smartsheet

Filters and sheet views course activity

By the end of this activity, you will be able to:	Follow these steps to get the course activity assets
• Create filters on your sheet • Change your sheet view and update data through different views	1. Go to the Get the Course Activity Assets lesson on the left 2. Click the appropriate link for your region 3. Open the following sheet: 01_Sheet Basics Course Assets > 04_Filters and Sheet Views Activity > 04_Marketing Request Tracker - Filters and Views

Filters

You already have a filter that filters all Sales requests that are in progress or requested. Create these additional filters according to the criteria.

Filter	Conditions
Name: HR Share this filter	Department = HR Status is either In Progress or Requested Include parent rows
Name: Operations Share this filter	Department = Operations Status is either In Progress or Requested Include parent rows
Name: Legal Share this filter	Department = Legal Status is either In Progress or Requested Include parent rows
Name: Marketing Share this filter	Department = Marketing Status is either In Progress or Requested Include parent rows
Name: 50% complete and less than 30 days Share this filter	% Complete is less than 50% or 0.5 Estimated Completion Date is in the next 30 days Include parent rows

Sheet view tasks

View	Tasks

Card View	• Change visible columns on the cards:
	  ○ Hide: Requestor Name, Requestor E-Mail, Department
	  ○ Show: Budget Variance, Status, Estimated Completion Date
	• Change the status of RQID-002 to In Progress
	• Assign RQID-011 to Jose through the card view (drag and drop)

Gantt View	• Make % Complete show up in the gantt bars • Open Gantt view to today's date
Calendar View	• Change the calendar view so you only see the estimated completion date instead of a date range.

Great job! You reached the end of the activity!