Smartsheet for URICs

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April 20, 2021

Today's agenda

What is Smartsheet?

How can Smartsheet help with collaboration and reduce time spent on data collection and management?

How is Smartsheet being used to improve processes in URICA and OR?

How does licensing work and what are the differences between free and licensed accounts?
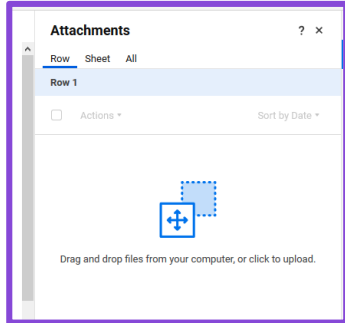
What is Smartsheet?

Web-based spreadsheet application for collaborative management of projects

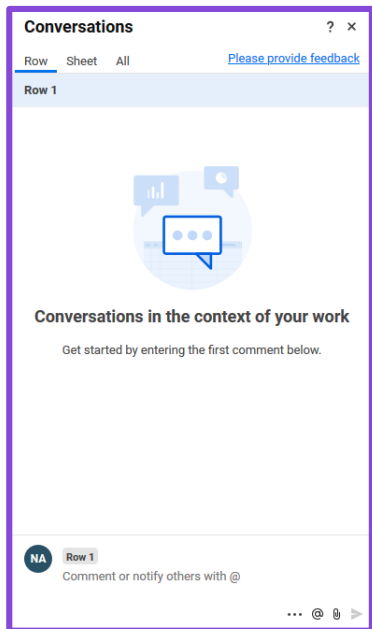Interface is similar to Microsoft Excel, but with more advanced features for collaboration
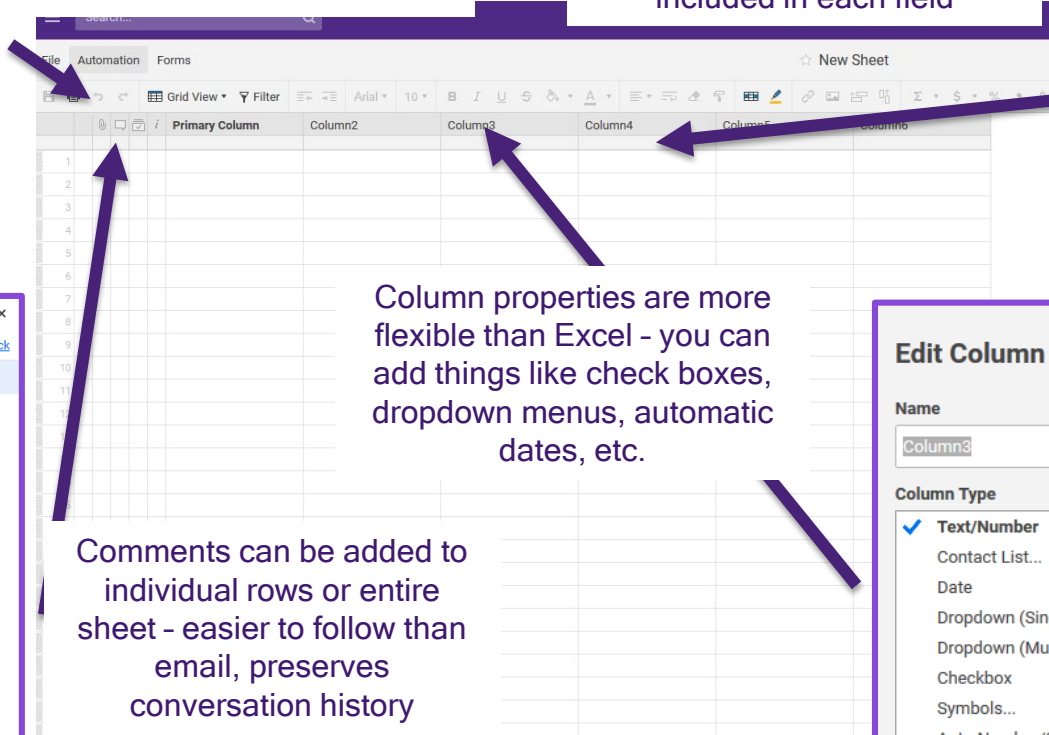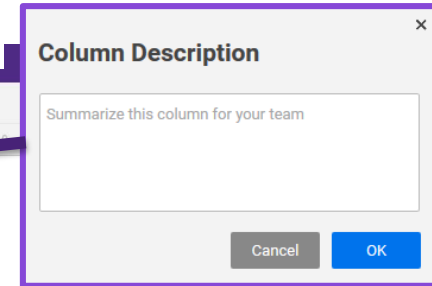
Northwestern login at http://smartsheet.northwestern.edu

Key Advantages vs. Excel

File attachments and links can be added to individual rows or entire sheet

Column description allows you to provide metadata for what is included in each field

Column properties are more flexible than Excel – you can add things like check boxes, dropdown menus, automatic dates, etc.

Comments can be added to individual rows or entire sheet – easier to follow than email, preserves conversation history
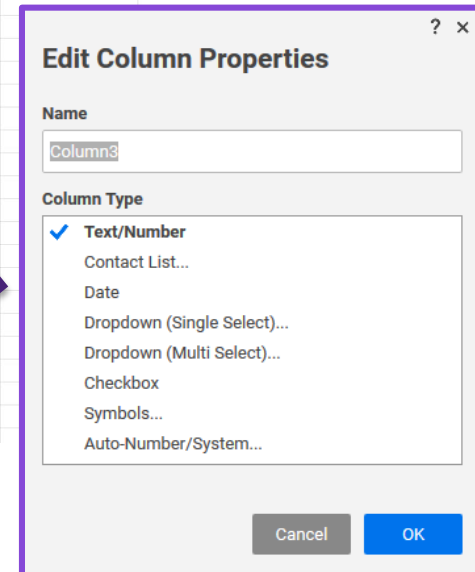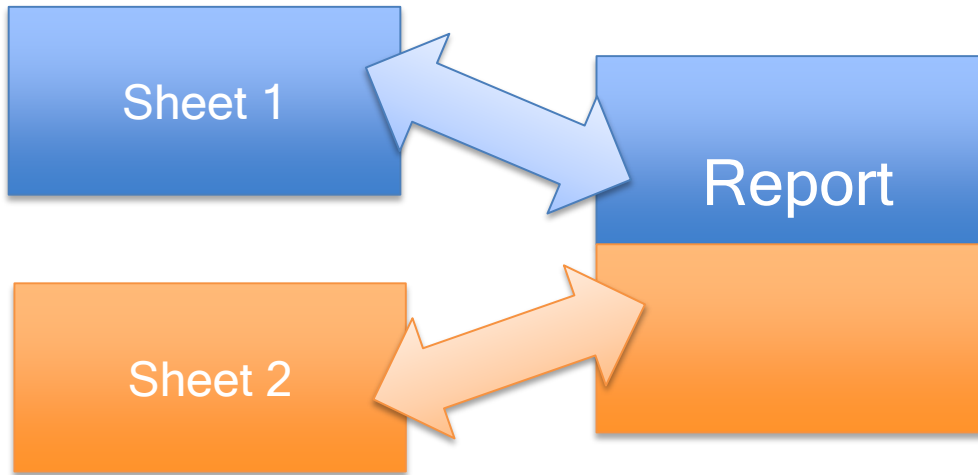
Sharing in Smartsheet

Can share to anyone with a Smartsheet account, at Northwestern or outside

Can give editor privileges, or view only

Publishing is also possible to share on websites or via a link

Reports & Dashboards

Sheet 1
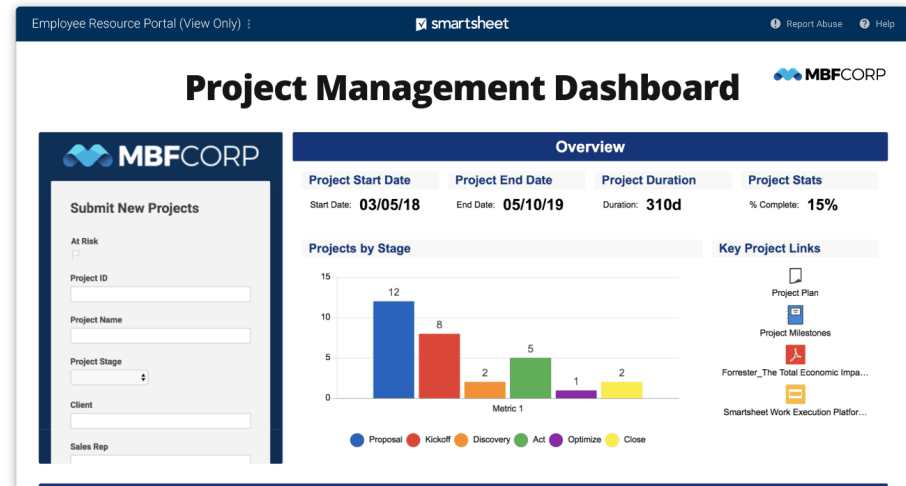
Report

Sheet 2

Reports allow you to aggregate data from multiple sheets and/or summarize data from multiple sheets – no copy and paste required, changes made to data are made everywhere

Dashboards allow you to create highly customizable visualizations, graphs, and summaries using your data

Smartsheet can also be connected to other tools like Tableau

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Dashboard Widgets

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Metric

Display key cell values from a sheet.

Chart

Chart data from a sheet or report.

Shortcut

Link to commonly accessed files, URLs, and Smartsheet Items.

Report

Display a report on the dashboard, with optional Gantt view.

Image

Add a company logo or any other image to your dashboard.

Title

Add a title to your dashboard.

Rich Text

Enter richly formatted text for instructions or updates.

Web Content

Display videos, Smartsheet forms, and other web content for your team.

Smartsheet Forms

Data and attachments from form are automatically imported into Smartsheet

Additional columns can be included on Smartsheet to help track status, add additional info, etc.

Form is public, Smartsheet private

Smartsheet Workflows
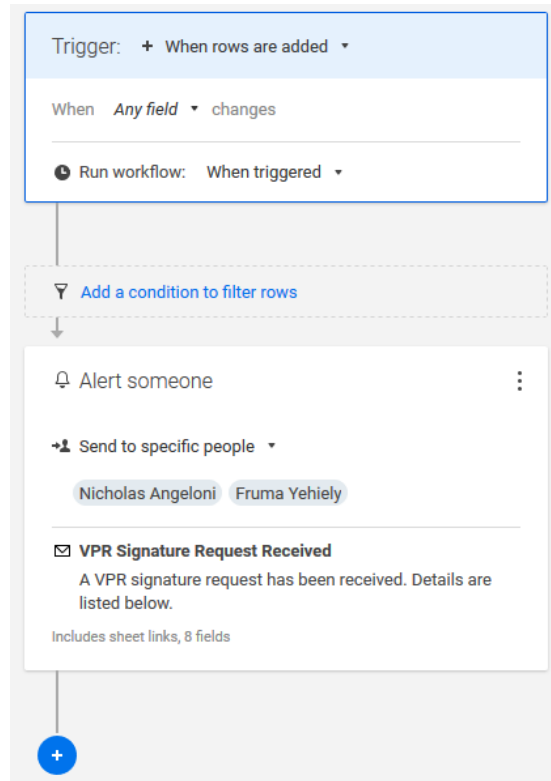
Edits or additions to sheet can trigger programmed events

Can cut down on the amount of email and follow-up needed

Workflows can trigger simple email alerts as well as requests for approval or updates

Smartsheet Licensing

Current license cost - **$349 per year per user**

– Group licenses are not currently available

– Northwestern admin is Joseph Kurtin

Licensed User	Free User
- Create, view, edit, update, and own sheets, templates, reports, workspaces, forms - Insert and delete columns, change column properties - Publish sheets, reports, dashboards	- View, edit, update sheets and reports (with appropriate permissions) - Serve as editor or admin - Cannot create new items - Cannot add columns to existing sheets

https://help.smartsheet.com/articles/520100-user-types

Key Takeaways

Smartsheet has additional features over Excel that allows for improved collaboration, documentation, and reporting of data

Forms, automation, and linkages in Smartsheet can improve data intake process, streamline workflow, and cut down on errors

URICA and OR are already using Smartsheet to improve processes

License is required to create new sheets but free users can collaborate on existing projects

Questions?

Contact Nick – n-angeloni@northwestern.edu

Learning Center –
   https://help.smartsheet.com/

Center of Excellence (Northwestern licensed) –
   https://learn.smartsheet.com/

Smartsheet Certification (normally $99) –
   https://excellence.smartsheet.com/