

Goal

Create trade specific smartsheets to further simplify the process of presenting subcontractors with vital information for coordination.

Steps

- 1) Create master smartsheet containing information for entire project.

FileAutomationForms

FOR MIKE Haemonetics Coordination Log

- 2) The smartsheet should have a section dedicated to the affected trade or area. This naming system should be uniform for each entry. This means use the same word for a trade every time. Do not use multiple names like “ELEC” and “Electrical” or even “elec”.
 - a. Keeping the naming system very uniform will make it much easier to pull the information you want into a report.
- 3) Create new reports for every trade. I suggest keeping these reports in a folder dedicated to your project.
- 4) After creating a new report and opening it, you will be prompted with the “Report Builder”

Report Builder

You need to specify at least one criteria to run the report.

Run **Columns**

Where? Select sheets to be included in your report (required).

Who? Click Who? to report against a contact list column.

What? Click What? to report against a text/number or dropdown list column.

When? Click When? to report against a date column.

and and

- 5) The “Where?” section allows you to choose what sheet(s) you want to pull from. The “Who?” section lets you pull information based on who created the information, this section is optional. The “What?” section is where you choose what column to pull information from. Then you choose what information to pull down from the master sheet.

Report Builder

This report has been modified.
Click Run to refresh the grid.

Run Columns

Where? Who? What?

Restrict to:
1 sheets in scope
☐ FOR MIKE Haemonetics

Click Who? to report against a contact list column.

Click What? to report against a text/number or dropdown list column.

and

Step 1 of 2

Select a column to add to your Report:

Type here to filter list.

- Area
- Item + Description (primary)
- Over Due By (days)
- Overdue
- Party Affected
- Party to Respond
- Priority

Close

In this example, the trades were identified in a column called “Party Affected”.

Report Builder

This report has been modified.
Click Run to refresh the grid.

Run Columns

Where? Who? What? When?

Restrict to:
1 sheets in scope
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Click Who? to report against a contact list column.

Party Affected
<no criteria specified>

and

Step 2 of 2

Select values for Party Affected:

Type here to filter list.

- 7 (1)
- 9 (1)
- Duct (56)
- Electrical (20)
- Fire Protection (51)
- Gilbane (3)

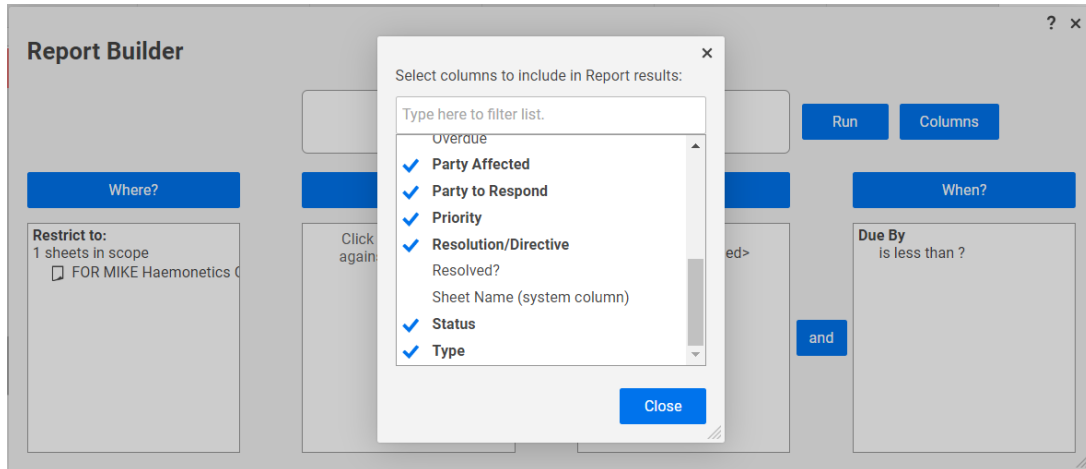
☐ Exclude selected items

Close

The specific trade that this example report is for is ductwork. This report would be published to whatever subcontractor is responsible for all the ductwork.

- 6) The “When?” section can be used to only pull information from a specific time. This would be useful if you wanted to give a subcontractor a report of only the items from the last week. For this example, it is not used, but it could be very useful for presenting trades with time specific information.

- 7) The final step in creating the report is to select what columns you want to include. Just click on the “Columns” button and select what columns you want in the report. The columns are added to the report based on the order that you selected them. So, if you want your report to be the same format as your master sheet, you have to select the columns in the same order.

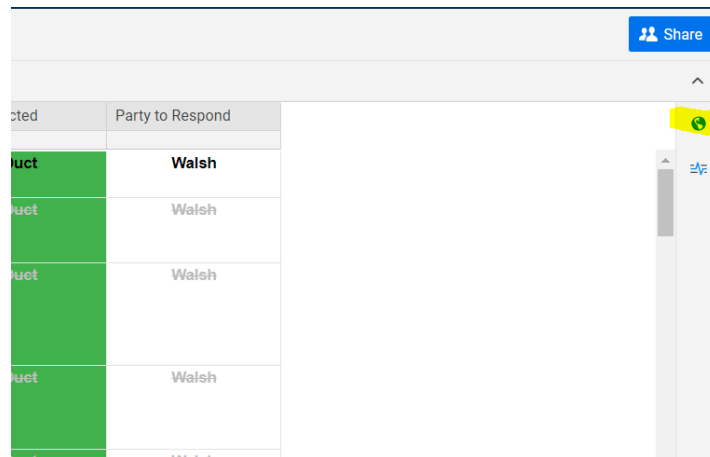


- 8) After all your columns are selected, click “Run”
- 9) This should produce a report of all the rows that pertain to the trade you selected. For this example, a report for all rows containing information on ductwork.

File ☆ Test Report								
		Primary	Type	Status	Resolution/Directive	Priority	Party Affected	Party to Respond
1		Begin submittal process	Request	Ongoing		Major	Duct	Walsh
2		Condition of FPT that are to remain and be reused	Clarification	Resolved		Major	Duct	Walsh
3		WMC_E.7_4_Drop duct below conduit, stay above window soffit	Clash	Resolved	Drop duct below conduit, stay above window soffit	Normal	Duct	Walsh
4		WMC_ALL transfers_submit RFI with cut sheet info	Request	Resolved	RFI-submitted for record	Normal	Duct	Walsh
5		Start dropping in FPT locations per site review on 19th & 18th	Request	Resolved		Normal	Duct	Walsh
6		Start dropping in RGDe into ACT grids	Request	Resolved		Normal	Duct	Walsh
7		L19 Refresh area has some potential ceiling height issues - Currently ceiling @ 8'-6" is into 14"	Clarification	Active	Gilbane to send RFI clarifying ceiling height/duct flattening.	Normal	Duct	Walsh

- a. After a report is created, the easiest way to share it is to publish it. This produces a link so that anyone can view the report, even if they do not have a smartsheet account.

10) To publish a report, click on the globe icon on the right-hand side of the screen



11) Clicking on the globe icon will bring up a pop up, click the slider to produce a link to the report.

12) Copy the link provided, you do not need to change any of the other settings.

A screenshot of a pop-up window titled 'Read Only - Full - Publish Links'. The window has a close button (X) in the top right corner. It contains three sections: 'Publish Link', 'Embed Code', and 'Publish Settings'. The 'Publish Link' section has the text 'Anyone can view this report online at:' followed by a text box containing the URL 'https://app.smartsheet.com/b/publish?EQBCT=25035b6e6b9541ec9f3ca2a909d97dba' and a 'Preview' link. The 'Embed Code' section has the text 'Copy & paste this code to embed this report into any webpage:' followed by a text box containing an iframe code snippet. The 'Publish Settings' section has a 'Default View' dropdown menu set to 'Grid (Gantt)'.

13) This link will allow anyone to view the report and gives them the ability to view and download attachments.