

SMARTSHEET MAGIC: WORK SMARTER, STREAMLINE, STRESS LESS



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CSU CHANCELLOR'S OFFICE

FOCUS

- Get familiar with Smartsheet – Overview
- How to get started
- Show-n-tell Smartsheet solutions
- How to get a Smartsheet license

SMARTSHEET SOLUTION

More than a Sheet – A Solution

Intake New Data
with Forms



Trigger Alerts
and Requests
with Automation



Customize Task
& Project Sheets



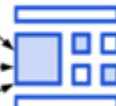
Create Filtered
Views with Reports



Summarize Key Data
with Cell Linking and
Cross-Sheet Formulas



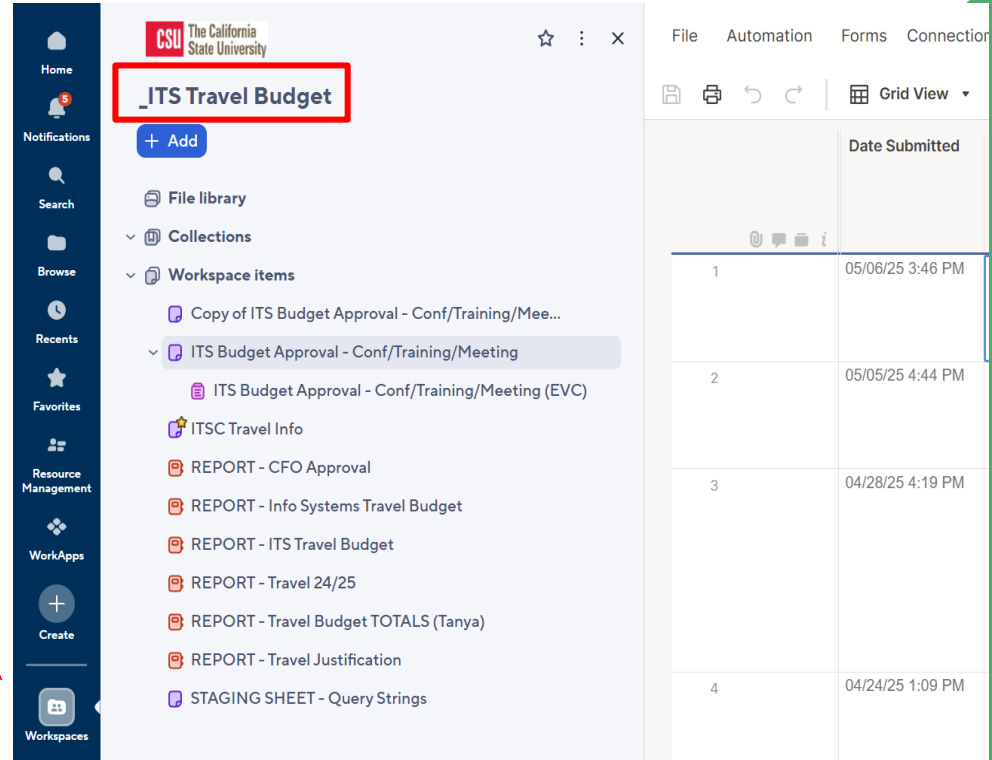
Design Personalized
Insights with Dashboards



SHEETS

- A "sheet" is basically like a super-powered spreadsheet
- Each **row** is like a mini project or task.
- Each **column** holds different information (like assignees, dates, status, etc.)

WORKSPACES



The screenshot displays the CSU Workspaces interface. On the left is a dark blue sidebar with navigation options: Home, Notifications, Search, Browse, Recents, Favorites, Resource Management, WorkApps, Create, and Workspaces. A red arrow points to the 'Workspaces' icon at the bottom of this sidebar. The main content area shows the 'ITS Travel Budget' workspace, which is highlighted with a red box. Below the workspace name is a '+ Add' button. A list of items is shown under 'Workspace Items', including 'Copy of ITS Budget Approval - Conf/Training/Mee...', 'ITS Budget Approval - Conf/Training/Meeting' (selected), 'ITS Budget Approval - Conf/Training/Meeting (EVC)', 'ITSC Travel Info', and several 'REPORT' items. On the right, a table displays a list of items with their submission dates.

	Date Submitted
1	05/06/25 3:46 PM
2	05/05/25 4:44 PM
3	04/28/25 4:19 PM
4	04/24/25 1:09 PM

ACTIONS IN ROWS

File Automation Forms Connections Dynamic View ISAC Spring F2F - Feb 21 - 22, 2024 ☆

Grid View Filter Arial 10 B I U G A

Task	Priority Level	Stat...	Task Category	Completed	Contact
es					
gg Conf Ctr					
u.service-now.com/c			Meeting Space	✓	Ivy Harris
			Meeting Space	✓	Imelliott1@cpp.e
			Meeting Space	✓	
www.vitalosangeles	Medium		Food & Beverage	✓	(909) 348-5900 Jasm
et			Food & Beverage	✓	
on form			Food & Beverage	✓	nbodine@calstat
oval form			Food & Beverage	✓	ROBYN PENNIN
	Medium		Food & Beverage	✓	Blanca Molina
			Food & Beverage	✓	
ock	High		Hotel	✓	Ivy Harris
ooms	High		Hotel	✓	
sy Room Block			Hotel	✓	
ation			Registration	✓	
			Registration	✓	
			Registration	✓	
			Registration	✓	printservices@ca
			Registration	✓	printservices@ca
			Registration	✓	
service-now.com)					
id????			A/V Needs	✓	
			A/V Needs	✓	

Insert Above Insert Key

Insert Below

Cut Ctrl + X

Copy Ctrl + C

Paste Ctrl + V

Edit...

Delete

Sort Rows...

Lock

Move to Another Sheet...

Copy to Another Sheet

View Row in Card View

Attachments... Ctrl + M

Comments...

Generate Documents... New

Proofs...

Set Reminder...

Send...

Print...

Send Update Request...

Properties...

ACTIONS IN CELLS

File Automation Forms Connections Dynamic View ISAC Spring F2F - Feb 21 - 22, 2024 ☆

Grid View Filter Arial 10 B I U G A

Task	Priority Level	Stat...	Task Category	Completed	Contact
Total # of Attendees					
BUDGET					
Cal Poly Pomona --- Kellogg Conf C					
Location secured https://csu.service-n				✓	Ivy Harris
Send out SAVE THE DATE				✓	Imelliott1@cpp.e
Send out calendar invite				✓	
Food and Beverage					
Dinner - whole group https://www.vital				✓	(909) 348-5900 Jasm
Complete Budget Worksheet				✓	
Obtain Natalie's signature on form				✓	nbodine@calstat
Complete Hospitality Approval form				✓	ROBYN PENNIN
Order food				✓	Blanca Molina
Confirm food/pay				✓	
Hotel					
NONE					
Secure Courtesy Room Block				✓	Ivy Harris
Send out survey for hotel rooms				✓	
Send Reminder for Courtesy Room Bl				✓	
Registration					
Create Smartsheet registration				✓	
Send out registration				✓	
Send out reminder - 1 week out				✓	
Sign in sheets				✓	
Tent Cards				✓	
Badges				✓	printservices@ca
List of attendees printed out				✓	printservices@ca
A/V Support (https://csu.service-n					
Microphone (2 --- hand-held)????				✓	
Extension Cords (8-10)				✓	

Cut Ctrl + X

Copy Ctrl + C

Paste Ctrl + V

Paste Special... Ctrl + Shift + V

Clear Contents

View Cell History...

Insert Row Insert Key

Delete Row

Add a Row Comment

Row Actions...

Indent Ctrl +]

Outdent Ctrl + [

Insert Image

Generate formula

Generate content

Link from Cell in Other Sheet...

Manage References...

Hyperlink... Ctrl + K

Convert to Column Formula

FORMS

CSU The California State University

ISAC Face-2-Face June 2020

June 24-25
\$100 Registration Fee
Location: Camp SLO, CA

Campus/Organization *

Select ▼

First Name *

Last Name *

Email Address *

Position/Title

If you have any special dietary needs, please list them here. If you do not have any, please indicate so. *

Select ▼

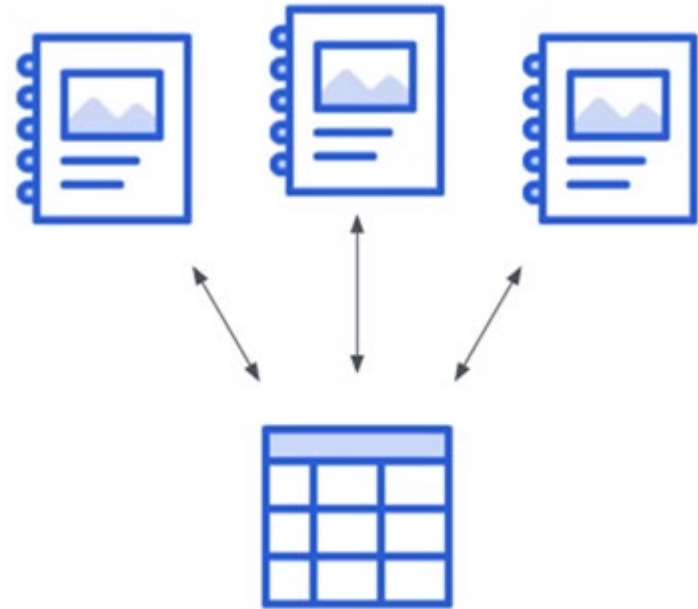
Comment

All CSU Campus and Chancellor's Office employees must use a Cash Posting Order (CPO) to pay for registration. A CPO is the required method for moving money between campuses and the Chancellor's Office.

To accomplish this, please input your chartfield string here. The chartfield string is a series of

REPORTS

- Filtered view of sheet data
- Based on specific criteria
- Bidirectional, interactive



DASHBOARDS

Asset Management DASHBOARD

CSU The California State University
OFFICE OF THE CHANCELLOR

OVERVIEW

COMPUTER REFRESHES

361
OVERDUE

1
DUE SOON

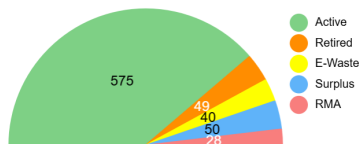
ASSET SEARCH



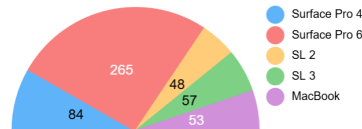
E-WASTE / SURPLUS

90

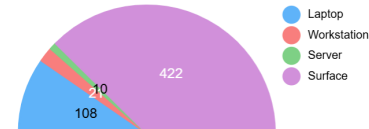
ASSET STATUS



LAPTOP TYPE



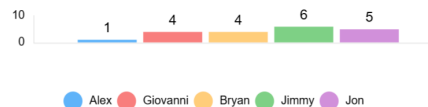
ASSET TYPE



ORDERS PENDING

40

ROLLOUT ASSIGNMENTS



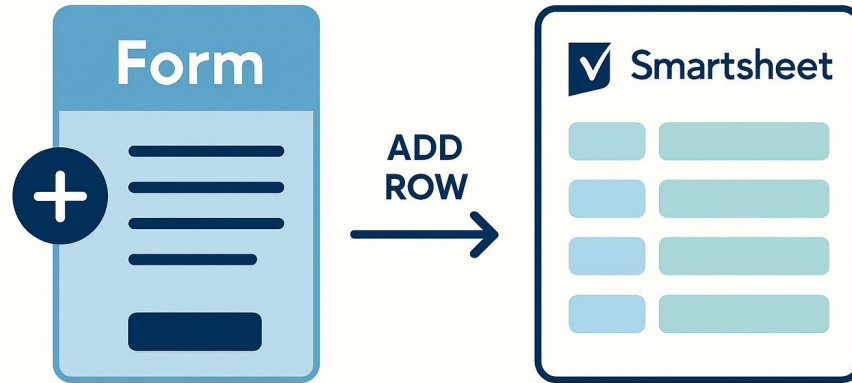
UNALLOCATED ASSETS

8

Where to Start?

MAKE A FORM

CREATE FORM IN SMARTSHEET



**SMARTSHEET
SOLUTION**

BANNER DATA ENTRY DASHBOARD

Project Dashboard

Athena Quarles
Project Manager

At Risk

A) FFAMAST



B) FFAADJF



Status

In Progress

D) ACCUM



C) FFADEPR



Overview

Project:
LEGACY
Project Name

06/02/25
Start Date

06/30/25
End Date

Estimated Effort in Days

Initiation	Planning	Launch
17	27	10

Resource Allocation By Phase

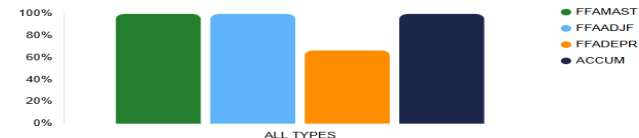
Data Entry Progress

TOTAL RECORDS IMPROVEMENTS	260
ENTERED: FFAMAST	260
ENTERED: FFAADJF	260
ENTERED: FFADEPR	260
ATHENA - FFAMAST	0
DANILO - FFAMAST	60
PEGGY - FFAMAST	50
AARON - FFAMAST	98
CHRISTINA - FFAMAST	50
JASMINE - FFAMAST	0

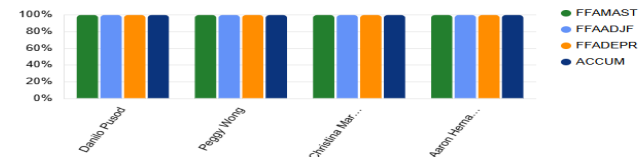
OVERALL DATA SUMMARY

TOTAL RECORDS IMPROVEMENTS	260
TOTAL IMPROVEMENTS US\$	\$26,947,057.68
TOTAL BUILDINGS US\$	\$24,524,710.00
TOTAL LAND US\$	\$16,520,068.00

COMPLETION LEVEL PER PHASE



PROGRESS CHART



HEISC TOOL DASHBOARD



Welcome to the ISO HEISC Tool Dashboard!

Click on the campus logo to access your HEISC Tool

Only users with the appropriate campus email domains will be able to access their campus HEISC Tool. Once you click on the logo, it will take you to your campus HEISC Tool, where you can review, and update the information.



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ANNUAL CONFERENCE

ITS DASHBOARD

CSUCO ITS

ITS ANNOUNCEMENTS

PER STEVE RELYEA: ALL BUSINESS TRAVEL IS ON HOLD FOR B&F STAFF

PERFORMANCE EVALUATIONS:

- MPP Evals Due - Aug 14 (**Self-Appraisals are required)
- Represented Evals Due - Aug 22

ACCOUNT CODING



CAL STATE TECH CALENDAR



CSU - ITS LOGO



CSU - ITS POWERPOINT



FACILITIES REQUEST



HR CONTACTS



ITS ORG CHART



ITS SHAREPOINT SITE



ICP/MPP SALARY REVIEW



NEW EMPLOYEES



OFFICE SUPPLIES - CO HYBRID



OFFICE SUPPLIES - REMOTE ONLY



PAYROLL CALENDAR



SOFTWARE



TECH EQUIPMENT



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IMPACT OF SMARTSHEET

- Snowball effect: How solutions in Smartsheet can transform other areas within a campus or organization
- Back to the Stone Age without Smartsheet

LICENSE INFO

- Interacting with Smartsheet --- [licensed users vs. free collaborators](#)
- Licenses cost \$625 per user/per year
- Access to Premium Apps
- Licenses will be purchased/assigned for a 1-year period
 - You have the option to re-assign a license if current license holder no longer needs it or separates
- Complete the [License Request form](#)



2026 ANNUAL CONFERENCE OAKLAND, JANUARY 11 - 13

AUXILIARY ORGANIZATIONS ASSOCIATION

THE NEXT ERA OF AUXILIARIES
SHAPING TOMORROW

THANK YOU!

