

SmartSheet training for regional partnership grantees

A one-stop shop for data collection and reporting

March 2018



PUBLIC HEALTH DIVISION
Office of the State Public Health Director

What we'll cover today

- Using SmartSheet for performance management and evaluation
- Assigning users and permission levels
- SmartSheet walk-through
- Extras
 - Customizing your SmartSheet
 - Printing



But first... introductions

- **Steve Fiala**, Program Design and Evaluation Services. Evaluation lead for public health modernization implementation in 2017-19
- **Julia Hakes**, OHA Office of the State Public Health Director. Technical assistance to SmartSheet users
- **Sara Beaudrault**, OHA Office of the State Public Health Director, Public health modernization coordinator

Using SmartSheet for performance management and evaluation

Performance management

Quarterly work plan updates and expenditures reports

Evaluation

Twice yearly reporting on evaluation questions

Assigning users and permission levels

The screenshot shows the Oregon Health Authority Report Builder interface. At the top, there is a search bar and navigation links for Home, Jackson, Klamath, and Report Builder. A red circle highlights a blue 'Share' button with a person icon in the top right corner of the report preview area. The report preview shows a table with two rows: 'Evaluation' and 'Use of Resources'. The 'Use of Resources' row has a text field with the instruction: 'Please provide any additional information on use of grant funds that you would evaluation:'. The Oregon Health Authority logo is in the bottom right corner.

Assigning users and permission levels

The screenshot shows the 'Report Sharing' dialog box. It has an 'Invite Collaborators' section with a text input field 'Enter names or email addresses...'. Below this is an 'Invite Details' section and a 'Collaborators (3)' section. The collaborators are listed in a table:

Avatar	Name (Email)	Role	Share Icon
CB	Cara Biddlecom (cara.m.biddlecom@state.or.us)	Owner	Share
JM	Jamie Matson (jamie.matson@state.or.us)	Admin	Share
SF	Steven Fiala (steven.c.fiala@state.or.us)	Admin	Share

To the right of the collaborators is a 'Permissions' dropdown menu that is open, showing the following options: 'Editor - can share', 'Admin', 'Editor - can share', 'Editor - cannot share', and 'Viewer'. The Oregon Health Authority logo is in the bottom right corner.

Assigning users and permission levels

- Admin:
 - You!
 - Change the sharing permissions of other collaborators
 - Lock or unlock columns and rows
 - Edit cells in locked columns or rows
 - Set notifications and reminders for others
 - Edit conditional formatting rules

Assigning users and permission levels

- Editor:
 - Edit unlocked rows and columns
 - Insert rows
 - Delete unlocked rows
 - Add new attachments and comments
 - Sort unlocked rows and freeze columns
 - Filter data in sheets, name filters to save them
 - Send Update Requests
 - Share with others if allowed***
 - Move rows within the sheet, or to another sheet

Assigning users and permission levels

- Viewer:
 - View all the sheet data, including comments
 - Export the sheet
 - Send the sheet, or rows through email to themselves or others
 - Download attachments
 - Set own reminders and notifications
 - Sort rows and freeze columns for their own purposes, but can't save these changes
 - Filter data in sheets with the "Unnamed Filter" or apply filters that an Admin (on a Team plan or higher) has created
 - No editing or sharing power

Questions?

Please send questions to PublicHealth.Policy@state.or.us