Navigating the Reports Catalog in Smartsheet

This Job Aid will assist your navigation within the Reports Catalog on Smartsheet. Within this document you can learn about:

- Dashboard – Includes several worksheets associated with the Reports Catalog
- Icon Bar – Describes the different icons that appear at the top of the Reports Catalog
- Column Heading – Describes what may be done at a column level (e.g., sort)
- Attachments – Describes how to locate and retrieve attachments for a given Report

Dashboard

Accessing the Reports Catalog Dashboard takes you to a menu of options and different worksheets for helpful information:

- Reports Catalog: Provides a detailed listing of the Reports
- Overview: Provides guidance for using the Reports Catalog
- Topics: Categorizes the reports by subject
- Acronyms: Defines the abbreviations used within the Reports Catalog
- Public Queries: Lists production queries currently available to agencies
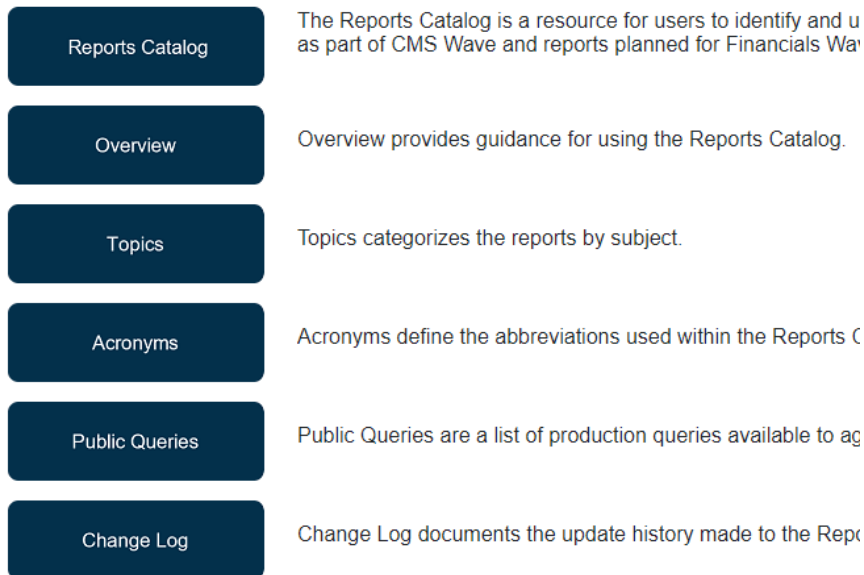- Change Log: Identifies the updates to the Reports Catalog

Figure 1: Reports Catalog Dashboard

Icon Bar

Within the Reports Catalog worksheet, the Icon Bar consists of the following accessible icons:

- Print Icon - Allows the sheet to be printed with a comprehensive list of formatting and output options.
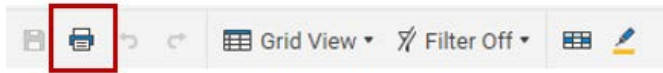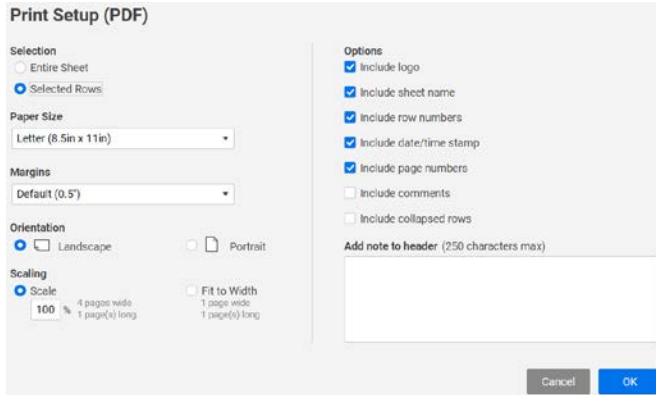
Figure 2: Print Icon

Figure 3: Print Setup Dialog

- Export Icon – Allows the entire sheet to be downloaded to Excel. Access this function by clicking the three dots next to 'Reports Catalog (View Only)'.
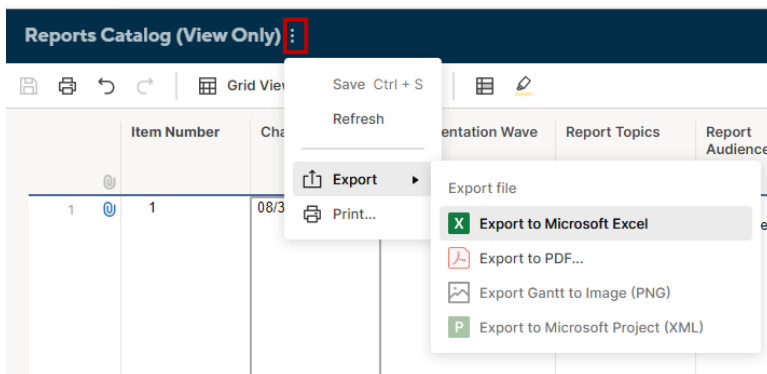

Figure 4: Export to Microsoft Excel

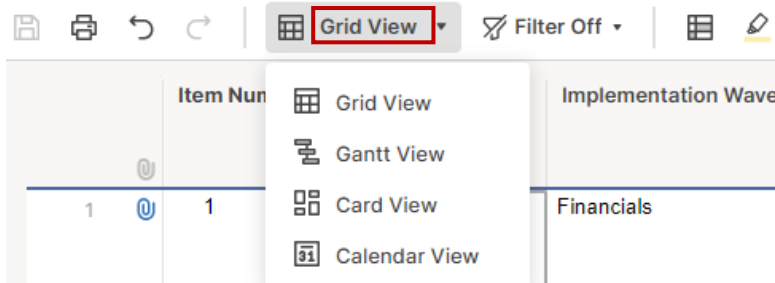- View Icon – Smartsheet sheets can be viewed in the following ways:

Figure 5: View Menu with Options

- Grid View – The default view; data is presented in in columns and rows, similar to Excel.

Figure 6: Example Grid View

- Card View – Displays summary information for each line within the sheet as a series of 'cards' within columns. Clicking the card displays a dialog box with all the fields related to that item.

Figure 7: Example Card View

The Card View can also be combined with filters and different viewing options to assist in finding reports.
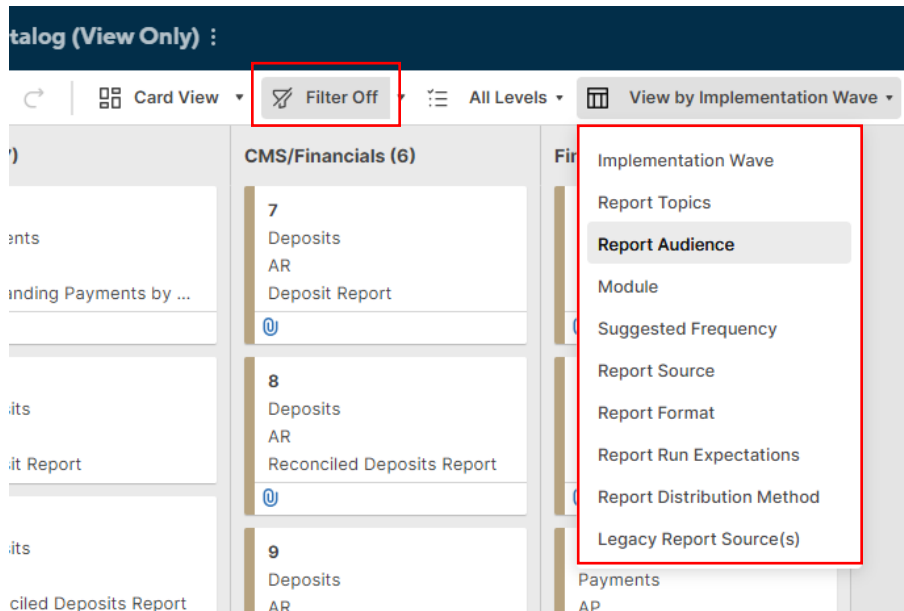
Figure 8: Applying Filters and Viewing Options in Card View

- Filter Icon - Like Excel, sheets can have filters applied to them. Florida PALM has created the following filters that are universally shared:
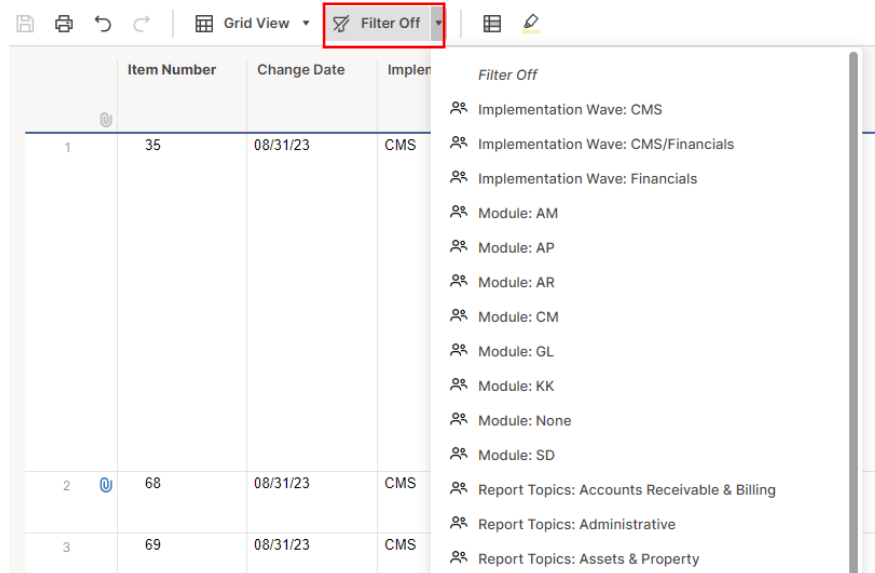

Figure 9: Filter Menu Options

Column Heading

When you hover over a column heading with the mouse three vertical dots appear. Click the 'dots' and the Column Menu appears with the following options.
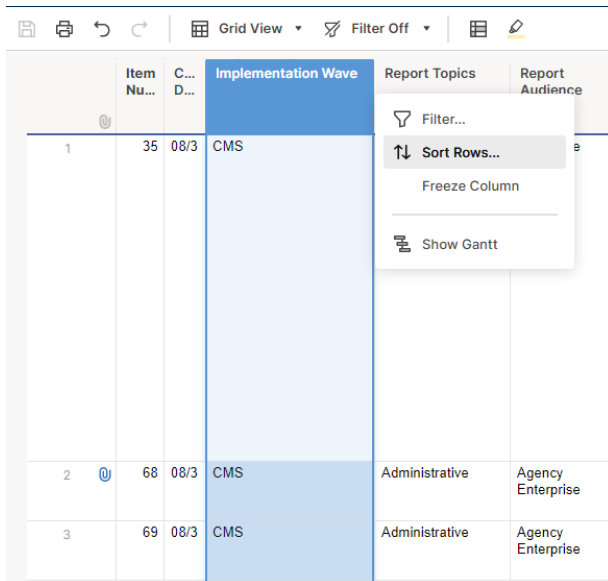
Figure 10: Sheet Column Heading Drop-Down Menu

- Filter – allows creation of a custom filter for data within the column.
- Sort Rows – allows sorting of the data using multiple columns.
- Freeze Column – prevents scrolling of the selected column, and all columns to its left.
- Show Gantt – not applicable

Attachments

Smartsheet allows document attachment per row. On the right side of a sheet, there may be a paperclip icon denoting that one or more attachments are associated a row(s) of data.

Figure 11: Sheet Row Attachment

Clicking the paperclip opens the 'Attachments' window on the right side of the screen, displaying the attachment(s) for the row.
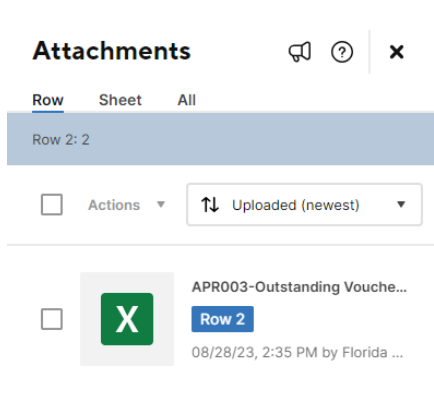
Figure 12: Sheet Attachments Window

Clicking on the attachment file to download to your computer via the browser.

Switching the selection from 'Row' to 'All' allows selection of multiple attachments for simultaneous download via a .zip file. File(s) can also be selected and sent via email using the 'Actions' menu.