

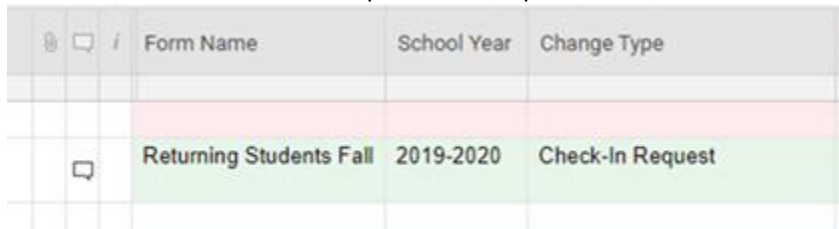
Smartsheet Tips – Using the Smartsheet for Your Project

- Add SmartSheet to your list of safe senders/safe sites to ensure all correspondence comes to you!
- Bookmark this sheet in your browser for ease of access.
- Click the icon in the top right corner of the sheet and selecting Personal Settings. Under Settings, check both boxes for Auto-Save:

Auto-save Settings

- Auto-save after 1 minute of inactivity
- Auto-save my changes when I leave a sheet, report, or dashboard

- I have enabled a feature that highlights any changes made to the sheet since the last time you logged in in yellow. This feature quickly calls your attention to what's new!
- You will be interacting with the part of the sheet underneath the light orange bar called **ACTIVE REQUESTS**. Please do not manipulate information above this bar, as the **MILESTONES** section of the sheet helps my team of specialists (and you!) to keep track of upcoming deadlines within your active project(s).
- When entering a request, use the dropdowns to choose the Form Name, School Year, and Change Type. This tells us exactly what you need and for which form(s).
- Some of the Change Type options include:
 - Request form revisions (much like you would have on the Excel spreadsheets from seasons past)
 - Request updates to your data delivery
 - Request additional administrative/workspace updates
 - Specify launch dates and/or update who the best contact is for this and future projects
 - And, request a check-in via phone or Zoom with a specialist on my teamWhen all the aforementioned pieces are in place the row in the sheet will look something like this:



	Form Name	School Year	Change Type
	Returning Students Fall	2019-2020	Check-In Request

- See the callout bubble in the example above? We'll use this area to have an exchange about your request much like we have via email. Using the @ symbol with my email address afterwards (ex: katie.mowery@powerschool.com) calls out to me specifically. I get an email notification every time you mention me. When I or a member of my team responds back, we'll use the same method of mentioning you so that you also get an alert via email. If you do not mention someone on my team using @, we will not see your comment until the next time we access your sheet.
- Other fields worth mentioning are as follows:
 - Applicable Form Field(s) – If you are requesting a revision to your form, noting the form field (stu_...) helps us to better identify where this change should take place.
 - Request Description – This is where the meat of your request will go. Be as descriptive as possible. This will prevent the necessitation of a back-and-forth, thereby increasing efficiency in addressing your request.
 - SIS Field to Map (leave blank if no delivery) – If we're adding a new field to your form or changing the way we've delivered data from a field, please provide us with the table/extension and field in your database for configuration.
 - Client Confirms Complete Date – Once I or a member of my team has notified you that your request has been completed, you'll need to review the change. If it has been completed as specified, please enter the current date in this field. This crosses off the row, thereby marking it as complete!

I know this is a substantial change, but I am confident that in streamlining our communication, project timelines and tasks, and other processes, we'll all be able to provide you with Grade-A service!