smartsheet

Reports course activity

By the end of this activity, you will be able to:	Follow these steps to get the course activity assets
• Create a report • Set report criteria in the report builder • Group and summarize data	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 folder: 02_Gather Data and Report Course Assets > 08_Reports Activity

Create additional reports

In the interactive lesson, you created two reports. In this activity you'll create an additional two reports. Create the reports in the activity folder you downloaded for this activity (click Create > Report) from the browse screen.

Report Name: Sales Requests	
Sheet	Marketing Request Tracker - Reports Activity
Columns	Select: Status, Department, Assigned To Deselect: Sheet Name
Filter	Department > Is one of > Sales Status > is one of > Requested, In Progress
Group	Status > Sort Ascending
Summarize	Status > Count

If you'd like additional practice, you can create reports for the other departments (Legal, Operations, and Marketing) with the same criteria.

Report Name: Past Due Requests	
Sheet	Marketing Request Tracker - Reports Activity
Columns	Select: Urgent, Status, Estimated Completion Date, Department, Assigned To Deselect: Sheet Name
Filter	Estimated Completion Date > is in the past
Group	Assigned To > Sort Ascending Then group by Status > Sort Ascending
Summarize	Status > Count

Send report as attachment

You want to receive the Past Due Requests report in your email every Monday morning. Open the Past Due Requests report you just created and follow these steps.

1. Select the **File** menu
2. Pick **Send as attachment** from the menu
3. Put your email address in the **To** field
4. Customize the **Subject** and **Message**
5. Select the **PDF** radio button
6. Select **Options** next to PDF
7. Under **Scaling**, Select the **Fit to Width** radio button
8. Select OK
9. Select **Schedule** link next to **Delivery**
10. Select **Weekly** radio button
11. Select Monday check box
12. Enter an **end date** of two weeks from today
13. Select OK
14. Select Send

You can send reports and sheets as attachments on a scheduled cadence. This is useful if your leadership wants a report delivered to their inbox every week.

Extra Practice: Multi-Sheet Report

While this example isn't part of the Marketing Request scenario, it's important to highlight multi-sheet reporting Capability. Follow the instructions to create a multi-sheet report.

1. Open the **Site Launch Plans folder**
2. In this folder, create a **new report called Site In Progress Report**
3. Open the report
4. In the Sheets picker, **search and find the Site Launch Plans folder**

5. Select the **checkbox next to the folder**
6. Click **Next**
7. Select these columns: Target Start Date, Target End Date, Start Date, End Date, Status
8. Deselect: Sheet Name
9. Click **Next**
10. Filter the report by this criteria: **Status is one of In Progress**
11. Click **Apply**
12. Group by **Sheet Name and short ascending**
13. Summarize by **Status with Count**

You now have a report that is pulling in information from multiple sheets and every time a new Site Project Plan is created in the selected folder, tasks marked as In Progress will show up in this report.

Great job! You reached the end of the activity!