Getting Started in Smartsheet!

Use your SIUE e-id to log in at smartsheet.com. You will retain your Smartsheet account throughout your time as a student in the SIUE School of Business.

To start a new project, click the "+ Create new…" tab in the upper left area of the Home tab. From the list of sheet types, select "New *Project* Sheet". At the prompt, name your project. If your new project sheet did not automatically open, open the sheet by using the down arrow next to the name of the sheet. Now you are ready to enter the information from your WBS Worksheet into a Smartsheet project plan:

Entering your project plan

1.   FIRST, fill in just the Task Name column. Enter ALL the Sub-Deliverables, Major Tasks and Sub-Tasks, and the Milestones. Use the Outdent and Indent buttons at left to make tasks subordinate to sub-deliverables, etc.

2.   Now let's consider the settings for the Gantt chart. Click the "Edit Gantt Settings" gear-like icon in the upper left of the Gantt chart area (or, right-click any column header in the spreadsheet area and click "Edit Dependency Settings" – this brings up the same screen). Now consider these settings:

   a) By default, the work week is Monday through Friday. If you want to include Saturdays and/or Sundays as work days in your project schedule, click the "Edit" button under "Working Days" then click the checkboxes for Saturdays and Sundays to add them to the work week.

   b) You can have "labels" print with the bars on the Gantt chart. Click the "Timeline Display" option and left, then look for the "Display label for" drop-down box toward the bottom of that screen. Select what you would like to show to the right of the bars in your Gantt chart (e.g., Task Name, or maybe Assigned To).

3.   NEXT, decide the date you intend for work to start on the project. This is your "project start date". Enter this date in the Start column for the *first lowest-level task*. Then use your cursor to grab the bottom right corner of that date cell and drag it through the Start date column for ALL tasks in the plan. In other words, you are setting the initial Start date for all tasks to the project start date.

4.   THEN, for each of the *lowest-level tasks only*:
   •   If the task has NO predecessors, enter only the Duration. Duration defaults to days (e.g., if you enter 7, that means 7 days).
   •   If the task HAS PREDECESSORS, enter the Duration and Predecessors. There are two ways to enter Predecessors:
      a) You can reference the Smartsheet line numbers at the left of the rows to identify the predecessor tasks, then enter those line numbers in the Predecessors column.
         ▪   For example, if task A is a processor to task B, then you would find the Smartsheet line number at the left of the task A row and enter that line number in the Predecessor column of the task B row.

    b) You can go over to the Gantt chart area and click the bar for the predecessor task, then drag it to the bar of the task it is to precede. (This instruction assumes a finish-to-start task dependency.) You will see that the Predecessor column is then populated with the line number of the predecessor task, as if you had used technique a) above.

      ▪ For example, if task A is a predecessor to task B, you would click task A's bar and drag it to task B's bar.

5.   For a MILESTONE, <u>enter a Duration of 0 (zero) and the milestone date in Start</u>.

6.   Go through the plan and for each of the ***lowest-level tasks only***, enter a team member name in the "Assigned To" column.

7.   FINALLY, let's set the Status column to use a color indicator (red-yellow-green) instead of words. To do this, click the drop-down arrow just below the Status column header, then click Edit Column Properties. Select column type "Symbols" and visual symbol "Red-Yellow-Green Light", then click OK.

Recording progress

When you start executing the tasks in your project plan, team members will use the following columns to report the status of their work:
- **% Complete**: Team member should update this column to reflect their progress on the task.
- **Comment**: Team member should update this column with task information that should be shared with the team, and would also use this column to report an issue or problem encountered.
- **Status**: Team members can use this column to indicate a status classification for each task.

Remember that Smartsheet is cloud-based! So you can access and update your project plan from anywhere, anytime!

Sharing your project plan

While looking at your project plan in Smartsheet, click the Sharing tab along the bottom. Then in the pop-up, click the Share button to enter the email address of the person (or persons) you want to be able to access the project plan. You can specify the level of access you want them to have (Viewer is read only, Editor can update the content, Admin can change the structure of the sheet).

Printing your project plan

While looking at your project plan in Smartsheet, click the Print icon in the left-side tool bar. Then in the pop-up, click the Edit button below "Options" to select the columns you want to appear on the printed report.