12BEG - Smartsheet Fundamentals

Top 20 Questions & Answers

1. **Q: Is there an onboarding for new users?**
   A: Yes, free SmartStart onboarding is offered weekly. Register at smartsheet.com/webinars

2. **Q: What is the best way to view tasks assigned to me?**
   A: You can create a filter in a sheet (using your own name, or a Current User filter criteria), or create a report to view tasks across multiple sheets.
   https://help.smartsheet.com/articles/529454-view-your-assigned-tasks

3. **Q: Can you "lock" sheets or dashboards so that no once can make changes? This includes those that may work on the sheets**
   A: Yes, you can share a sheet as Viewer, or you can lock specific columns or rows to prevent changes from anyone that isn't an Admin or Owner. You can also use automation to lock or unlock rows based on actions or dates in the sheet.

4. **Q: Can the symbol columns be automatically changed based on other information in the row?**
   A: Yes, you can use a formula to automatically update symbols or other data in the sheet.
   https://help.smartsheet.com/articles/2480316-available-symbols-in-symbols-column

5. **Q: Is there a file size limit for attachments?**
   A: Yes, 250MB per attachment.
   https://help.smartsheet.com/learning-track/get-started/attachments

6. **Q: Can you save and share filters?**
   A: Yes, filters you create can be saved and even shared with others.
   https://help.smartsheet.com/articles/504659-using-filters-to-show-or-hide-sheet-data

7. **Q: Can you assign more than one person to a task?**
   A: Yes, you can have a multi-assign contact list column

8. **Q: Can I automatically copy the rows in my sheet based on status?**
   A: You can use conditional formatting to color rows based on any criteria (status, assignment, etc.) https://help.smartsheet.com/articles/516359-conditional-formatting

9.   **Q: Can sheet summary data be shown in dashboards?**
A: Yes, you can show sheet summary data in dashboards, reports, and charts in dashboards.

10.   **Q: How do you create metrics in a sheet?**
A: You can add formulas and important metrics to the Sheet Summary, in the right panel. Learn how here

11.   **Q: How do I apply formulas to rows submitted with a form?**
A: Smartsheet will automatically apply formulas to new rows added to a sheet. You can also use column formulas to apply the same formula to all rows in a column.

12.   **Q: How do I back up my work?**
A: You can request one-time or recurring back-ups of your work: https://help.smartsheet.com/learning-track/system-admin/backing-your-data

13.   **Q: Does an admin need to be a licensed user to change columns, rows, etc?**
A:Yes, a license is needed to perform these actions. You can view a chart in this help article - any actions that have an * require a license in addition to Admin permissions https://help.smartsheet.com/articles/1155182-sharing-permission-levels

14.   **Q: Can I incorporate my company logos and branding?**
A: Yes, you can apply branding, including logos and colors: https://help.smartsheet.com/articles/506518-branding-smartsheet-with-your-colors-logo

15.   **Q: If I move a card in Card View, do I need to change the information in the sheet also?**
A: You are working on the same data, regardless of your view. If you make a change in one view, it'll be reflected in the other views.

16.   **Q: Is there a way to connect task dates to each other?**
A: Yes, you can enable dependencies, which allows you to create relationships between rows based on dates. You can learn more here or join us for our upcoming Project Management webinar, open for registration at smartsheet.com/webinars

17.   **Q: Is there an auto-save option?**
A: You can customize your save preferences (inactivity or leaving the sheet) in your Personal Settings.

18.   **Q: How do we format date structure?**
A: You can select the format of date columns:
https://help.smartsheet.com/articles/2479481-apply-standardized-date-formats-in-your-she
et

19.   **Q: How do you create hierarchy/sections in the sheet?**
A: You select the children rows that you want to indent underneath the parent row, and
then use the 'Indent' button found in the toolbar. For more info
https://help.smartsheet.com/articles/504734-hierarchy-indenting-outdenting-rows

20.   **Q: Can I view dates in my sheet on my calendar?**
A: Yes, you can use the integration with Google Calendar or any calendar that works with
iCal.
https://help.smartsheet.com/articles/518535-syncing-your-smartsheet-and-google-calendar
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