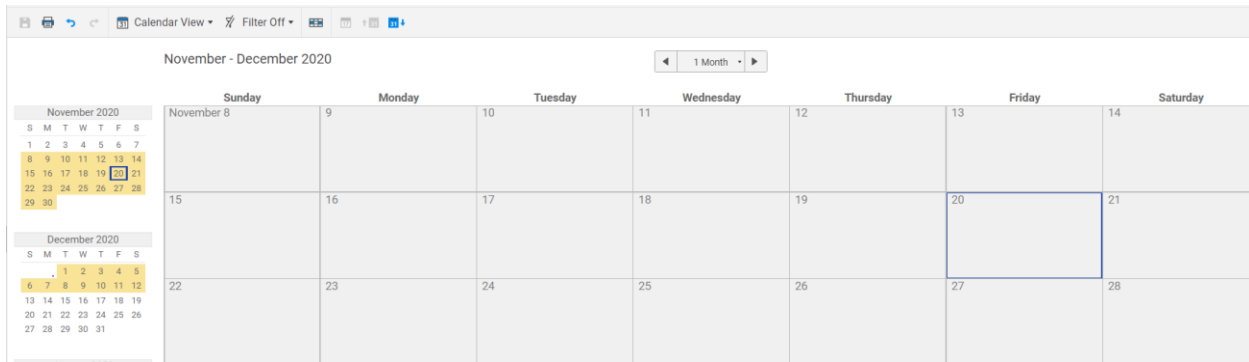


Figure 10: Example Calendar View

- Filter Icon - Like Excel, sheets can have filters applied to them. Smartsheet allows users to create, but not save filters - Florida PALM has created several filters that are universally shared (*displayed is a partial list of available filters*):

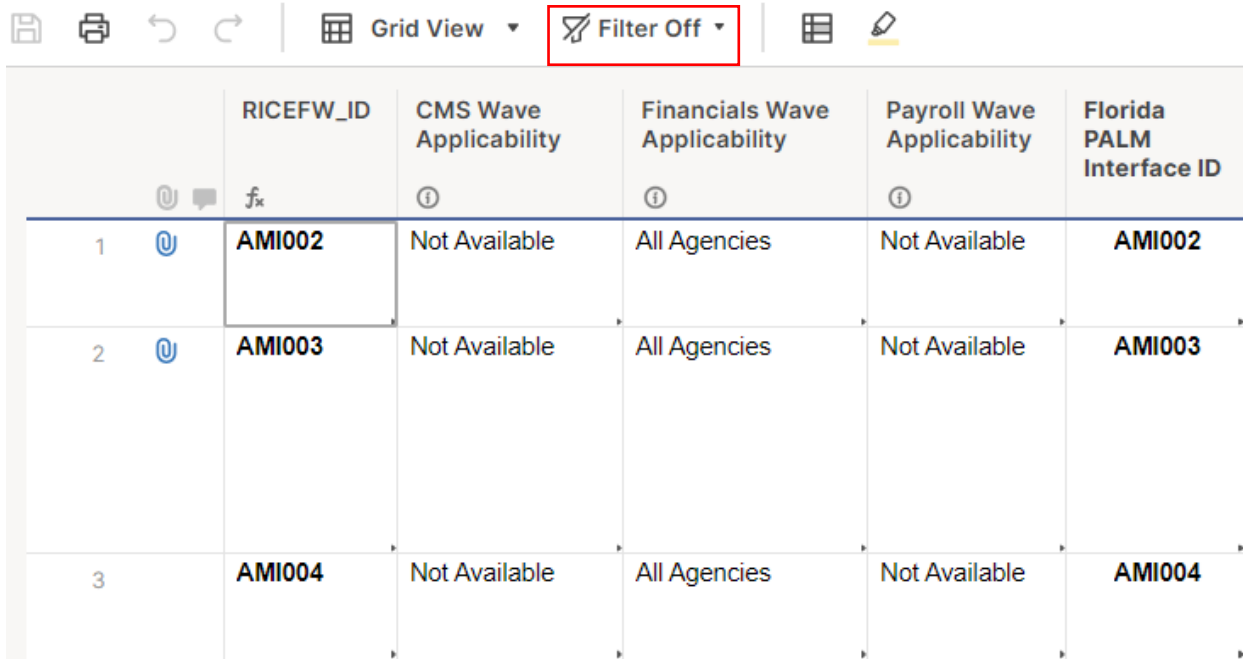


Figure 11: Toolbar Filter Menu Options

- Conditional Formatting Icon - Conditional formatting is only available if Florida PALM applies it to a sheet. Users cannot create their own conditional formatting rules.

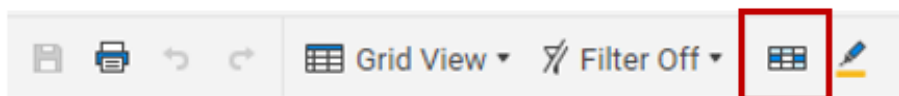


Figure 12: Toolbar Conditional Formatting Icon

- **Highlight Changes Icon** - Allows users to color-code individual cell and attachment changes that have occurred within a period that they specify.

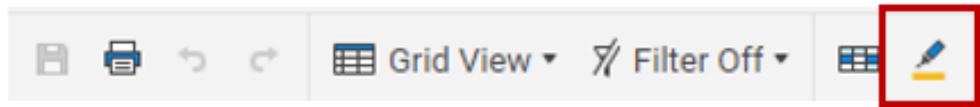


Figure 13: Toolbar Highlight Changes

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.

Interface Catalog (View Only) :

	RICEFW_ID	CMS Wave Applicability	Financials Wave Applicability	Payroll Wave Applicability	Florida PALM Interface ID	Florida PALM Interface Name	Florida PALM Interface Description
1	AMI002	Not Available	All Agencies	Not Available	AMI002	Inbound Asset Transfer and Disposal Request	Inbound interface to request asset transfer and disposal approval.
2	AMI003	Not Available	All Agencies	Not Available	AMI003	Outbound Asset Extract	Outbound asset extract file containing both physical and cost information.
3	AMI004	Not Available	All Agencies	Not Available	AMI004	Outbound Asset Physical Inventory Extract	Outbound interface extract of asset physical information and Tag Number to agency business systems.

Figure 14: 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 as a hierarchy
- **Freeze Column** – prevents scrolling of the selected column, and all columns to its left
- **Show Gantt** – not applicable

Column Description Tooltip

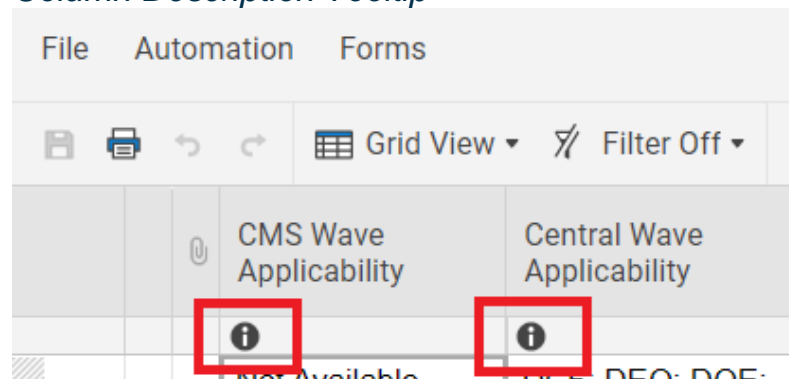
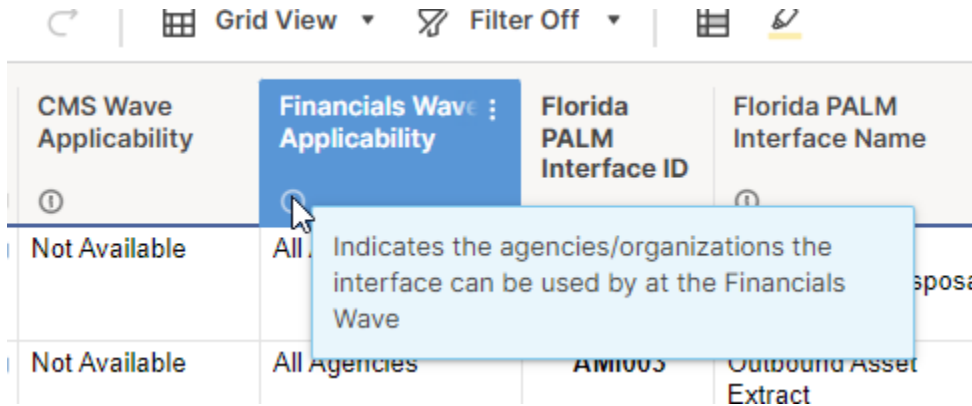


Figure 15: Column Description Tooltip Indicator

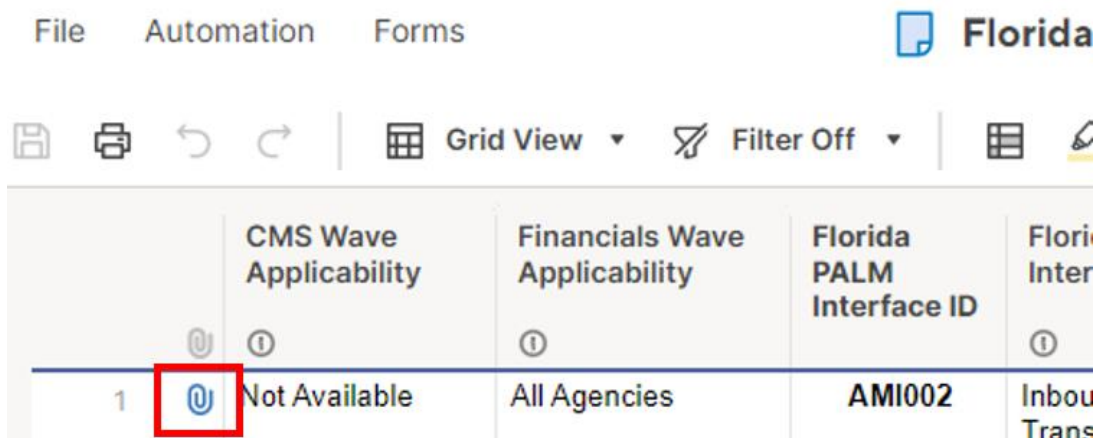


CMS Wave Applicability	Financials Wave Applicability	Florida PALM Interface ID	Florida PALM Interface Name
Not Available	All Agencies	AMI003	Outbound Asset Extract

Figure 16: Column Description Tooltip Pop-Up

When you hover over the column tooltip with the mouse, a brief description of the data within the specific column will appear. The column tooltip is located directly below the column name.

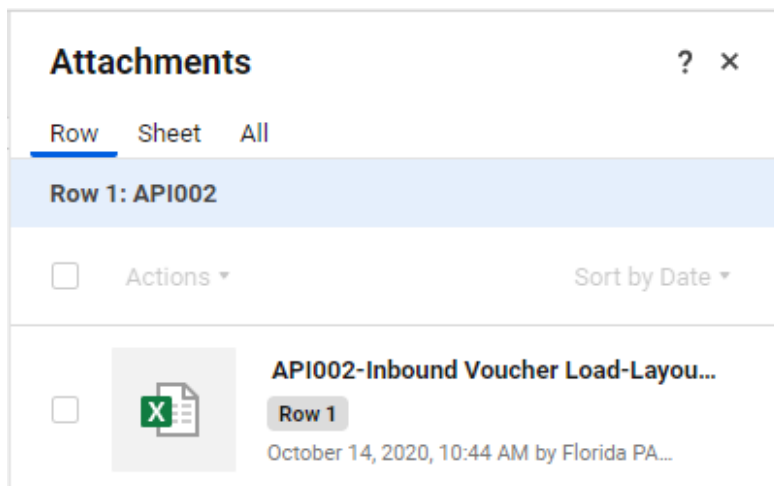
Attachments



	CMS Wave Applicability	Financials Wave Applicability	Florida PALM Interface ID	Florida PALM Interface Name
1	Not Available	All Agencies	AMI002	Inbound Transaction

Figure 16: Sheet Row Attachment

On the left side of a sheet, there may be a paperclip icon denoting that one or more attachments are associated with the rows data. Clicking the paperclip icon opens the 'Attachments' window on the right side of the screen, displaying the attachment(s) for the row.



Attachments

Row Sheet All

Row 1: API002

Actions Sort by Date

API002-Inbound Voucher Load-Layou...
Row 1
October 14, 2020, 10:44 AM by Florida PA...

Figure 178: Sheet Attachments Window

Clicking the attachment icon downloads the file to your computer via the browser.

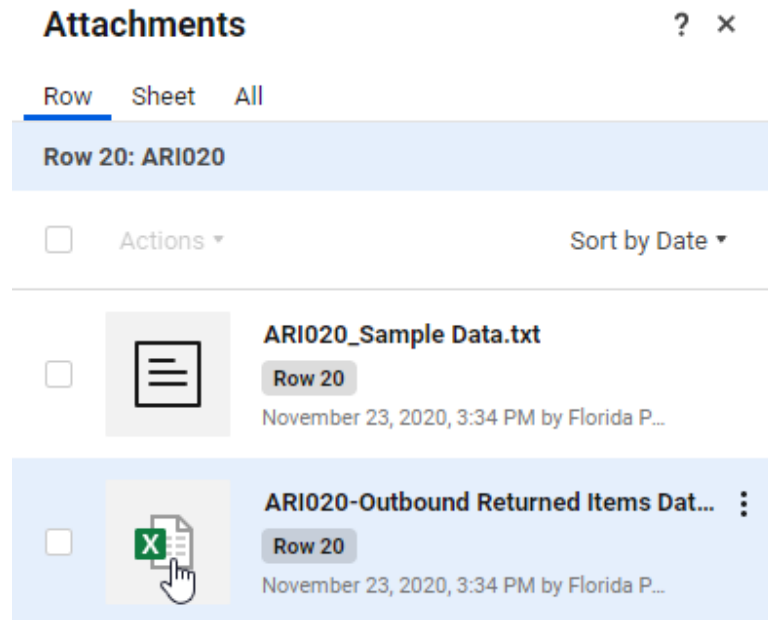


Figure 18: Sheet Attachment Download

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.

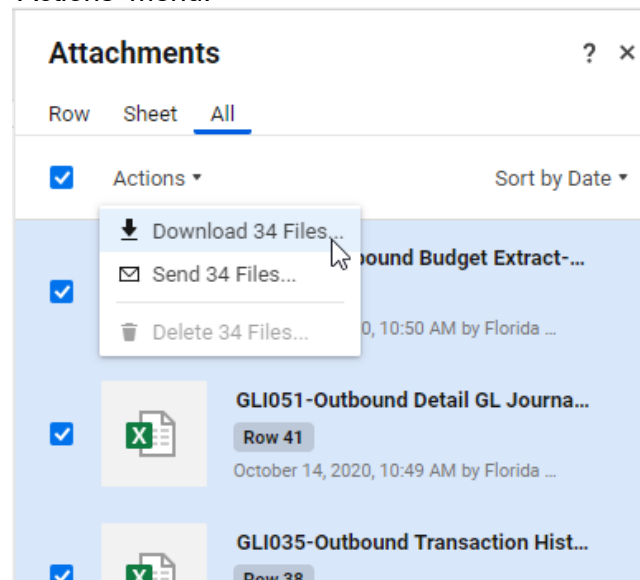
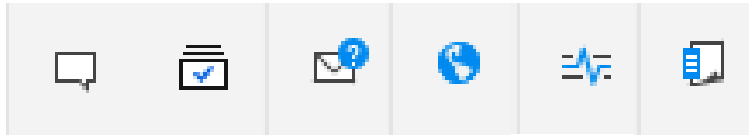


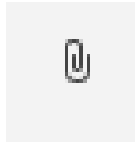
Figure 19: Sheet Attachments Actions Menu

Right-side vertical Icon Bar

The Icon Bar on the right side of the screen has a variety of options, but only a few are available:



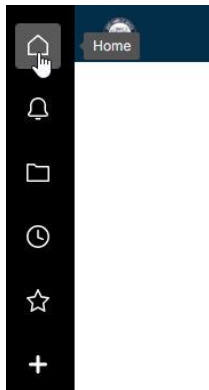
- Not Used



- Shows or hides the attachment window

Figure 20: Vertical Menu Icons

The Left Panel



The 'Home' button displays a list of suggested Smartsheet resources that you might want to interact with based on your previous browsing history:

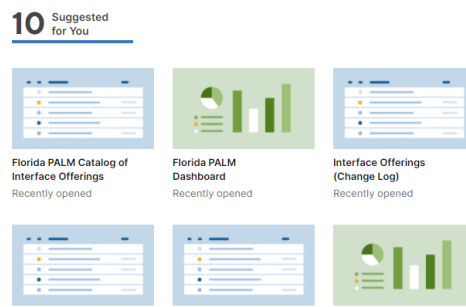
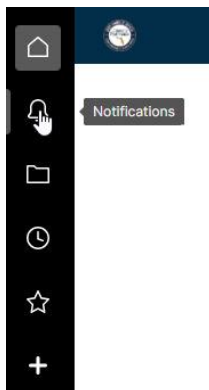


Figure 21: Home button



The 'Notifications' button displays a chronological list of notifications generated by Smartsheet.

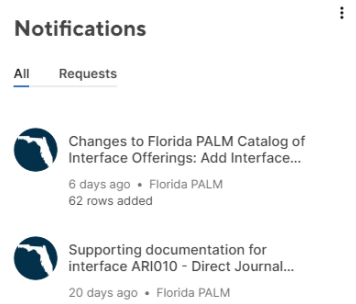
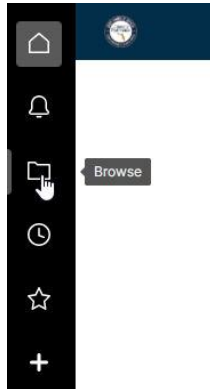


Figure 22: Notifications button

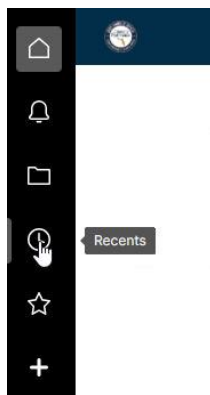


The 'Browse' button allows you to view the various Smartsheet objects that you've been granted access to in a folder-type structure.

Browse

- WorkApps
- Sheets
- Workspaces
- Resource Views
- Deleted Items

Figure 23: Browse button

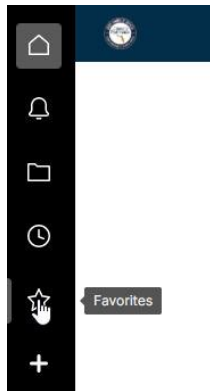


The 'Recents' button link displays a list of all the Smartsheet objects that you've accessed recently. Some of these options may seem redundant, but as more and more resources are added to Smartsheet these *shortcut* menus come in handy for organizing your activities.

Recently Opened

- Florida PALM Catalog of Interface Offerings
- Florida PALM Dashboard
- Security Group Change Log
- Interface Connection Inventory
- Catalog of Conversion Offerings
- Interface Offerings (Change Log)
- Conversions Offerings (Change Log)
- Interface Statistics

Figure 24: Recents button



The 'Favorites' button displays items that have been tagged by you as specific Smartsheet objects that you want to remember and navigate to quickly. You can add objects to your favorites list by clicking grayed-out stars that then become yellow when they're in your favorites list:

Favorites

- Catalog of Conversion Offerings
- Florida PALM Catalog of Interface Offerings
- Florida PALM Dashboard

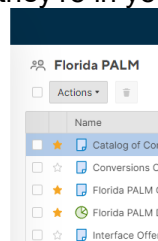


Figure 25: Favorites button

User Account Menu

In the upper-left corner of the screen there is a round icon that displays a customized menu for the user when clicked.

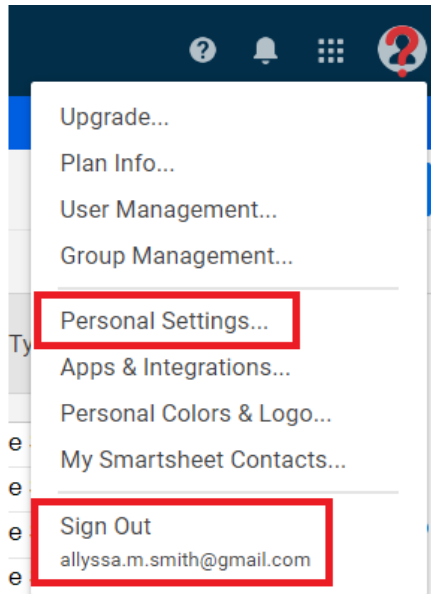


Figure 26: User Account Menu

The only two options of relevance are 'Sign Out' and 'Personal Settings...' which displays the following dialog box:

Personal Settings

Let others in your account see who you are and how to reach you.

[Change Photo](#)

Have A Hankerin

Florida PALM Test User

Testing

Florida PALM

Work Phone Mobile Phone

haveahankerin@gmail.com

[Manage Email Addresses](#)

Job Category ⓘ

Figure 27: Personal Settings Dialog

- **Profile:** Add or update contact information, change password, add a photo, etc.
- **Settings:** Allows you to customize the way you interact with Smartsheet. Please update the Time Zone setting to match your location and uncheck all the items in the 'Communication Preferences' section if you do not want to receive promotional materials from Smartsheet.
- **Notifications:** Check or uncheck the options based on your preferences for receiving emails from the Florida PALM team whenever items in the Smartsheet environment are updated.
- **My Mobile Devices:** If you'd like to access the Florida PALM Smartsheet resources on your mobile device please download and install a mobile client.
- **Apps:** Not Applicable.
- **API Access:** Not Applicable.

Frequently Asked Questions

Why is Florida PALM sharing resources with Interface Partners via Smartsheet?

Answer: Smartsheet provides the ability to securely disseminate information to our entire community, without having to rely on secure communication methods.

What is the process for adding/removing people from Smartsheet access?

Answer: Please contact your Readiness Coordinator and they will assist in having users added or removed. They can also assist in providing a list of current user access.

How do I receive email notifications for when changes are made in Smartsheet?

Answer: You can turn on email notifications by performing the following steps:

1. Click on the Account icon in the upper-left corner of the Smartsheet window and select 'Personal Settings' from the menu
2. In the Personal Settings dialog, click the 'Notifications' link on the left edge of the dialog box
3. Select the 'Sheet Changes and Reminders' checkbox in the 'Email' column. If you've installed the mobile client, also select the checkbox in the 'Mobile Push' column

Note: If you want to turn off notifications, simply reverse the steps above.

Why are so many items in Smartsheet either disabled or unavailable?

Answer: Florida PALM licenses Smartsheet so we can provide free licenses to our Interface Partners (with limited functionality). Interface Partners will never be required to purchase their own license.

When I'm viewing pages in Smartsheet I see a blue button that says 'Share' – what purpose does this serve?

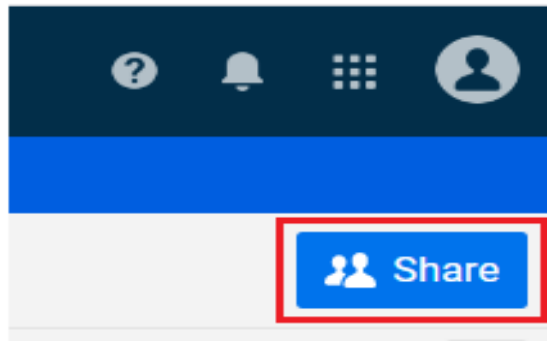


Figure 27: Share Option Button

Answer: All resources in Smartsheet will have a button at the top right that says Share. Depending on the resource, the Share feature may or may not be active or disabled. The dialog box that is displayed when clicking the Share button allows you to see who has access to the resource within your organization, and their level of permission (Viewer, Editor, etc.).

For the resources that allow sharing, you are able to add people and give them varying permissions.

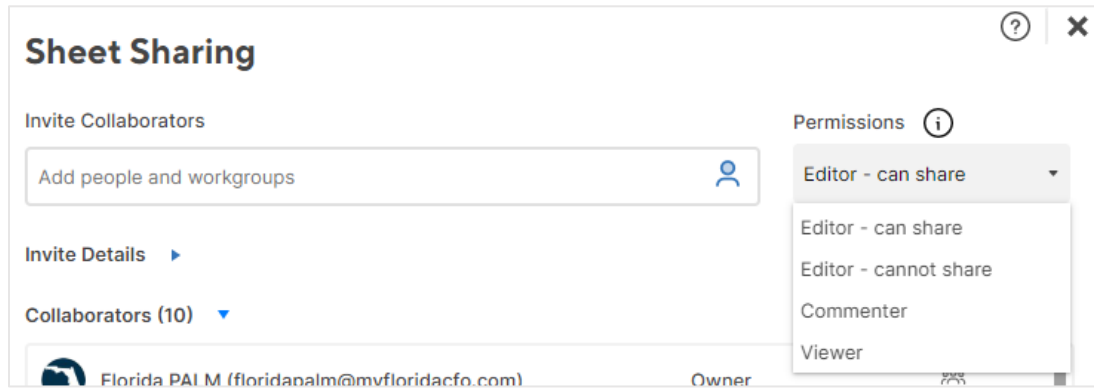


Figure 28: Sheet Sharing

The following permission levels are available:

- Editor – can share: users can edit unlocked sheet contents, add documents, comment, and share with collaborators but can't modify the column layout
- Editor – cannot share: users can edit sheet unlocked contents, add documents, and comment but cannot modify the column layout or share with collaborators
- Commentor: users can comment on contents and add documents, but cannot share the sheet, edit contents, or modify the column layout
- Viewer: can view all contents but cannot share or modify it

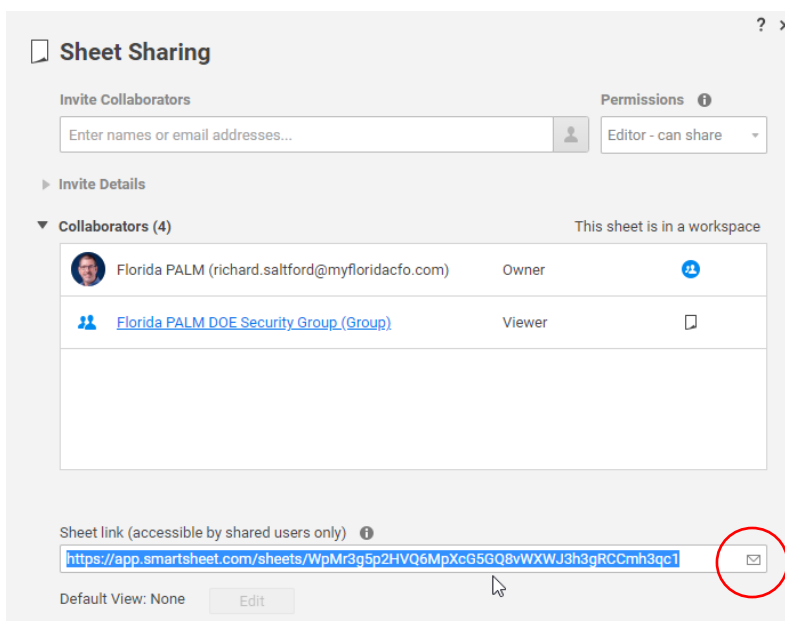


Figure 29: Sheet Sharing Dialog

You'll also notice a 'Link' field that has a URL within it. You can copy this URL and save it to your Favorites in order to directly access the Smartsheet resource. Additionally, you'll notice a tiny envelope to the right of the 'Link' field; if you click it, you'll be presented with a dialog box that will allow you to send an email message to all people who have been granted access to this Smartsheet resource (Note: you can also access this feature from the File menu, 'Email Shared Users...' menu option).

When I'm viewing a sheet in Smartsheet, how can I export it for offline use?

Answer: From the File menu, select 'Export' and then select the file format (*If the sheet does not have a File menu, click the vertical ellipses next to the sheet name and the below Export menu will appear*):

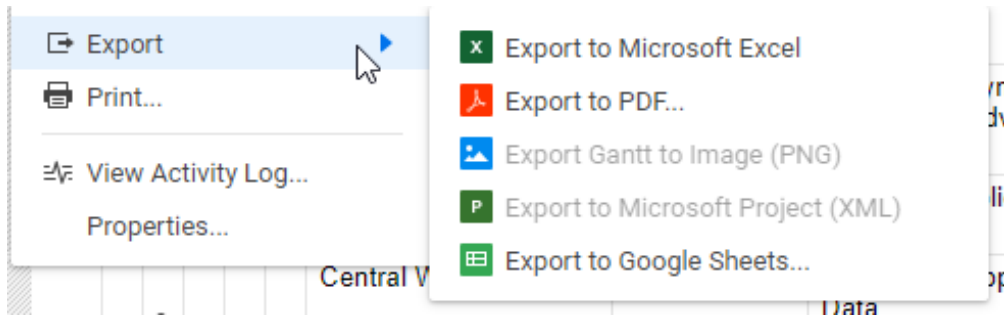


Figure30: Sheet Export Menu Options

Or select 'Send as Attachment...' from the File menu to email a copy to yourself or others. The 'Send as Attachment...' feature also allows you to schedule emailing of a Sheet on a recurring basis.

Features like 'Create New', 'Import', 'Save as New' and 'Save as Template' on the File menu appear to work – is that correct, based on my access?

Answer: While Smartsheet disables some features, other features are enabled on a time-sensitive basis. Once you execute one of the menu items that creates a resource in Smartsheet, you'll have 30 days to purchase a license – if a license is not purchased within that time period, the resources will be locked for 90 days, and then deleted. The Florida PALM project does not recommend that you create objects as it does not intend to implement any features that would require a paid license for its Interface Partners.

What resources does Florida PALM provide in Smartsheet?

Answer: Florida PALM provides several resources in Smartsheet, some that require a user account and password and some that do not.

Your Agency Florida PALM Workbook requires access to what your Agency Liaison or Project Management Liaison will give to you. The [Florida PALM Resources](#), available on the Florida PALM website, includes the Interface Catalog, Conversions Catalog, Reports Catalog and the Data Dictionary.