



# One 2 One Personalised Smartsheet Online Training Courses

## SMARTSHEET LIGHT:

Initial Smartsheet Discovery Review of Basics, Designing New sheets and Workflows, plus appreciation of Managing Projects in Smartsheet - Modules 1,2,3 and User Chooser choice of 4th Module

**Delivered via screenshare in 4 x 1.5 hour sessions per course = 6 hours**

Priced at **£450 plus VAT, \$650 or €600** payable in advance

## SMARTSHEET CHAMPION:

Advanced training in Managing Projects and Workflows in Smartsheet + SuperUser Training to become your company's Smartsheet Champion - Modules 1 to 9, adjusted to suit specific needs

**Delivered via screenshare in 9 x 1.5 hour sessions = 13 hours**

Priced at **£950 plus VAT, \$1,350 OR €1,300** payable in advance

[Book now](#) to secure your place

## Modules

Session No	Session Title	Content Subtitle	Duration in Hrs
1	Intro to Smartsheet Part 1	The Environment	1.5
2	Intro to Smartsheet Part 2	The Utilisation	1.5
3	Collaboration and Tracking Tools	Working Together	1.5
4	Accounts, Groups and Permissions	Managing your Account	1.5
5	Importing Data	Utilising existing/External data	1.5
6	Outputs	Reports, PDFs and Excel	1.5
7	Linking Sheets	Creating Dashboards and other uses	1.5
8	Calculations in Smartsheet	Uses and Limitations	1.5
9	Smart Graphs and other Apps	Working with other apps	1.5

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## Topics

Session No	Session Title	Content Subtitle	Duration in Hrs
1	Intro to Smartsheet Part 1	The Environment	1.5
	Orientation - Basics inc. overview of the screen and controls Useful tips, switch on and off, where to find Smartsheet technical help Setting up your Home Tab Inc. Workspaces and Folders Accessing Featured Templates and creating your own Creating a Blank Worksheet Field Types and their uses		
Session No	Session Title	Content Subtitle	Duration in Hrs
2	Intro to Smartsheet Part 2	The Utilisation	1.5
	Project Management in Smartsheet Create and Share a Project Sheet Project Management in Smartsheet using the latest hours/mins granularity Gantt Chart Settings and controls Inc. colour formatting Using Hierarchies to structure your data		
Session No	Session Title	Content Subtitle	Duration in Hrs
3	Collaboration and Tracking Tools	Working Together	1.5
	Import Contacts for collaboration Organizing work, designing Sheets and Workflows Help with best practise Notifications Alerts and Reminders Update Requests Attachments Discussions		

Session No	Session Title	Content Subtitle	Duration in Hrs
4	Accounts, Groups and Permissions	Managing your Account	1.5
	Understanding Permissions and User Types Resource Planning, analysis and management across teams and projects Leveraging the difference between USERS and CONTACTS Enabling / Disabling Resource planning functions Creating views of Resources utilised and resolving issues highlighted		
Session No	Session Title	Content Subtitle	Duration in Hrs
5	Importing Data	Utilising existing/External data	1.5
	Create Website SmartForms that populate your live sheets Import a sheet from Excel, Google or Microsoft Project Creating Linked Data Portfolio View/ Sky View /view of your business KPIs Copy/Move Rows Copy/Move Rows with Discussions and attachments Backups		
Session No	Session Title	Content Subtitle	Duration in Hrs
6	Outputs	Reports, PDFs and Excel	1.5
	Create Reports that reads across all of your Projects Understand the report Builder and how to get the best out of it SmartMerge Sheets to create PDFs for output, e.g. Contracts, Quotes. Portfolio View / Sky View - a Dashboard view of your business KPIs SmartStats and SmartGraphs from data collected in Smartsheet Publishing Sheets or Reports		

Session No	Session Title	Content Subtitle	Duration in Hrs
7	Linking and Identifying Data	Creating Dashboards and other uses	1.5
	Setting up your dashboard Inc. Workspaces and Folders		
	Designing Sheets that form part of your Workflows		
	Conditional Formatting		
	Filtering and Sorting		
	Searching & Find/Replace		
Session No	Session Title	Content Subtitle	Duration in Hrs
8	Calculations in Smartsheet	Uses and Limitations	1.5
	General Principles		
	Numeric & Text Formulas		
	Logic Formulas		
	Date Time Formulas		
	Formulas in Hierarchies		
Session No	Session Title	Content Subtitle	Duration in Hrs
9	Smart Graphs and other Apps	Working with other apps	1.5
	SmartStats and SmartGraphs from data collected in Smartsheet		
	Google Docs		
	Google Forms		
	Using ODBC in excel to link to Smartsheet		
	Sights		

*As Module 9 is quite wide ranging, it can be modified to focus on particular applications relevant to your use.  
Please discuss with your trainer.*