

13BEG - Collaboration 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: Do collaborators need to have a Smartsheet license?

A: You can share your Smartsheet work with anyone with an email address, including users who do not have a Smartsheet license. Free collaborators can update your sheets and reports, view dashboards, complete forms, and more. A license is needed if a user would like to own or create Smartsheet items.

3. Q: How can I copy a sheet or share the structure with my team?

A: You can copy a sheet a couple ways:

From the home view, right-click the sheet you want to copy, Save as New

From within the sheet, File > Save as New

You can also create a template if you need to create copies of a sheet on an ongoing basis.

<https://help.smartsheet.com/articles/522123-creating-using-templates>

4. Q: Are automations received by email?

A: Yes, automations are received by email as the default, as well as being visible in the Notification Center. You can customize how you'd like to receive automation, which can include mobile push notifications or alerts to messaging apps.

<https://help.smartsheet.com/articles/2476551-configure-how-smartsheet-notifies-you>

5. Q: Can there be more than 1 person assigned to a task -- will alert/notification be sent to each?

A: Yes, you can assign more than one person to a task when you have a multi-assign contact list column. Automations will be sent to any users assigned in that column.

<https://help.smartsheet.com/articles/518335-assigning-people-to-a-task>

6. Q: Can I ask for content reviews using proofing from someone who is outside my organization?

A: Absolutely! You can share with anyone with an email address - collaborators don't need a Smartsheet license to edit or update your sheet. You can even send proofing requests to

users who don't have access to your sheet - they can comment and approve just on the single item that has been sent through proofing.

7. Q: How to combine multiple approvals?

A: You can create multi-step automated workflows. First, create an approval workflow for your first approver. Then, use the 'if approved' and 'if denied' paths to add additional steps, including additional automated approval requests.

<https://help.smartsheet.com/learning-track/smartsheet-intermediate/approval-requests>

8. Q: How do I track who is making changes in my sheet?

A: You can do this in several ways:

Cell History is available by right clicking on any cell in the sheet.

In the right panel, Activity Log is available for a running list of all changes in a sheet.

Request backups on a recurring basis

9. Q: How do I move a sheet into a workspace?

A: You can simply drag a sheet (or other item) into a workspace, or if creating a new item, save it into the workspace. You will need to have Workspace Admin permissions to add items to a workspace, and will need to be the owner of the item.

<https://help.smartsheet.com/articles/2478911-unable-to-move-item-to-workspace>

10. Q: What Adobe products does the proofing integration work with?

A: The Smartsheet extension for Adobe Creative Cloud is supported with: Photoshop 2019 (v20), 2020 (v21)

Illustrator 2019 (v23), 2020 (v24)

InDesign 2019 (v14), 2020 (v15)

11. Q: What is the difference between using a form or an update request?

A: A form enters new information into a sheet. An update request updates existing rows in a sheet. Therefore, if you're collecting new information, you'll use a form. If you want an update to existing data, you'll use an update request.

12. Q: What kind of files can be reviewed with Proofing?

A: Images, videos, PDFs, and Microsoft Office documents can be reviewed. Learn more here: <https://help.smartsheet.com/learning-track/smartsheet-advanced/proofing>

13. Q: Can you make a form available "publicly", for instance on a web-site?

A: Yes, forms can be shared with anyone or embedded into a website. This is available in the Share Form section:

<https://help.smartsheet.com/learning-track/smartsheet-intermediate/forms>

14. Q: Can I use one form to submit rows to different separate sheets?

A: A form corresponds to just a single sheet, but you can use the move row automation to move rows to other sheets.

<https://help.smartsheet.com/articles/2479626-automatically-move-or-copy-rows-between-sheets>

15. Q: Can notify through Slack?

A: Yes - here is a help article with the messaging apps you can integrate with, including Slack, Microsoft Teams, Google Chat, and Workplace by Facebook:

<https://help.smartsheet.com/learning-track/add-ons/messaging-apps>

16. Q: Is there a way to share with anyone that has a link?

A: Yes, your sheet has a URL. You can share this (which requires sharing with a collaborator) or you can Publish to share your sheet at a URL, just like a website.

This

won't require sign-in.

17. Q: Can I capture who submitted a row using a form?

A: Yes, this can be done in two steps - add a Created By system column to your sheet, and in your Form Options > Security, require that users are signed in when submitting a form.

<https://help.smartsheet.com/articles/2481836-manage-form-display-and-submission-options>

18. Q: How do I hide certain questions on my form?

A: You can include conditional logic when creating your form. This will allow you to show certain fields depending on other responses in the form.

<https://help.smartsheet.com/articles/2481701-use-conditional-logic-to-streamline-form-submissions>

19. Q: Can we create a reminder that a date is coming up, before it is reached?

A: Yes, when creating an automation, you can set your Trigger to be based on a date column in your sheet. You'll see an **On** drop-down that can be changed to # days before or after the date is reached.

20. Q: How do I customize what is included in the automation that is sent?

A: You can customize automation message by choosing to include the row that triggered the automation, the row with specific fields only, or even incorporate the row data into a custom message using brackets. You can [learn more here](#).