Smartsheet Main Columns

All right. In the previous lesson, we looked at the personal check-in and that was a view that end-users will receive. What we are talking about now is what the administrator will see. And this is really the administrators work bench, and it looks very similar to that personal checking because the personal check-in was created from this.

One of the tips that you might want to do in smart sheet is just freeze your column at this activity level but I just want to show you the big picture first, this sheet is made up of probably 40 or 50 different columns. And what we've done is we've colour coded each section so that we can explain each section, they sit together logically.

And in this demo, we are going to just talk about the main columns, and then we'll break it up in further lessons, into the other column. Basically, in this activity column, you've got a cascade of strategies. Every time you cascade, we use the indent button. You can see as I'm indenting over here it becomes a child of the column above it.

So, we'll come back to that. When we look at templates and what are the kind of default, types of columns we have, the colours are all driven from this activity type and you'll see, there is from vision themes, strategical initiative programs, sub-program, objectives, basically again in the template, we'll explain to you when to use each of these, but as you select these the whole row will change colour.

The lowest level is the white level. And that's the level that we input the data on as normally the key result level. So, you'll see, key result, Q1 to Q4 and then, this would be a cascaded key result, Q1 to Q4. So, the white is really where people input the data, the coloured ones, are all aggregated responsible is the person responsible this is just a Smartsheet again you need to go into Smartsheet training.

It's a contact list. It's got people's emails there. The statuses we've got a defined set of statuses which we explained in the personal check-in and we will change this from time to time. You can change it as administrator to the ones that you want. but this is just a drop-down box. This is the due date.

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Its definition is date and you would select a date from that. The actual and target is just a number you capture the actual target. If you set in a milestone set it as a one, because it's either one or zero but if you've got something like achieve a campaign response of 20%, you can put 20 in they are no units of measure where there's percentages or, values or numbers.

There are no units of measure. You've got to look at the activity name to understand what unit or measure it is this column over here is progress. It's simply that eight divided by the 20, which is 40%. This is an input. That's your next activity? What are you going to do next? This one over here, last activity, you can't change it.

It's pulling from another sheet which we'll discuss in the more advanced modules of this course, but it's really just to look up. So, you can't do anything about that. Last activity rating in some of the situations we look at what was done last week and we simply give it was not achieved or yes, a task was achieved, but it was just a task or final deliverables achieved.

And you can see there's 0 1, 3 rating. And those pickups scores, and we measure the quality of last week's deliverable or last week's action. This column here, the feedback we set in the personal check-in it's just optional, it's just a free format field.

You can put feedback in there. We don't often use weightings, but if you need to weight a key result, you can switch the weighting off in fact, or you can give it a one by default, we use default of one but you can make one KR with five times more, then another one then we've got stretches versus binary so, it is simply saying, is this key result of stretch or binary on OKR alignment we just saying, is this a company-wide key result? Is it a team? In other words, it's not part of the executive chasing for the quarter, as a collective, but you might be in HR or finance and what team and you could team key results, and then you've got personal key results as well the start date we don't often use it for another tracking mechanism. I wouldn't worry about it for this person but if you want it to have a start and end date you would just use that as your start date. So, these are the main columns, and we will move on section by section explaining how each one works.

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