

SMARTSHEET MAGIC: WORK SMARTER, STREAMLINE, STRESS LESS



PRESENTED BY
ATHENA QUARLES
SAN DIEGO STATE
KAREN MALONE
CSU CHANCELLOR'S OFFICE

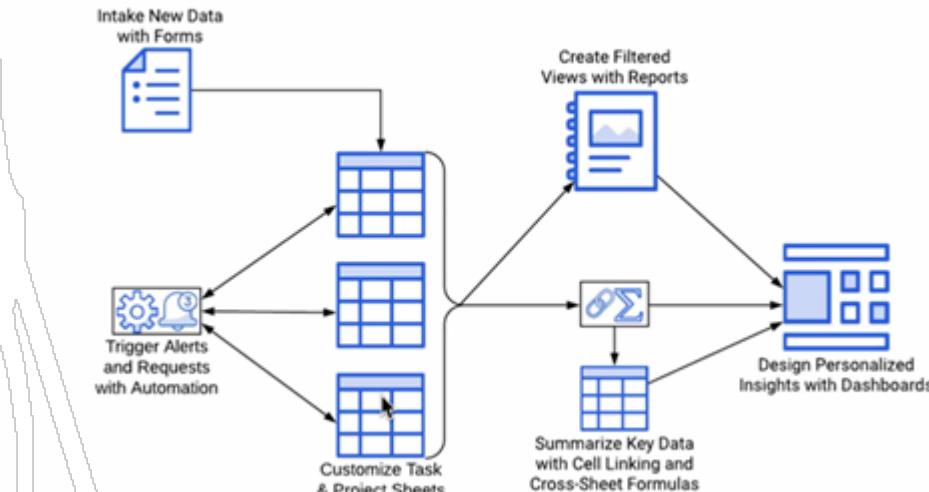


FOCUS

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

SMARTSHEET SOLUTION

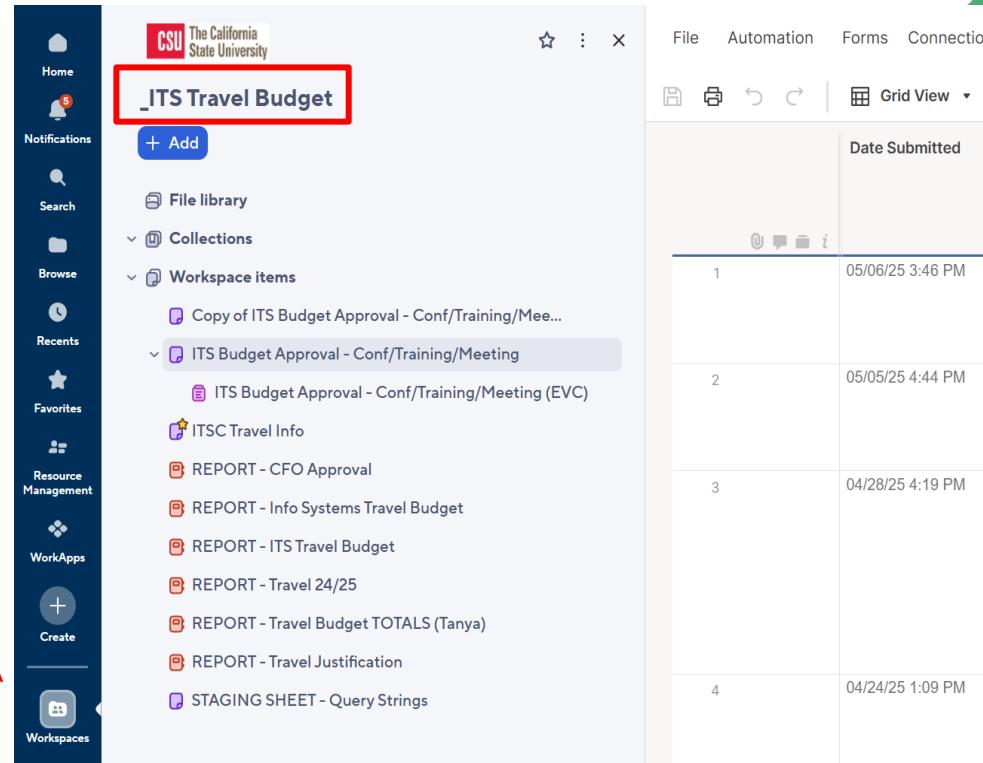
More than a Sheet – A Solution



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 shows a workspace interface for The California State University. The left sidebar includes Home, Notifications, Search, Browse, Recents, Favorites, Resource Management, WorkApps, Create, and Workspaces. The main area displays a list of workspace items, with one item, "ITS Travel Budget", highlighted with a red box. A red arrow points from the bottom left towards this highlighted item. To the right, a grid view shows four rows of submitted reports, each with a number, date, and a small icon.

	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

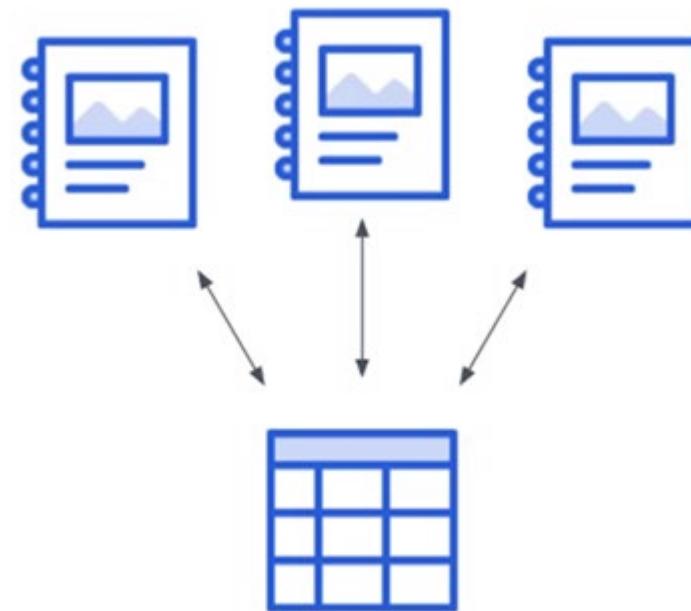
Comment

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

Asset Management DASHBOARD

CSU The California State University
OFFICE OF THE CHANCELLOR

OVERVIEW

COMPUTER REFRESHES

361
OVERDUE

1
DUE SOON

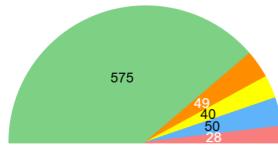
ASSET SEARCH



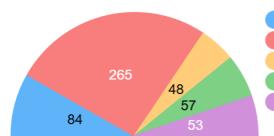
E-WASTE / SURPLUS

90

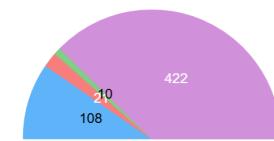
ASSET STATUS



LAPTOP TYPE



ASSET TYPE



ORDERS PENDING

40

ROLLOUT ASSIGNMENTS

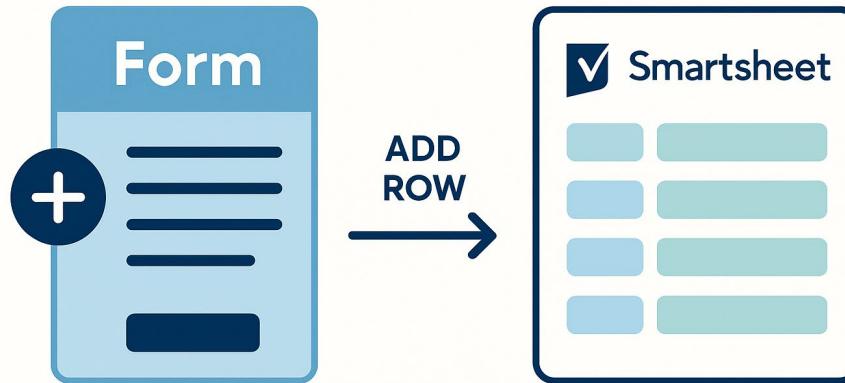


UNALLOCATED ASSETS

8

Where to Start? MAKE A FORM

CREATE FORM IN SMARTSHEET



SMARTSHEET
SOLUTION

BANNER DATA ENTRY DASHBOARD

Project Dashboard

Overview

Project: LEGACY Project Name	06/02/25 Start Date	06/30/25 End Date	Status In Progress
--	------------------------	----------------------	-----------------------

Estimated Effort in Days

Initiation	Planning	Launch
17	27	10

Data Entry Progress

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

Resource Allocation By Phase

COMPLETION LEVEL PER PHASE

PROGRESS CHART

HEISC TOOL DASHBOARD

 The California State University

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.



 The California State University
OFFICE OF THE CHANCELLOR



CSUDH
CALIFORNIA STATE UNIVERSITY, DOMINGUEZ HILLS

 CAL STATE
EAST BAY



 CALIFORNIA STATE UNIVERSITY
LONG BEACH



 CAL MARITIME

 **2026 AOA**
ANNUAL CONFERENCE

ITS DASHBOARD

CSUCO ITS

ITS ANNOUNCEMENTS

PER STEVE RELYEYA: 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



PAYOUT CALENDAR



SOFTWARE



TECH EQUIPMENT



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!

