Collaboration Fundamentals

Anna Mkrtchyan
Product Marketing Manager
Smartsheet
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Objectives

Determine the best way to share and collaborate with every stakeholder

1. **Collaborate on a single source of truth**
   - Define permissions
   - Track attachments and conversations

2. **Collect information with forms**
   - Define required fields
   - Intake information from anyone

3. **Keep your teams on track**
   - Alerts and reminders
   - Automated workflows

4. **Track changes and updates in real-time**
   - Cell history
   - Activity log

Anna Mkrtchyan
Product Marketing Manager
Smartsheet
Workflow

Request management

Form

- Intake data from anyone
- Define fields
- Conditional logic
Workflow

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Form

- Intake data from anyone
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Sheet

- Real-time collaboration
- Collaborate on content
- Capture conversations
Workflow

Request management

**Form**
- Intake data from anyone
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**Sheet**
- Real-time collaboration
- Collaborate on content
- Capture conversations

**Automation**
- Alerts and reminders
- Request updates and approvals
- Move completed requests to archive
Workflow

Request management

**Form**
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**Sheet**
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**Automation**
- Alerts and reminders
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- Move completed requests to archive
Additional ways to share

1. **Publish**
   - Create a publicly accessible URL for easy sharing and bookmarking
   - Embed

2. **Send as PDF**
   - Email once or recurring

3. **Dashboards**
   - Custom, real-time view into sheet and report data

4. **Print**
Review

1. Collaborate on a single source of truth
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   - Track attachments and conversations

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   - Alerts and reminders
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4. Track changes and updates in real-time
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Thank you