smartsheet

Project Management with Smartsheet

Course details

This course is designed for existing and emerging project managers, as well as anyone who is involved in projects or change management. It's ideal for project managers, project coordinators, team leads, functional managers, program managers, and project team members. Upon successful completion of this course, one will be able to use Smartsheet to successfully initiate, execute, control and close projects.

Length: Twelve hours (Three 4-hour sessions)

Format: Virtual Classroom

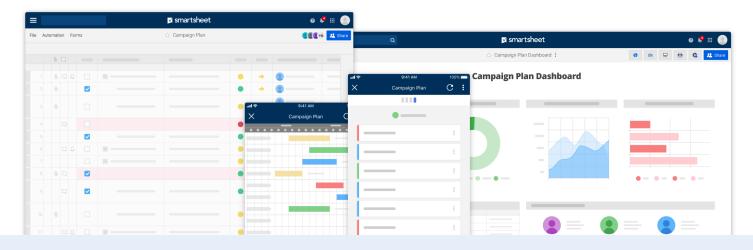**Recommended Prerequisites:** Smartsheet 201 or equivalent knowledge

Level: Advanced Smartsheet Knowledge

Course includes

- Hands-on activities and materials shared with your Smartsheet account
- PDF workbook containing key concepts of each topic covered
- You will earn a maximum of 12 PDUs for this course. For additional information, please click here.

You'll learn how to

- Implement automation to save time and increase efficiency
- Establish dependent relationships between tasks to keep project plans up to date
- Track resource availability across multiple projects
- Communicate key metrics to stakeholders
- Roll up information to keep track of data at the program or portfolio level

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Course Outline

Creating the Project Sheet

- Create a new project file using Import, Template and Save as New options
- Transfer the Work Breakdown Structure to Smartsheet Hierarchies
- Add and configure columns for project use
- Apply Conditional Formatting
- Transform the base sheet to a project sheet
- Adjust the Working and Non-Working days of the plan
- Create task relationships
- Adjust the task lag and lead time

Finalizing the Project Plan

- Use formulas to automate sheet activities
- Create Variance columns to track schedule, work, and budget performance
- Build Cell Links between sheets to track and consolidate data
- Display the critical path to examine the plan
- Create a project baseline to track the project progress

Working with Resources

- Assign resources to tasks
- Assign multiple resources to a task
- Enable the Resource Management Tool
- Track resource scheduling conflicts in Resources Management
- Create and Share Resource Views
- Export and deploy custom Resource Views

Tracking Risk/Issue/ Change Request

- Use Smartsheet Forms to collect feedback requests
- Automate notifications to team members
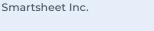- Create reports to manage Change Requests, Issues and Risks

Reporting & Dashboards

- Create reports for tracking project progress:
- Build and deploy a Smartsheet dashboard to communicate key project metrics to the project team and stakeholders