# SMARTSHEET MAGIC: WORK SMARTER, STREAMLINE, STRESS LESS

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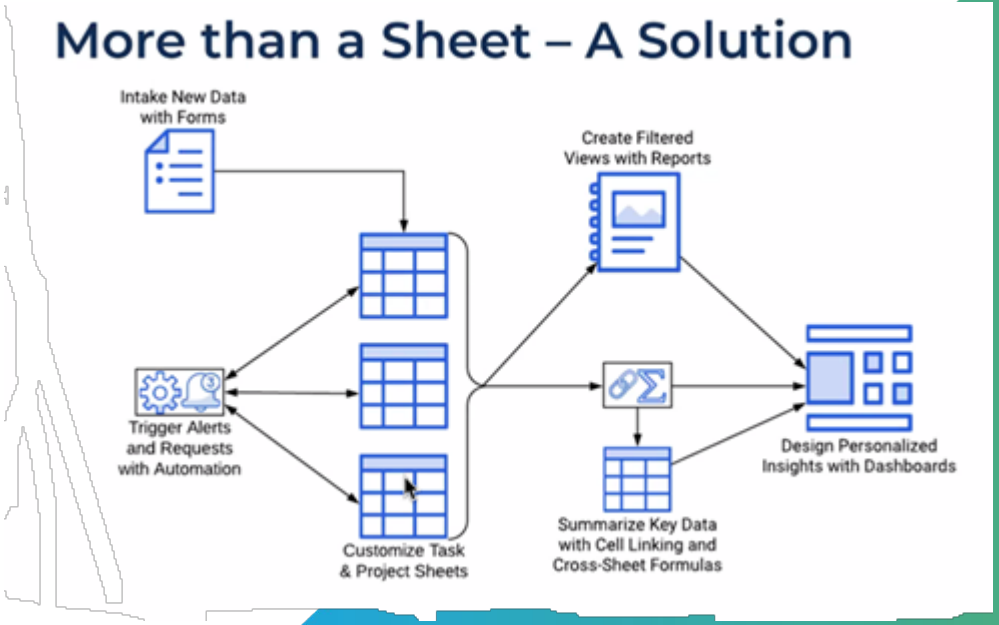
# FOCUS

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

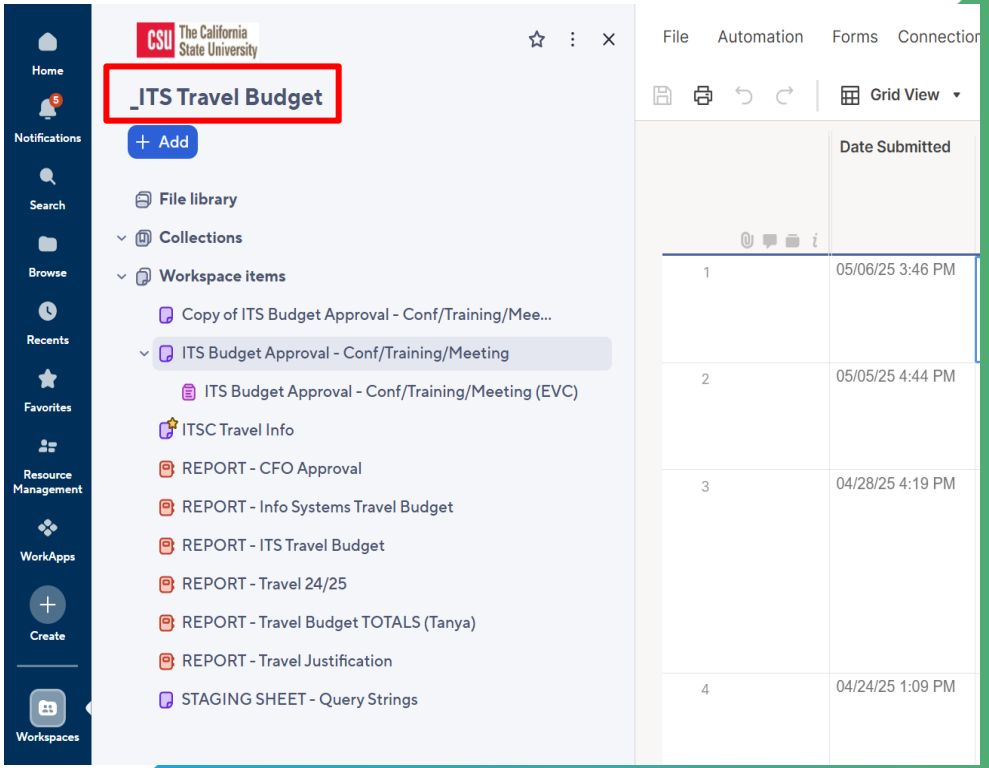
# SMARTSHEET SOLUTION



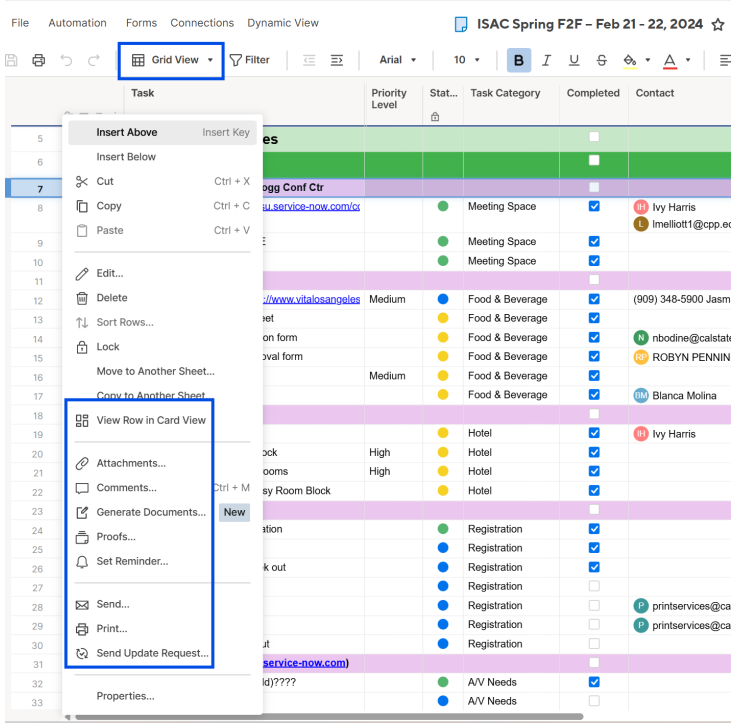
# SHEETS

- 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.)

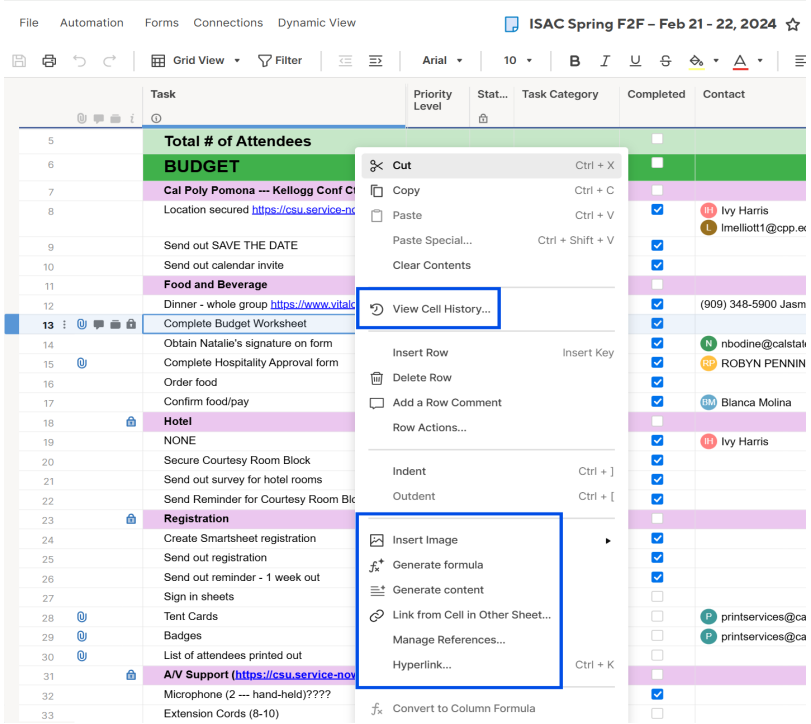
# WORKSPACES


Home
Notifications
Search
Browse
Recents
Favorites
Resource Management
WorkApps
Create
Workspaces
The California State University
_ITS Travel Budget
Add
File library
Collections
Workspace items
Copy of ITS Budget Approval - Conf/Training/Mee...
ITS Budget Approval - Conf/Training/Meeting
ITS Budget Approval - Conf/Training/Meeting (EVC)
ITSC Travel Info
REPORT - CFO Approval
REPORT - Info Systems Travel Budget
REPORT - ITS Travel Budget
REPORT - Travel 24/25
REPORT - Travel Budget TOTALS (Tanya)
REPORT - Travel Justification
STAGING SHEET - Query Strings
File
Automation
Forms
Connection
Grid View
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

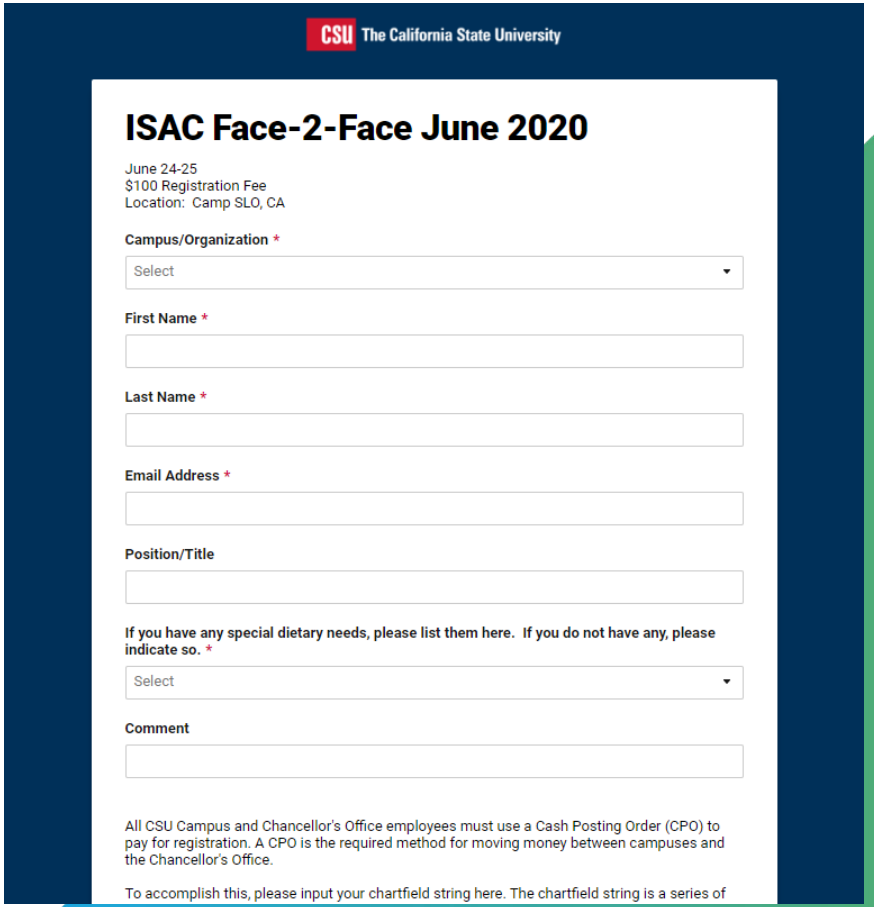
# ACTIONS IN ROWS




# ACTIONS IN CELLS

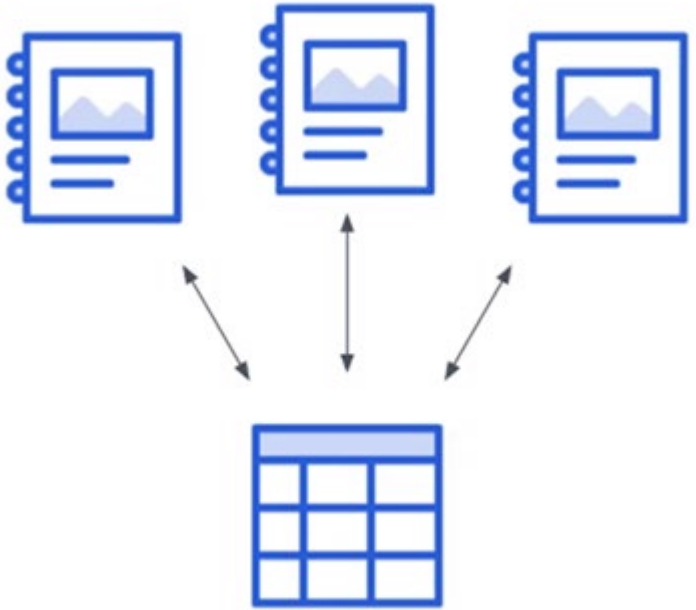


# FORMS

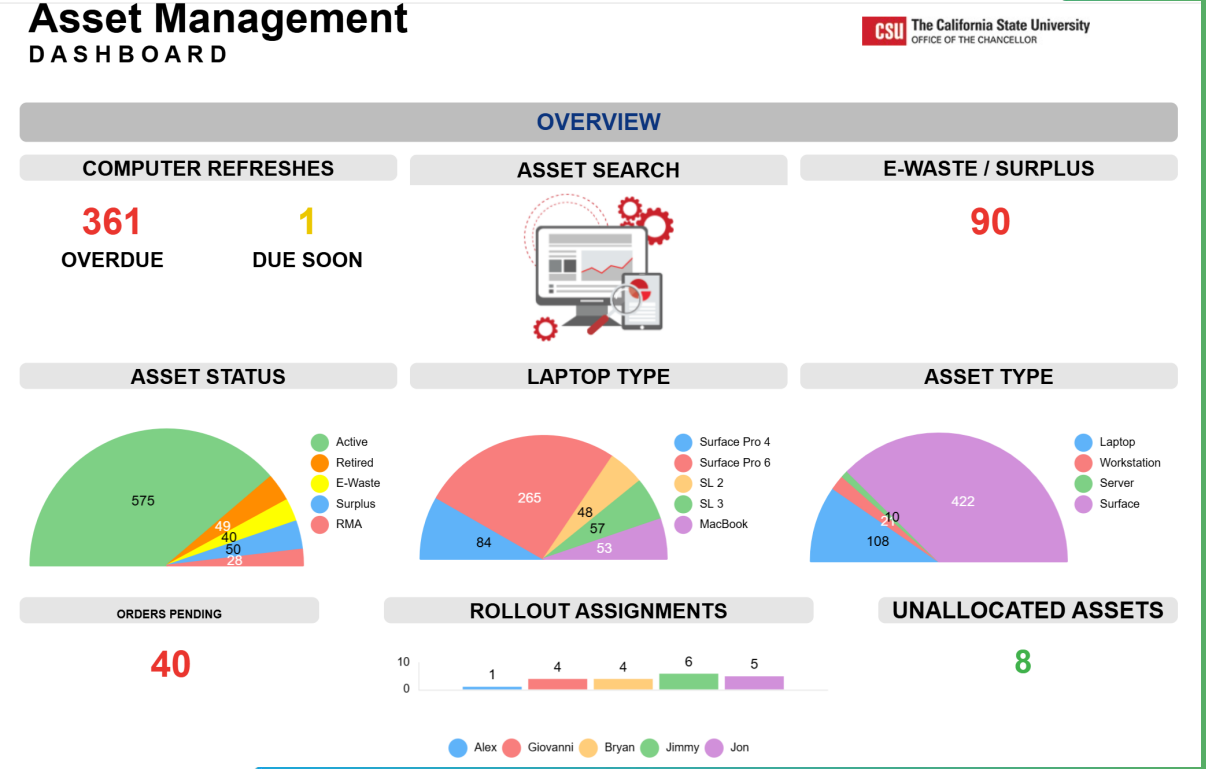

CSU The California State University
ISAC Face-2-Face June 2020
June 24-25
$100 Registration Fee
Location: Camp SLO, CA
Campus/Organization *
Select
First Name *
Last Name *
Email Address *
Position/Title
If you have any special dietary needs, please list them here. If you do not have any, please indicate 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

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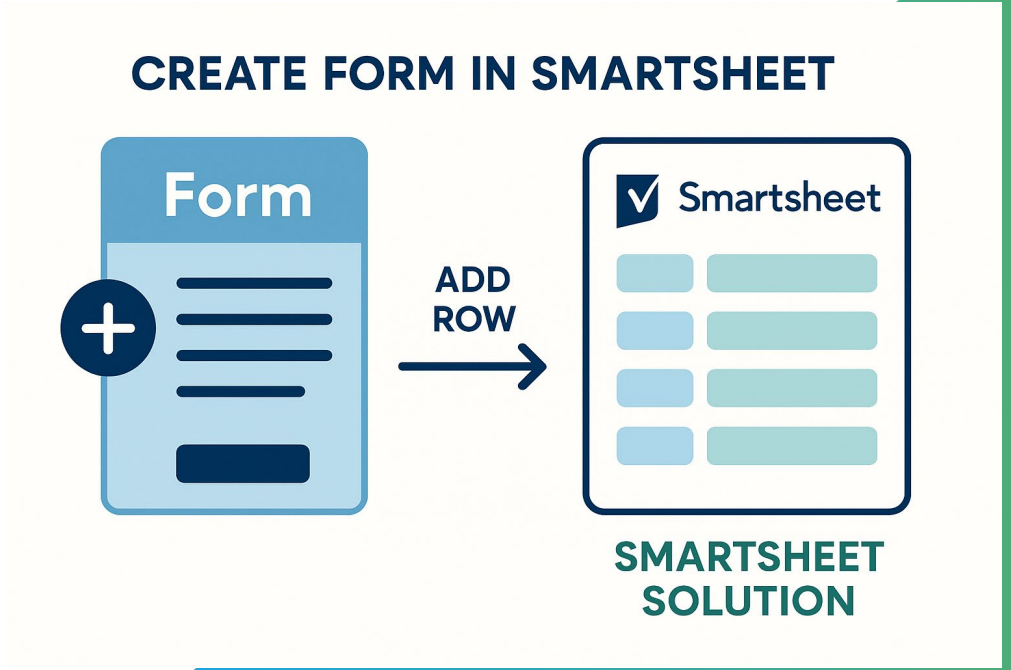
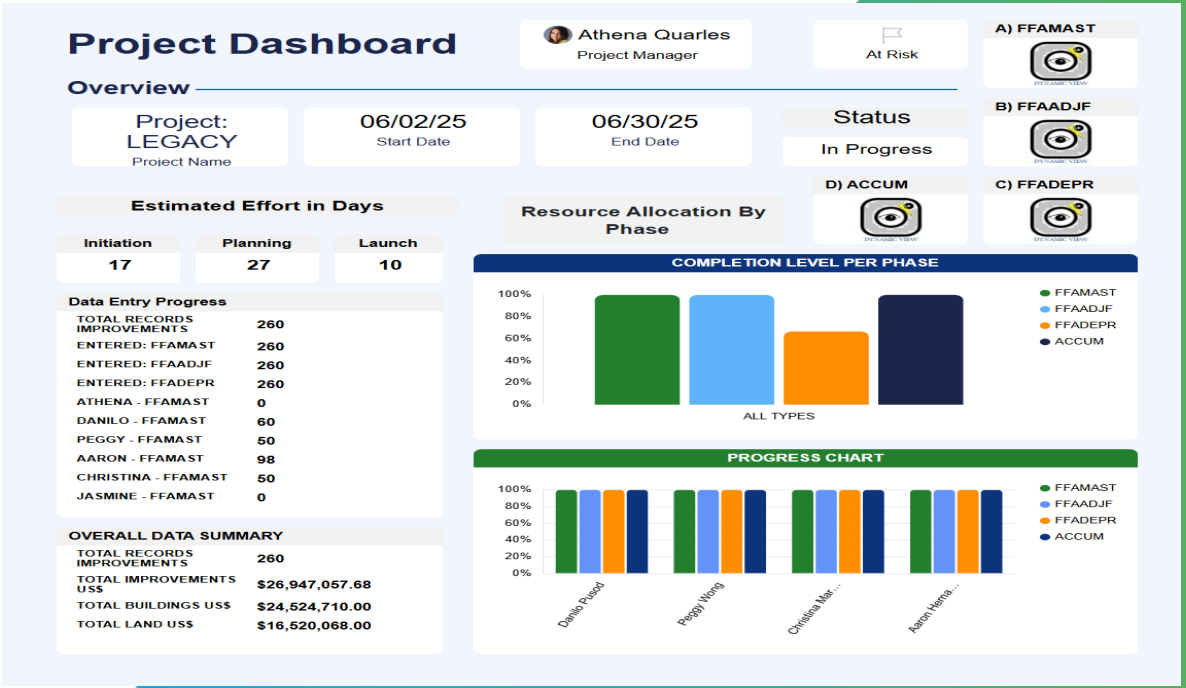
# Where to Start?
# MAKE A FORM



# BANNER DATA ENTRY DASHBOARD

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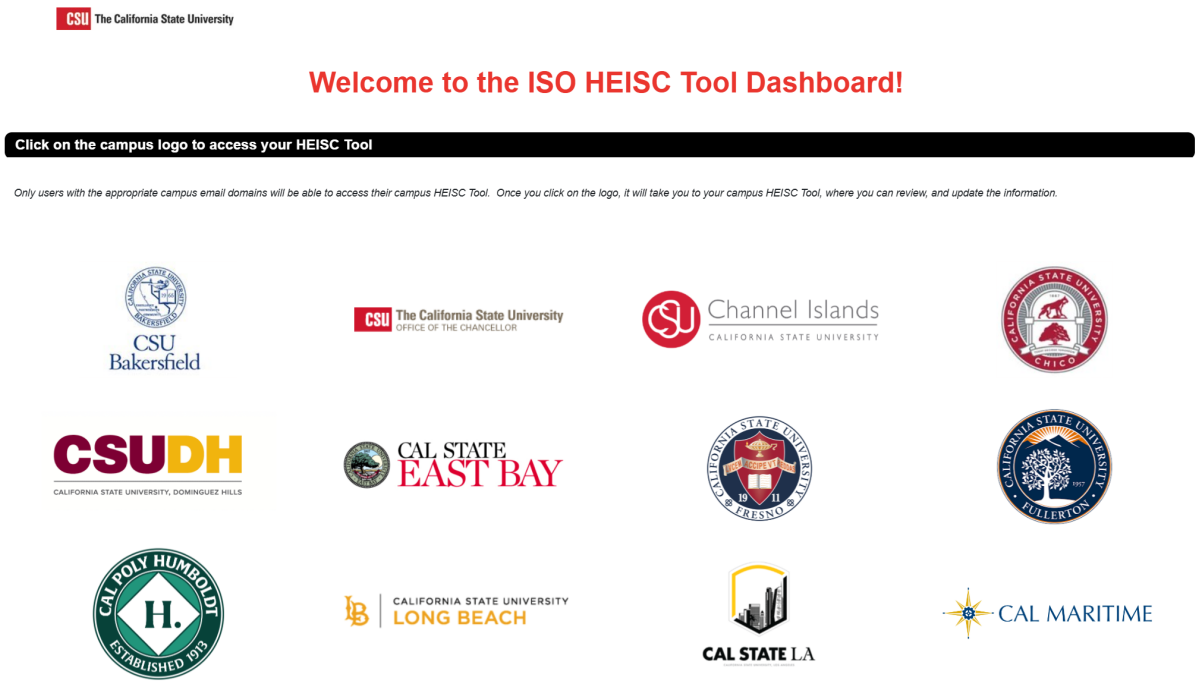
# HEISC TOOL DASHBOARD

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# 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 The California State University INFORMATION TECHNOLOGY SERVICES

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

AUXILIARY ORGANIZATIONS ASSOCIATION

THE NEXT ERA OF AUXILIARIES
SHAPING TOMORROW

# THANK YOU!