

Smartsheet Foundations Course Map

Here is a course map with time estimates for each lesson. Time estimates are not inclusive of practice activities. Total course time is approximately 8 hours (5 hours of interactive lessons and 3 hours of practice activities). Course 1 is a short introductory lesson to get acquainted with Smartsheet Foundations.

Course 2: Sheet Basics	6 Lessons Create sheets, insert columns, format cells, set up conditional formatting rules, insert formulas, change views, and create filters.	
Lesson 1: Sheet Basics		10 minutes
Lesson 2: Setting Yourself up to Achieve		20 minutes
Lesson 3: Sheet Formatting		15 minutes
Lesson 4: Formulas		20 minutes
Lesson 5: Filters and Sheet Views		15 minutes
Lesson 6: Cell Linking		10 minutes
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Course 3: Gather Data and Report	3 Lessons Create and distribute forms, add sheet summary fields to your sheet, create reports.	
Lesson 1: Forms		20 minutes
Lesson 2: Sheet Summary		15 minutes
Lesson 3: Reports		15 minutes
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Course 4: Collaboration	3 Lessons Share Smartsheet items and workspaces, attach files to your sheet, have conversations in the context of your work, and upload and review proofs.	
Lesson 1: Sharing and Publishing		20 minutes
Lesson 2: Attachments		10 minutes
Lesson 3: Conversations		10 minutes
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Course 5: Automation	4 Lessons Explain the benefits of automated workflows, and create alerts, reminders, update requests, and approval workflows.	
Lesson 1: Introduction to Automated Workflows		10 minutes
Lesson 2: Update Requests		10 minutes
Lesson 3: Alerts and Reminders		10 minutes
Lesson 4: Approval Workflows		15 minutes
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Course 6: Dashboards	3 Lessons Plan your dashboard, set up metric sheets with cross sheet references, and create a dashboard.	
Lesson 1: Plan Your Dashboard		10 minutes
Lesson 2: Summarize Your Data		20 minutes
Lesson 3: Create Your Dashboard		30 minutes

Smartsheet Foundations Topics Map

Here are the topics and features that are covered in each lesson. You can use this topics map to better plan your Foundations learning journey.

Course 2: Sheet Basics

Lesson 1: Sheet Basics

- Create a Workspace
- Create a Sheet
- Column types

Lesson 2: Setting Yourself up to Achieve

- Home screen
- Navigation bar (Browse, Recents, Favorites, Solution Center)
- Search
- Profile tab and personal settings
- Notification Center

Lesson 3: Sheet Formatting

- Hierarchy
- Toolbar (text wrap, background color, font color, etc.)
- Conditional Formatting

Lesson 4: Formulas

- Cell references (@row)
- Basic mathematical formulas
- IF function and Nested IF functions
- NETWORKDAYS function

Lesson 5: Filters and Sheet Views

- Sheet Filters
- Card View
- Calendar View
- Gantt View

Lesson 6: Cell Linking

- Destination sheet & source sheet
- Cell linking from cell menu
- Cell linking via copy and paste special
- Sheet Reference Manager

Course 3: Gather Data and Report

Lesson 1: Forms

- Create a Form
- Customize a Form (delete fields, add fields, hidden fields, required fields)
- Conditional logic
- Form Settings
- Share & distribute a Form

Lesson 2: Sheet Summary

- Create sheet summary fields
- COUNTIF function

Lesson 3: Reports

- Create a Report (source sheet, columns, filters, grouping, summaries, sorting)
- Create a Report form multiple sheets

Course 4: Collaboration

Lesson 1: Sharing & Publishing

- Share a Workspace
- Share an item from a Workspace
- Share a row or rows
- Publish a Smartsheet item
- Highlight Changes
- Activity Log

Lesson 2: Attachments

- Upload an attachment (row level and sheet level)
- Add a description to an attachment
- Send attachments
- Upload a new version of an attachment

Lesson 3: Conversations

- Add a comment (row level and sheet level)
- Edit a comment
- @ mention someone in a comment
- Draft comments
- Attach a file to a comment

Course 5: Automation

Lesson 1: Introduction to Automated Workflows

- What are automated workflows
- Gauge your readiness for automated workflows
- Test and create automated workflows
- Building blocks of automated workflows

Lesson 2: Update Requests

- Send a row-level update request (manual update request)
- Build an automated and recurring update request
- Automation permissions
- Manage workflows

Lesson 3: Alerts & Reminders

- Create a row level alert or reminder
- Create an automated alert or reminder
- Create a message only alert

Lesson 4: Approval Workflows

- Create an approval workflow
- Customize responses from the approval
- Add approved actions
- Add declined actions

Course 6: Dashboards

Lesson 1: Plan Your Dashboard

- Difference between a dashboard and portal
- Widget types (image, rich text, metric, chart, web content, report, title, shortcuts)

Lesson 2: Summarize Your Data

- COUNTIFS and SUMIFS functions
- Sheet Reference Manager
- Creating a Metric Sheet

Lesson 3: Create Your Dashboard

- Create a Dashboard
- Format widget titles
- Adjust various widget options
- Link data from sheet summaries and metric sheets to your dashboard
- Publish and distribute a dashboard