smartsheet

Corporate Hub

Template Set Getting Started Guide

With the Corporate Hub template set, you can build a centralized structure for your team's Smartsheet account, provide easy access to relevant materials, and establish a community of support for your Smartsheet users.

smartsheet.com
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Corporate Hub

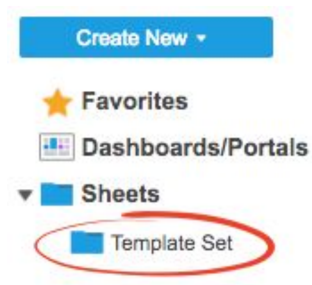
Template Set Getting Started Guide

REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. Click here to see a list of discontinued plans.

Get the Template Set

The data will be download in the *Sheets* folder — look on the left-hand side under Sheets.

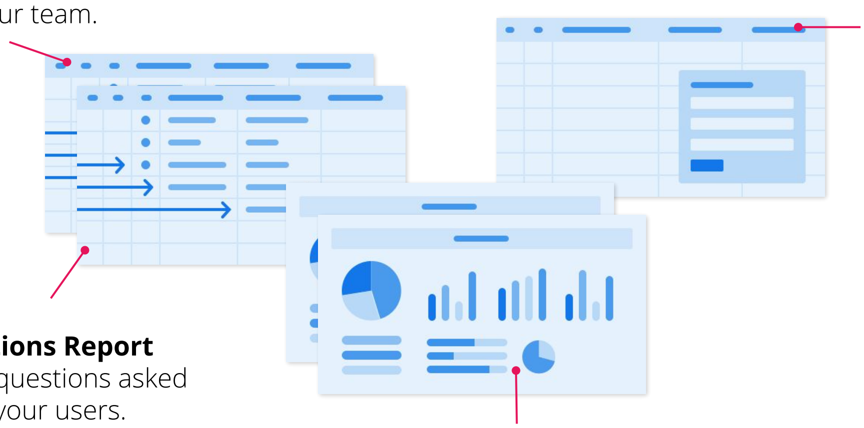
Corporate Hub Template Set



What's Included in the Set

With the Corporate Hub Template Set, you can build a centralized structure for your team's Smartsheet account, provide easy access to relevant materials, and establish a community of support for your Smartsheet users.

New Questions Report
Tracks all open questions submitted by members of your team.



Community Questions Sheet
Collects and maintains questions asked and answers provided by your users.

Community Questions Form
Allows your users to submit questions directly to other users on your team.

Answered Questions Report
Running log of all questions asked and answered by your users.

Corporate Hub Dashboard
Resource hub for your organization, with links to department dashboards and Smartsheet resources.

Department Hub Dashboard
Resource hub for your department, with links to department-specific resources.

Set Up

Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

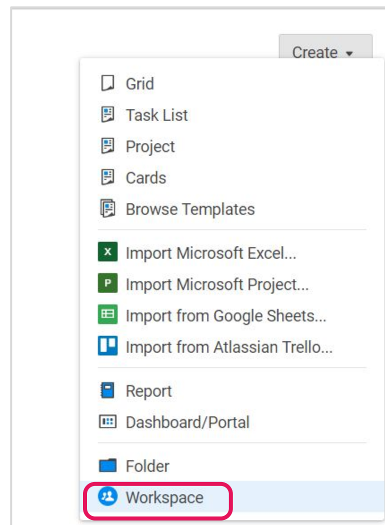
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

Workspaces Overview, Workspace Sharing, Home Tab



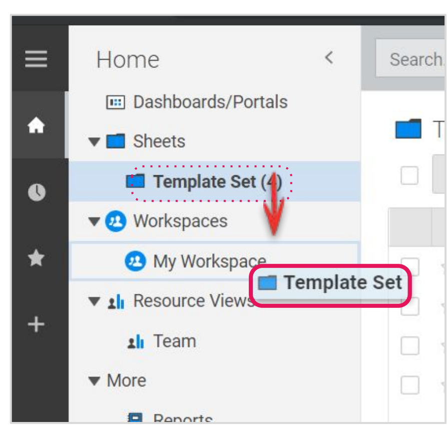
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

Manage Items in a Workspace (Add, Move, Remove)



Corporate Hub

Template Set Getting Started Guide

Customize

Step 3:

Update the Corporate Hub Dashboard

The Corporate Hub dashboard serves as a starting point for members of your account to help them navigate to relevant resources, training, and solution-specific materials they need. Customize any of the below content and resources to best support and train your organization.

A. Click on the “Edit” button in the top left corner to start editing the dashboard.

B. Replace the “Your Logo Goes Here” image with your company logo by hovering over the widget, then selecting the pencil icon to edit.

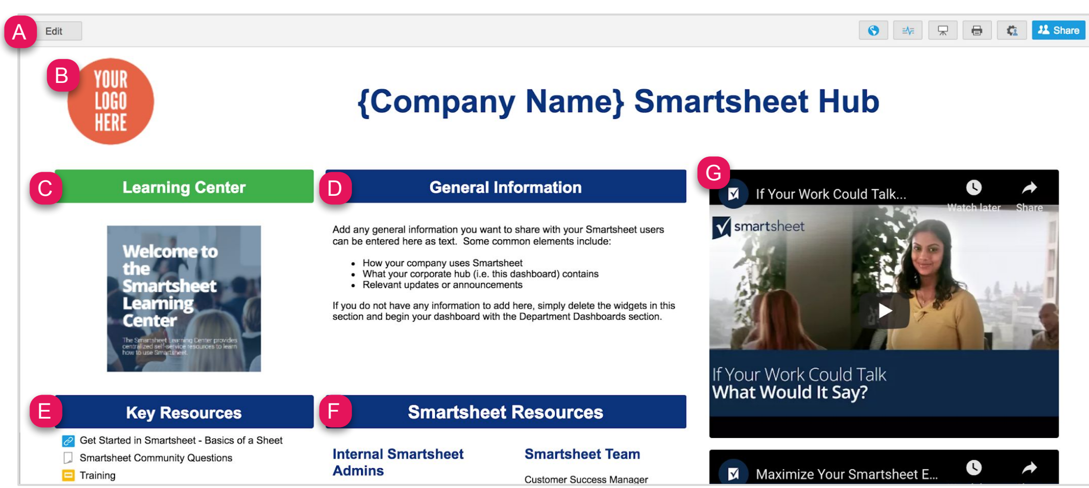
C. The Smartsheet Learning Center is a centralized self-service resource to learn how to use Smartsheet.

D. Provide general information about the use of Smartsheet at your organization, relevant announcements, etc.

E. Edit relevant resources in the Key Resources section by removing the placeholder examples and adding/uploading documents, URLs, or links to Smartsheet items for your whole team.

F. Enter the names and contact information of key contacts that your users can reach out to for support.

G. The Smartsheet videos are additional resources and placeholders you can use to share with your users. Replace the videos with other content by editing the Web Content widget.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

Corporate Hub

Template Set Getting Started Guide

Step 3 (continued):

Update the Corporate Hub Dashboard

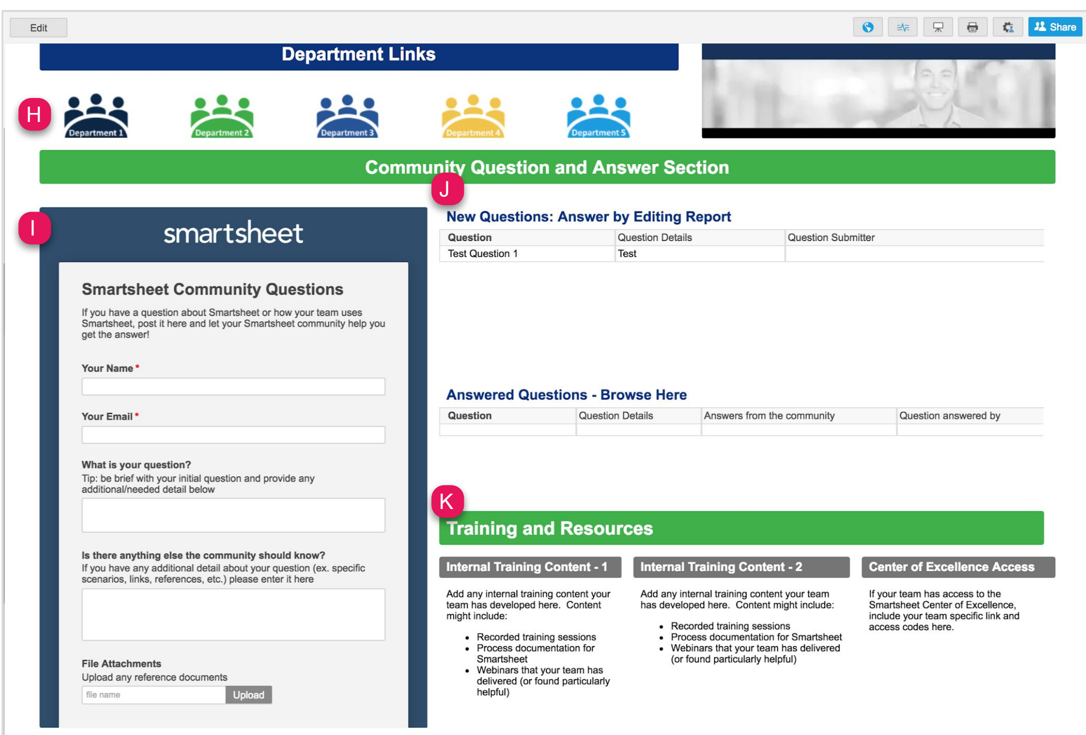
The Corporate Hub dashboard serves as a starting point for members of your account to help them navigate to relevant resources, training, and solution-specific materials they need. Customize any of the below content and resources to best support and train your organization.

H. Replace the placeholder images for each department in the Department Links section to link to each department's dashboard. Click on Insert Image to update the image and Edit Interaction to define the destination.

I. The Smartsheet Community Questions form, embedded using the *Web Content* widget, allows users to submit community questions that can be answered by the community of users.

J. New Questions and Answered Questions are *Report* widgets that display live data in the dashboard.

K. The Training and Resources section gives you the opportunity to display important internal training content that your team has developed, including recorded training sessions, documentation, or webinars.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

Corporate Hub

Template Set Getting Started Guide

Step 4:

Update the Departments Dashboard

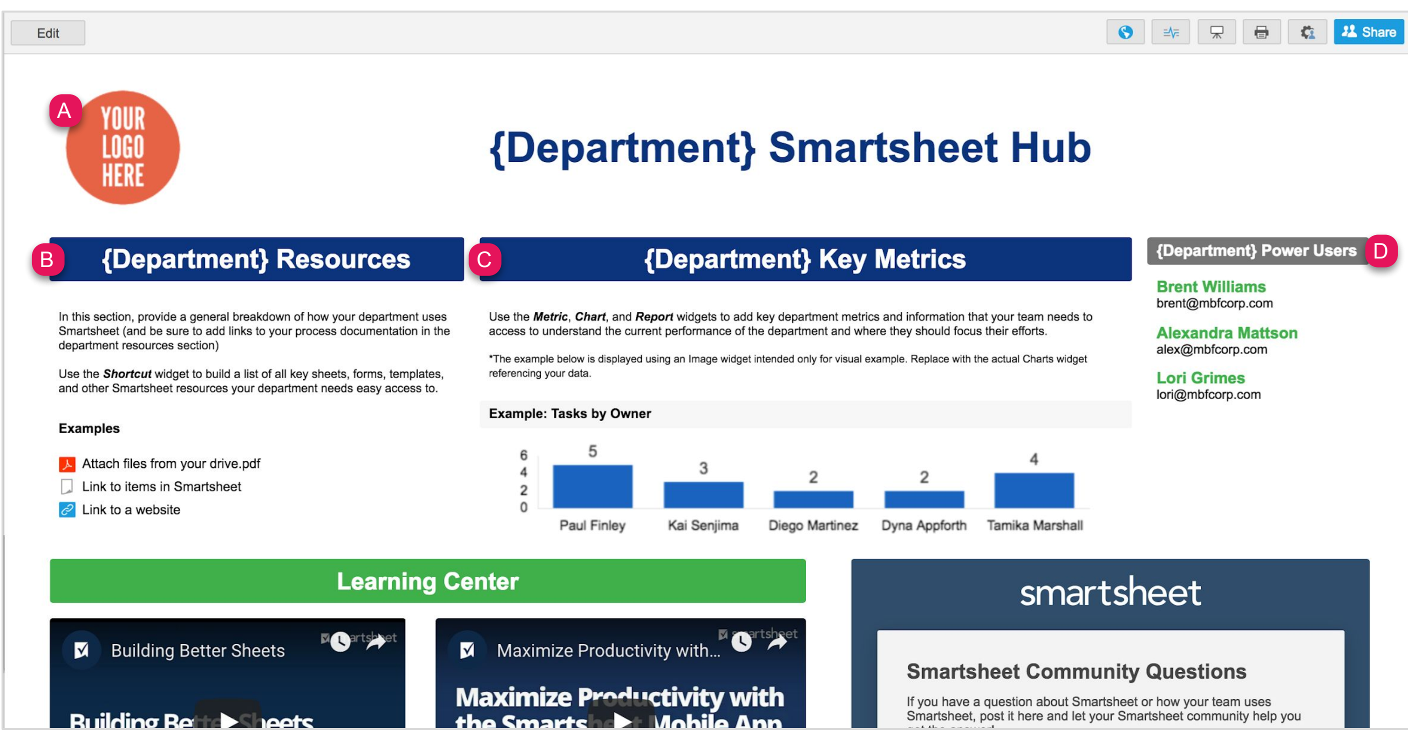
The Department dashboards serves as a place for members of your specific departments to navigate to relevant resources, training, and solution-specific materials they need. Customize any of the below content and resources to best support and train your organization.

A. Replace the "Your Logo Goes Here" image with your company logo by hovering over the widget, then selecting the pencil icon to edit.

B. Edit relevant resources in the Key Resources section by removing the placeholder examples and adding/uploading documents, URLs, or links to Smartsheet items for your team.

C. Add your team's key metrics in the {Department} Key Metrics section. Delete the text and image examples and replace with Metric, Chart, or Report widgets to track progress and status.

D. Enter the names and contact information of your Smartsheet power users that your users can reach out to for help.



Learn more:

Make Changes to an Existing Dashboard, Viewing and Sharing a Dashboard, Widget Types for Smartsheet Dashboards

Corporate Hub

Template Set Getting Started Guide

Step 4 (continued):

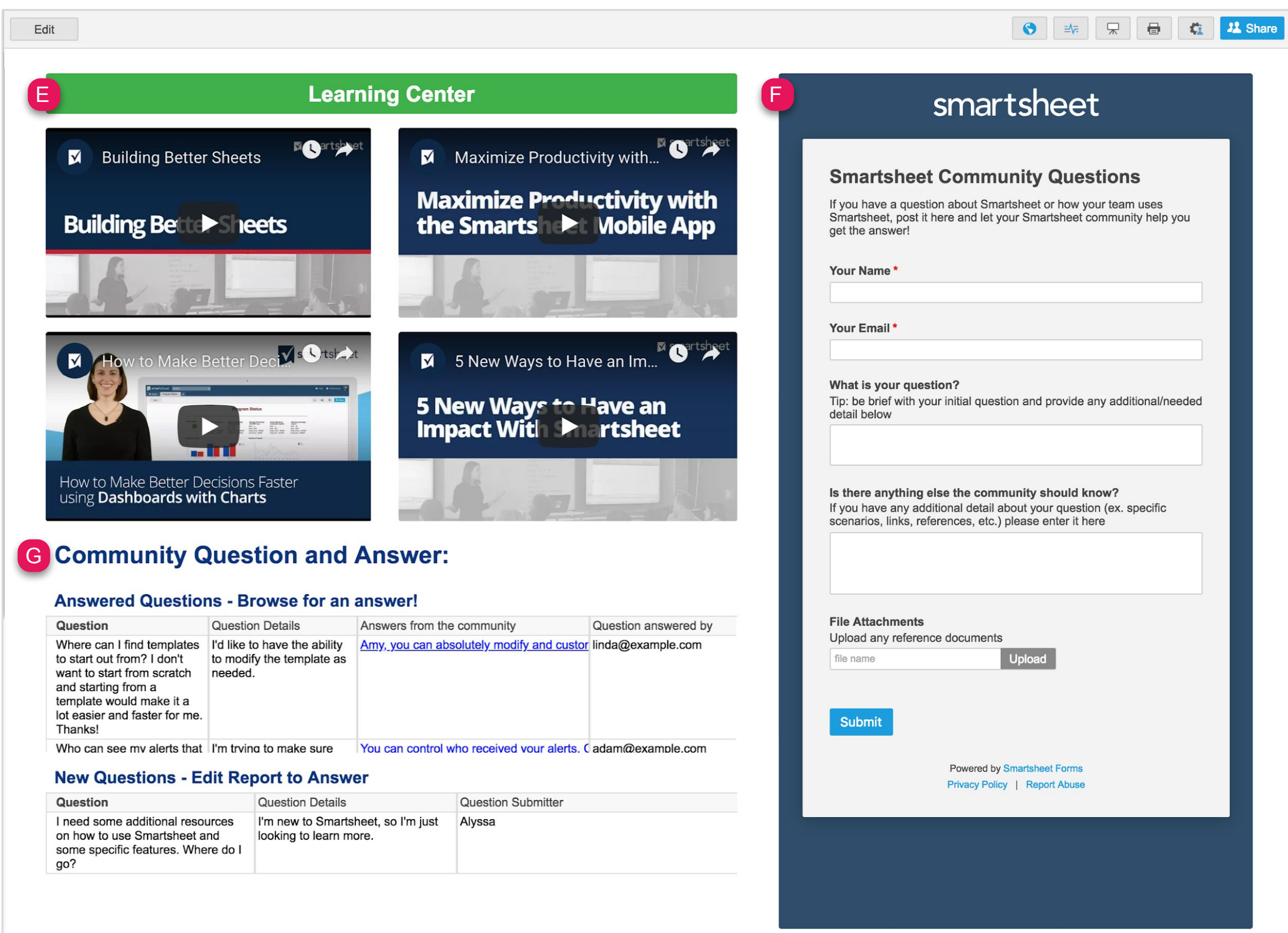
Update the Departments Dashboard

The Department dashboard serves as a place for members of your specific departments to navigate to relevant resources, training, and solution-specific materials they need. Customize any of the below content and resources to best support and train your organization.

E. The Smartsheet videos are additional resources and placeholders you can use to share with your team. Replace the videos with other content by editing the Web Content widget.

F. The Smartsheet Community Questions form, embedded using the *Web Content* widget, allows users to submit community questions that can be answered by the community of users.

G. New Questions and Answered Questions are *Report* widgets that displays live data in the dashboard.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

Corporate Hub

Template Set Getting Started Guide

Step 5:

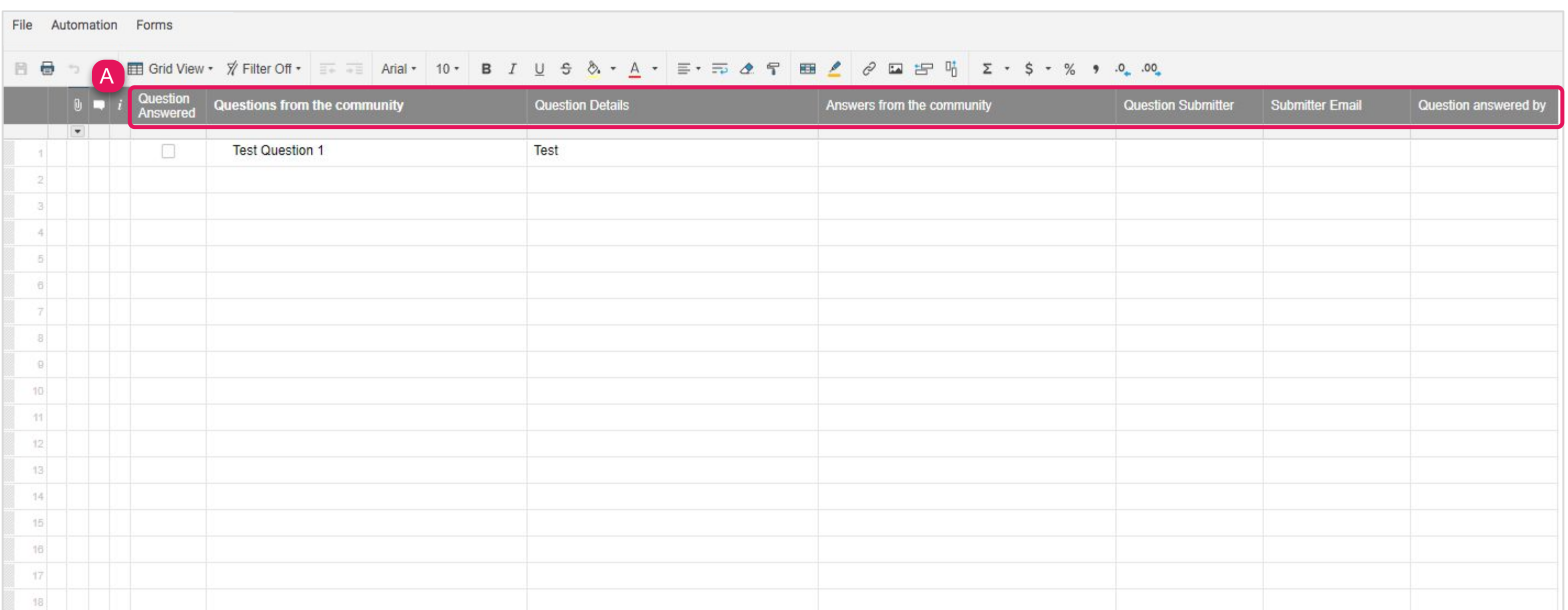
Format the Smartsheet Community Questions Sheet

Use the Smartsheet Community Questions sheet to track and maintain all of your current Smartsheet questions. You can keep record of questions from the community, answers from the community, question submitters, and questions answered by in this sheet.

A. Add or delete any columns to accommodate your team's unique process: right-click on any column and select *Edit column properties* or *Delete*.

B. The Question Answered column is locked to prevent editors from modifying the pre-built formula that auto-checks the checkbox if the question has been answered. The formula references the Answers from the community column and if the column is not blank, then the Question Answered box is checked.
=IF([Answers from the community]2 <> "", 1, 0)

C. An automated workflow has already been set on this sheet to notify the person who submitted the question when their question has been answered. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu. Then double-click on the Question Answered Alert workflow in order to open the editor window.



Learn more:

[Formulas & Functions](), [Locking & Unlocking Columns](), [Insert, Delete, or Rename Columns](), [Save Time and Work Faster With Automated Workflows]()

Step 6:
Sheet Bonus: View or Edit Your Project Summary Data

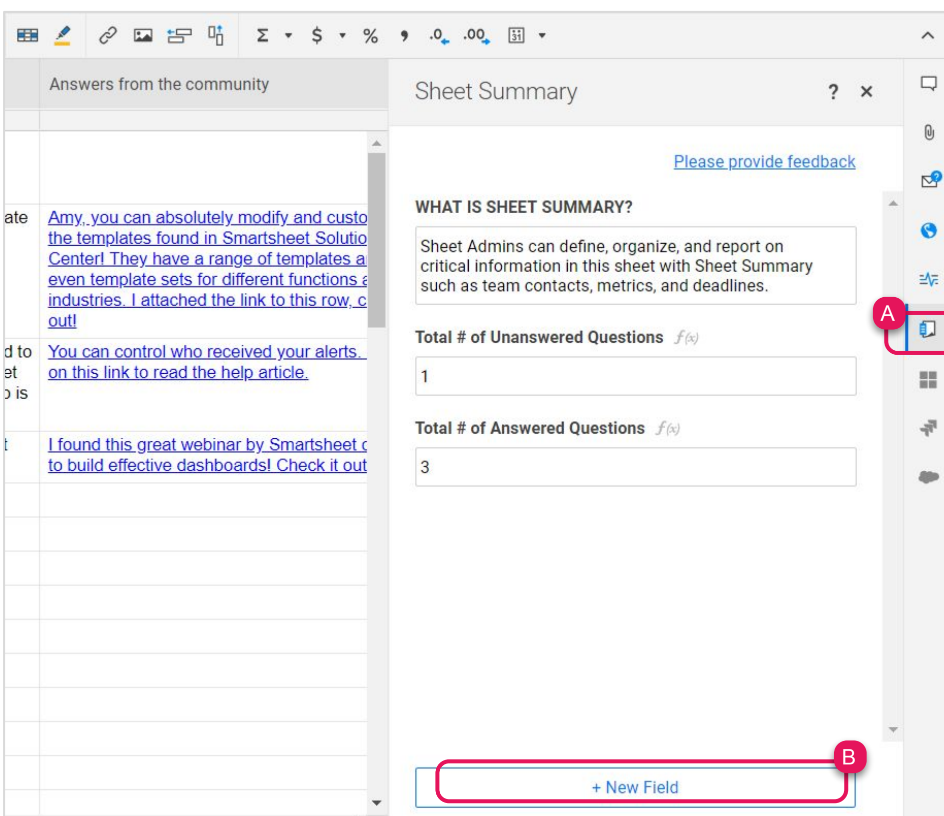
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Smartsheet Community Questions with Form sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the total number of answered and unanswered community questions. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.



Learn more:
[Define Your Work with Sheet Summary](), [Maximize Your Sheet Summary Usage](), [Create a Portfolio View with a Summary Report]()

Corporate Hub

Template Set Getting Started Guide

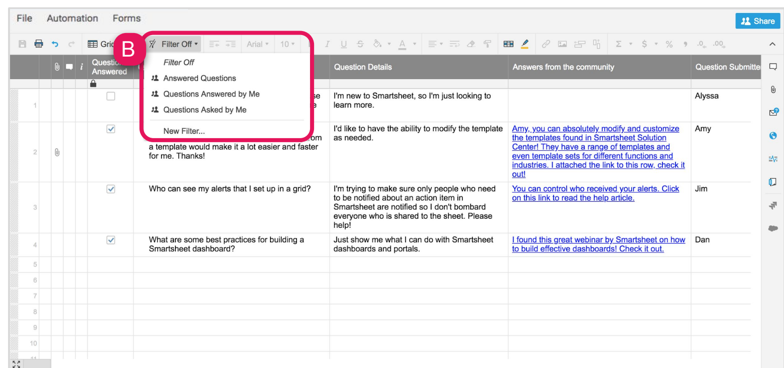
Step 7:

Updating Filters

When you have a lot of questions and answers, filters help people find solutions faster. On the Smartsheet Community Questions sheet, we created a few shared filters called Answered Questions, Questions Answered by Me, and Questions Asked by Me. Anyone viewing the sheet can select any of these filters to only see their assigned items or create their own filters.

A. Select the *Filter Off* button in the toolbar to create, use or modify filters.

B. Check the Share Filter box to share the filter with anyone who has access to the sheet.



Learn more:

[Filters](), [Shared Filter]()

Step 8:

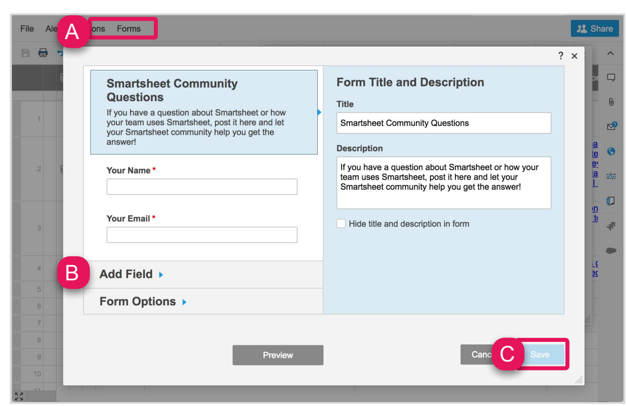
Modify the Smartsheet Community Questions Form

The Smartsheet Community Questions form is how people submit new questions. When questions are submitted via the form they are added to the Smartsheet Community Questions sheet.

A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options.*

B. Click on *Add Field* to add a new field to your form. By creating a new field, you are also adding a new column to the sheet. Drag and drop the field into position on the left-hand side of the form builder.

C. Click *Save* to close the form builder and copy, and save the URL displayed. Give this URL to your users who will be submitting questions. You can also share it via email, hyperlink, or embed it on a website or dashboard.



Learn more:

[Forms](), [Edit Forms Fields]()

Corporate Hub

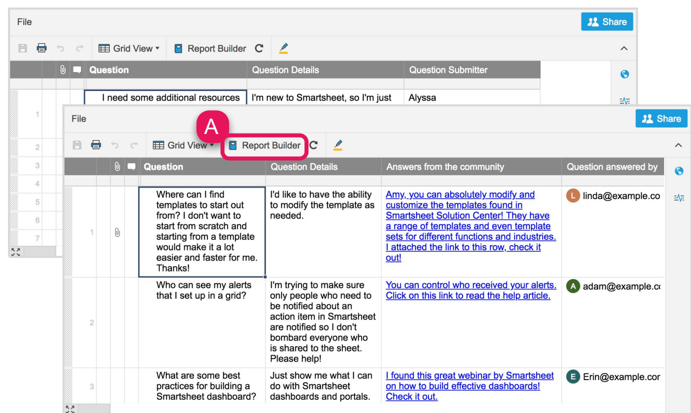
Template Set Getting Started Guide

Step 9:

Open New Questions and Answered Questions Reports

Use reports to create cross-sheet filtered lists of the tasks that meet certain criteria. For instance, the New Questions report shows all items from your Smartsheet Community Questions sheet that currently do not have answers to the question and the Answered Questions report shows all items that do have answers. Reports are live, so as questions are answered, that data will appear on the report. This report is surfaced in the Corporate Hub and Departments dashboards.

A. The report is already set up. If you want to make any changes to the criteria used for the report, open the report and click on *Report Builder* and set your criteria.



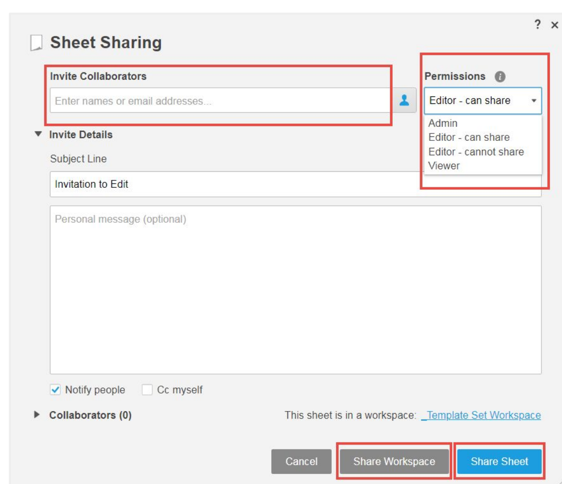
Learn more:

[Reports]

Step 10:

Share Your Corporate Hub Template Set

Sharing is the best way to collaborate with others. You can share your entire workspace with members of your team, or you can simply share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic].



Learn more:

[Workspace Sharing]

FEEDBACK: Let us know what you think of the Corporate Hub Template Set! Share your feedback **[here]**.