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ENGAGE'20 Fundamentals of Getting Started

Erin Harlan
Sr. Manager, Product Marketing, Smartsheet

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Welcome!

Learning objectives

1. Learn what Smartsheet is and what types of problems the platform solves.
2. Define the key building blocks of Smartsheet and the relationship between the components.
3. Understand the difference between user type and sharing permission.



Erin Harlan

Sr. Manager, Product Marketing,
Smartsheet

Today's work environment looks a lot different than it used to.

MORE COMPLEXITY. *Multiple workstreams, systems and processes.*

CONSTANT CHANGE. *Shifting focus leads to wasted budgets.*

DISPERSED TEAMS. *Distributed, remote, and multidisciplinary workforce.*

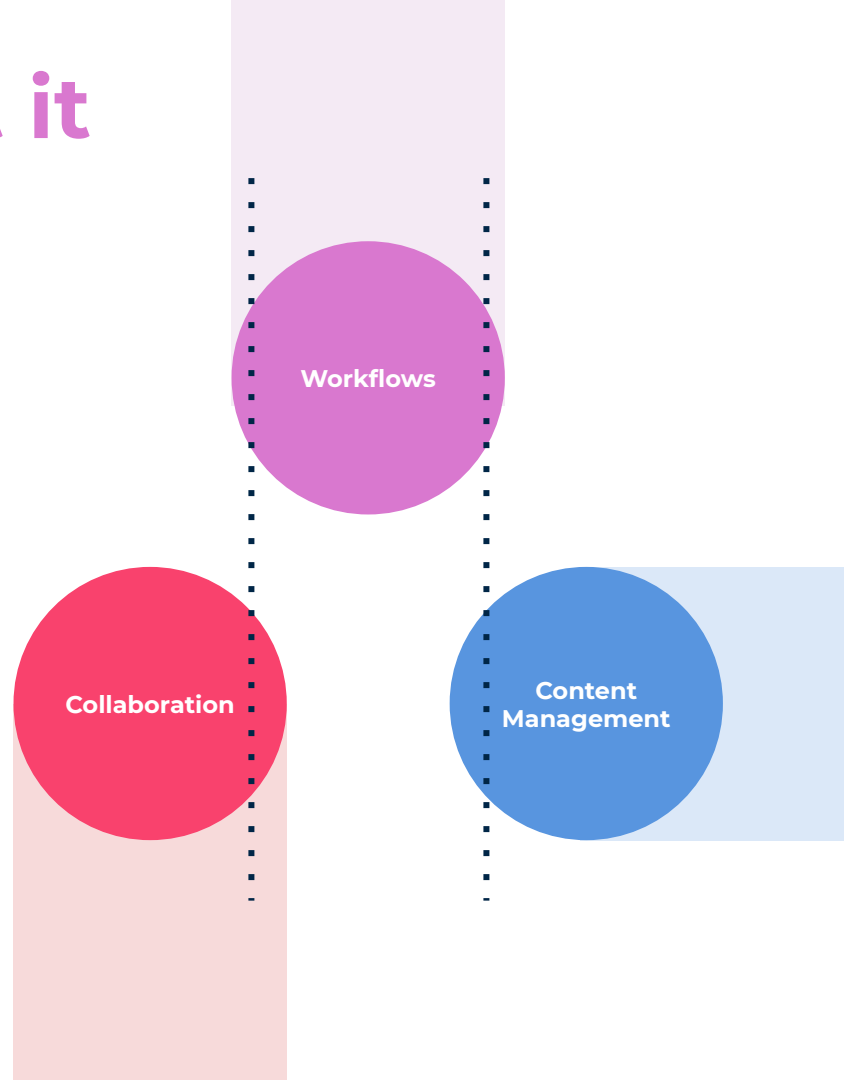
BLURRED BORDERS. *Work spans partners, vendors, and departments.*

FASTER OUTPUT. *More deliverables and tight timelines than ever before.*

The old way won't cut it

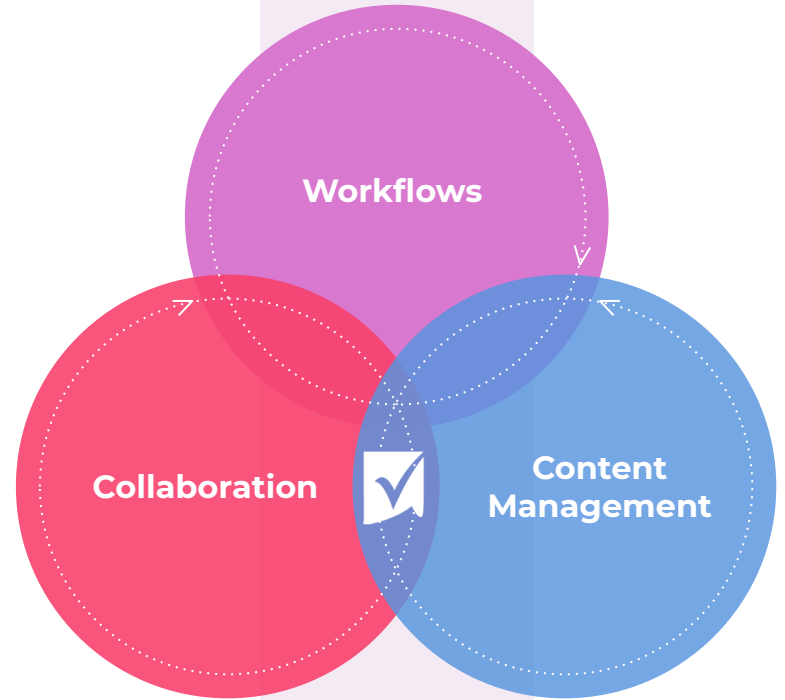
Collaboration, workflows and content management are locked in siloed applications — creating gaps and inefficiencies, and leaving the enterprise ill-prepared for a new reality.

In other words, the world has changed, but we're still working the same way.



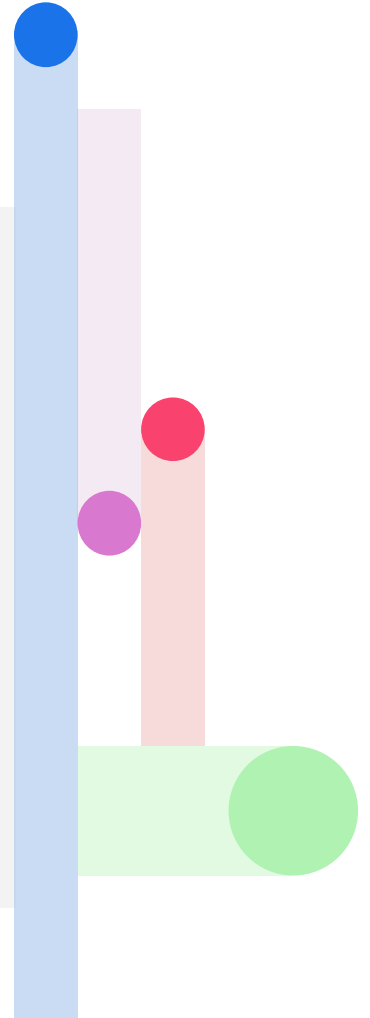
The answer

Smartsheet
transforms work
into dynamic work.

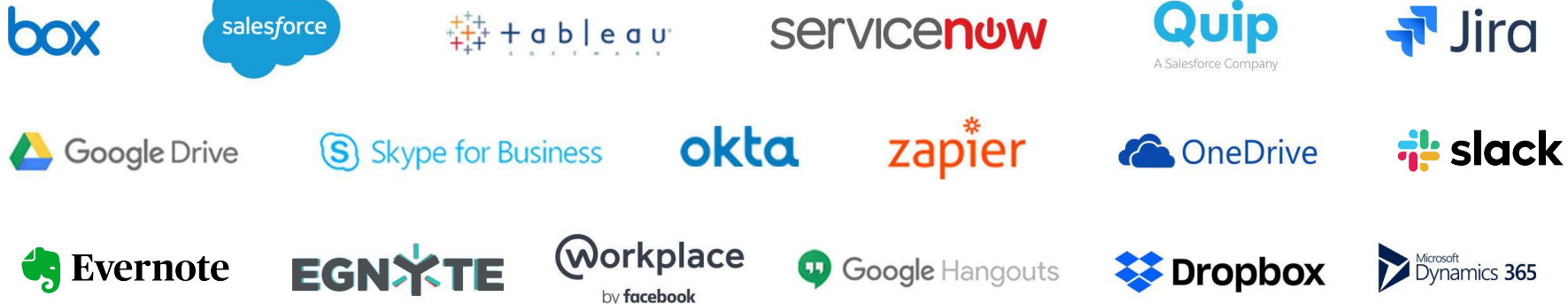


Smartsheet is a platform for dynamic work

Smartsheet transforms work into dynamic work, unifying collaboration, workflows, and content management into a flexible, secure, no-code platform that gives anyone the ability to continuously make an impact—so the enterprise can compete in a transformed world.

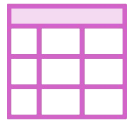


Integrates with leading cloud apps



Smartsheet building blocks

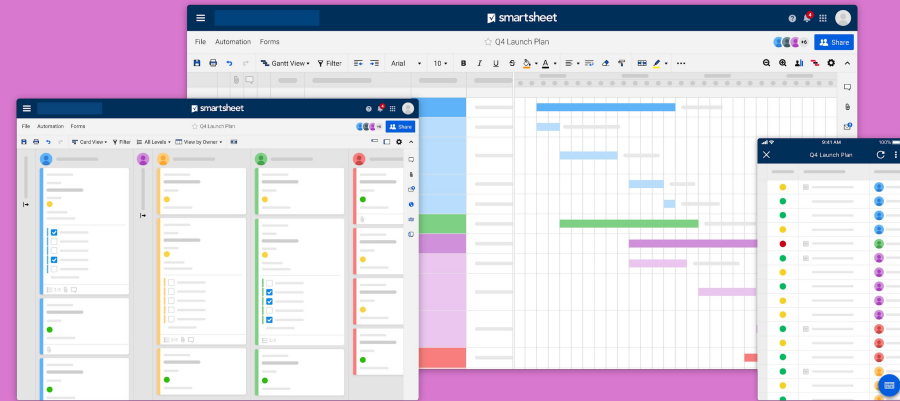




Sheets

Key capabilities:

- Serves as the foundation of your work where all of your data resides.
- View as a grid, calendar, in card view, or as a Gantt chart.
- Track different types of data with column types.
- Use formulas for aggregation and calculation.
- Attach files, proof content, and manage conversations with your team.
- Set up automated workflows to let Smartsheet do work for you.





Forms

Key capabilities:

- Standardize and streamline the collection of data from anyone and take action on it.
- Customize field properties.
- Use conditional logic.
- Use custom branding and colors.
- Access via mobile app for on-the-go data collection.
- Share via email, hyperlink, embed in a dashboard, or publish to a website.

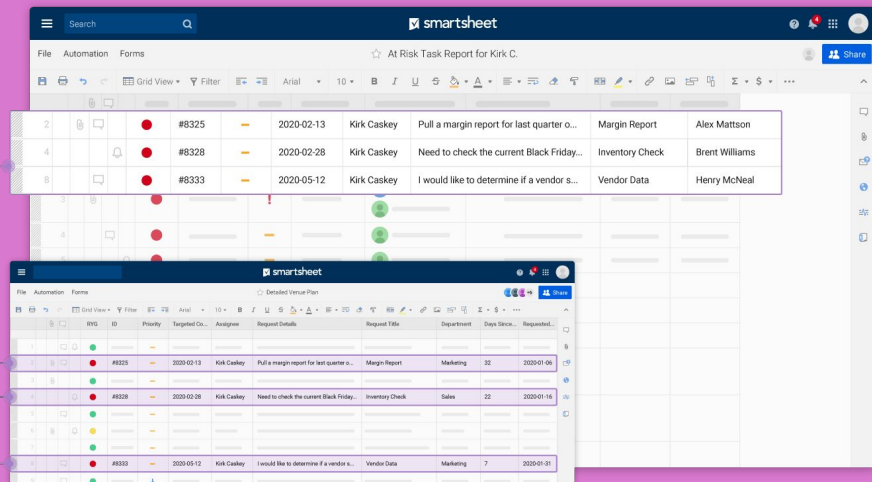
The screenshot displays the Smartsheet Forms interface. On the left, a sidebar shows 'Fields' and 'Form Elements' sections. The main area is titled 'Form' and 'Settings', with a 'smartsheet' logo. It shows a form titled 'Request Form' with fields for 'Your Name', 'Request Type', 'Department', 'Request Description', and 'Date Needed By'. A 'Send me a copy of my responses' checkbox is at the bottom. On the right, a mobile app view of the same form is shown, with a 'Request Form' title and the same fields. The mobile app interface includes a status bar at the top showing '10:41 AM' and '100%' battery.



Reports

Key capabilities:

- Easily work across multiple sheets from one place with a bi-directional, high-level view.
- Answer key business questions with custom criteria.
- Display in grid, Gantt, or calendar view.
- Group and summarize information.
- Share, send as a PDF, or publish.
- Display on a dashboard.

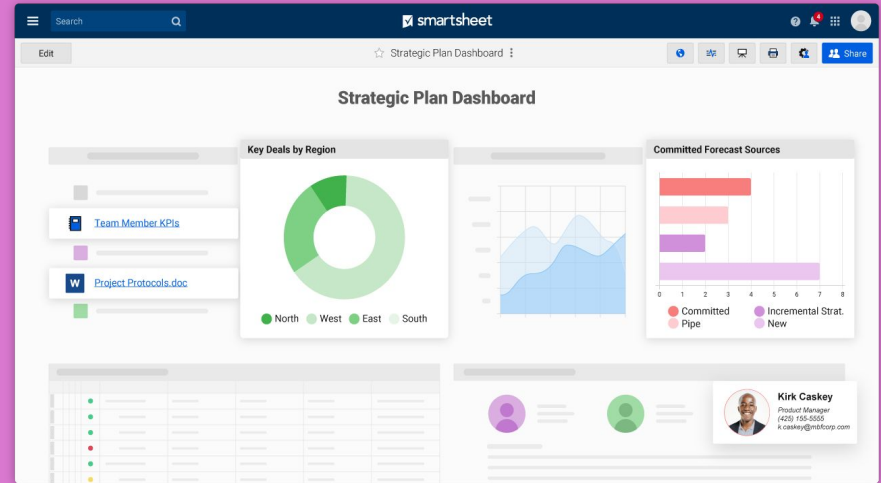




Dashboards

Key capabilities:

- Communicate the right information, to the right people, at the right time.
- Surface key metrics without exposing underlying data.
- Build charts to visualize trends and metrics.
- See live, real-time updates to data as it changes.
- Embed web content including videos, forms, and other applications.
- Use as a portal to centralize resources for your team.



Smartsheet user types

Licensed user

Can create, own, and administer new sheets, forms, reports, and dashboards, and share them with others.

Free user

Can be shared as a viewer or editor to existing sheets, reports, and dashboards in order to collaborate with a team.

Sharing permissions

Owner

*Licensed
user*

Admin

*Licensed
user*

Editor

Viewer



Resources

1. Smartsheet Help & Learning Center

www.help.smartsheet.com

2. Smartsheet Training & Certification

www.smartsheet.com/training

3. Smartsheet Community

www.smartsheet.com/community

Q&A

**Thank
you**



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