

**PTC** PITTSBURGH  
TECHNICAL COLLEGE



## How PTC Utilizes Smartsheet to Manage Compliance

**DOCUMENT AND WORKFLOW MANAGEMENT**



# What is a Smartsheet?

It is software that combines key functionality of Excel, Project, Forms, Power Automate (workflows, and more into one platform.

It includes cloud-based document storage.

The system is designed for collaboration with detailed reporting functionality.

The screenshot displays the Smartsheet web application interface. The browser address bar shows the URL <https://app.smartsheet.com/new>. The page features a dark blue header with the Smartsheet logo and a navigation sidebar on the left. The main content area is titled "Browse All Solutions" and includes a search bar and a list of categories: Recently Added, Clients & Customers, Finance & Accounting, General Management, Human Resources, IT, Marketing, Product Development, Projects, Sales, and More. Below this, there are three featured "Template Set" cards: "Project Management Office", "Employee Pulse Check", and "Marketing Budget Management". A "Templates" section follows, with the subtext "Jump-start your work with pre-built sheets you can modify" and three template cards: "2 in 1 Event Work Back and RACI", "Accounts Payable with Autom...", and "Agile Project with Gantt". A "See More Templates" link is provided below the templates. The "Template Sets" section is partially visible at the bottom.



# Why does PTC use Smartsheet?

## **VERSATILITY**

- At present, PTC uses it to track state authorization compliance, policies, grant projects, data security (NIST), licensing and certifications, accreditation, and other regulatory compliance.

## **COLLABORATION**

- For policy management, PTC sends out surveys to leadership so they can set the review schedule and frequency, assign the review team and approval contacts, link policies to associated procedures, note regulatory associations, and other data to automate the process.

## **EASE OF USE**

- The software's workflow system is very easy to navigate and to automate. The support videos and webpages are incredibly helpful.



# CREATING A SMARTSHEET

- Smartsheet uses a hierarchy organizational system
- They are built around a “primary column.”
- It's the column with expand and collapse buttons to reveal subcategories and content within your sheet.

	Quick Status	Program and Reporting Details	CIP CODE	Date Submitted/D...	Resi App
34	●	<a href="#">Nonprofit Conversion</a>			
35	●	PA Department of Education			
72	●	Middle States Commission on Higher Education			
73	●	Notifications			
80	●	Credit Hour			
82	●	Annual Institution Update (AIU)			
91	●	Self-Study, Periodic Review, and Follow-up Reports			
92	●	2002 - PTI Initial Accreditation			
107	●	2006 - Self-Study			
111	●	2012 - PRR			
117	●	2017 - Self-Study			
118	●	2017-MSCHE Final Determination		04/19/17	06
119	●	2017-Team Evaluation Report		03/15/17	04
120	●	2017-Final Self-Study Documents		04/25/15	01
121	●	2016-Federal Compliance Report		11/29/16	01
122	●	2017-Team Visit Notification & Member List		12/19/16	12
123	●	2015-MSCHE-Self-Study Design Feedback		03/27/15	04
124	●	2015-MSCHE-Draft Self-Study Design		10/27/14	03
125	●	2014-MSCHE-Accreditation Review Planning		05/27/14	10
126	●	Substantive Change			
153	●	State Authorization			

COUNT: 5 MIN: 04/25/15 MAX: 01/26/17

Attachments: Row 120: 2017-Final Self-Study Documents

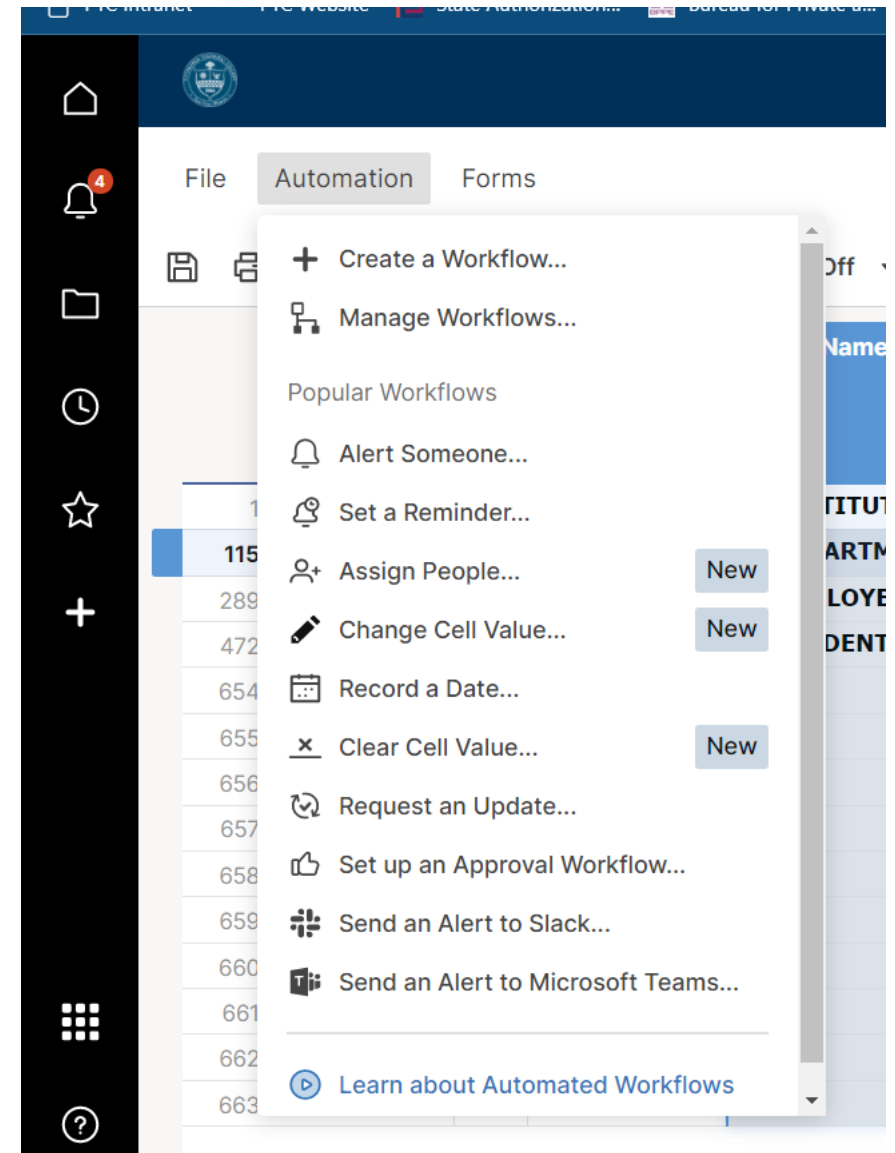
- Exhibit 88 - SLO Process Chart... Row 120 (January 26, 2017, 5:21 PM by Melissa...)
- Exhibit 89 - Graphic Design Co... Row 120 (January 26, 2017, 5:21 PM by Melissa...)
- Exhibit 87 - Program Outcomes ... Row 120 (January 26, 2017, 5:21 PM by Melissa...)
- Exhibit 85 - Principles of Writin... Row 120 (January 26, 2017, 5:21 PM by Melissa...)
- Exhibit 86 - Interview Book Broc... (Attach Files to Row 120)



## • Workflows

Workflows can be set up in Smartsheet to automate some or most of the review process.

- Automated Reminders
- Assign contacts
- Assign Editor(s)
- Create review schedule
- Track changes (shared documents)
- Approval Workflows
- Notifications
- Automatic alerts to Teams.





# Workflow Options - Manual

The screenshot displays a web browser window with the URL <https://app.smartsheet.com/sheets/8qvPx8MR683CX2Fqc6QVpgQvf6qXVg3q3GJfcwv1?view=grid>. The browser tabs include 'PTC POLICY MANAGEMENT - Sm...', 'PTC Institutional and Program C...', and 'New tab'. The browser's address bar and bookmarks bar are visible. The main content area shows the 'Manage Workflows' interface for 'PTC POLICY MANAGEMENT'. A modal window titled 'Untitled Workflow' is open, showing the following configuration:

- Trigger:** When rows are added or changed
- When:** Any field changes
- Run workflow:** When triggered
- Action Selection:**
  - Notifications**
  - Alert someone**: Alert people about rows on your sheet
  - Alert a Microsoft Teams channel**: Send an alert to one of your Microsoft Teams channels
  - Alert a Slack channel**: Send an alert to one of your Slack channels

At the bottom of the modal window, there are 'Cancel' and 'Save' buttons.



# Workflow Options - Template

PTC POLICY MANAGEMENT - Sn x PTC Institutional and Program C x New tab

https://app.smartsheet.com/sheets/8qvPx8MR683CX2Fqc6QVpgQvf6qXVg3q3GJfcw1?view=grid

PTC Intranet PTC Website State Authorization... Bureau for Private a... SAN Federal Regulations SAN Why Comply? SAN SAN and UPCEA W... Bookmarks bar PA CareerLink - WE... Pennsylvania Infor... Other favorites

← PTC POLICY MANAGEMENT / Workflow Template Gallery

Manage Workflows + Create from scratch

## Create a workflow from a template

Pick a workflow template that you can modify as needed.

Search templates

### Popular Templates

- Alert someone when specified criteria are met
- Remind someone on a specific date
- Request an update every week
- Move a row to another sheet when specified criteria are met

### Notifications and Reminders

- Alert someone when specified criteria are met
- Send a message-only alert when specified criteria are met
- Remind someone on a specific date
- Alert a Slack channel when specified criteria are met



# • Smartsheet Surveys

- For policies at PTC, the repository is SharePoint
- Each policy is viewable by PTC members with limited editing permissions.
- Policies are linked to in Smartsheet, which adds the link to an automated survey sent out at user scheduled intervals for contacts to update policy information.

Update Request: PTC POLICY MANAGEMENT

Melissa Brown via Smartsheet <user@app.smartsheet.com>  
To: Brown, Melissa

Expires: 6/6/2027

Retention Policy: Default PTC 5 Year Compliance (5 years)

This is the most recent version, but you made changes to another copy. Click here to see the other versions.  
You forwarded this message on 6/7/2022 3:44 PM.  
If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Thank you!

Instructions: [https://pti0.sharepoint.com/b/s/InstitutionPolicyandProcedures/ETCkKldg9xhDkQxFzUo\\_eegBaYVBXsqScMwUroVg5wXIQa?e=NYQNT4](https://pti0.sharepoint.com/b/s/InstitutionPolicyandProcedures/ETCkKldg9xhDkQxFzUo_eegBaYVBXsqScMwUroVg5wXIQa?e=NYQNT4)

Open Update Form

Modified	Name	Policy Number	Contact Person	Department	Policy Objective	Policy Editor	Reviewer(s)/Stakeholder(s)	Review Frequency	Schedule Next Review Date	Links to associated procedures	Regulatory Oversight (YES/NO)	Link to Regulatory Citation(s)
06/07/22	<a href="#">SP - Drop Add Period.docx</a>	SP - AA - 001	Bycura, Samantha	Academic Affairs	To inform students of the process to drop/add courses during the first seven days of each quarter.							
06/07/22	<a href="#">SP - Confidentiality of Student Records.docx</a>	SP - AA - 003	Bycura, Samantha	Academic Affairs	To inform students of their rights under the Family Education Rights and Privacy Act of 1974. (FERPA).							





- # Survey Request

The screenshot shows a web browser window with multiple tabs. The active tab is titled "Update Request" and displays a Smartsheet form. The form title is "Update Request: PTC POLICY MANAGEMENT". The content of the form includes a greeting, instructions, a thank you message, and a list of fields: "Modified" (06/07/2022), "Name" (SP - Drop Add Period.docx), and "Policy Number" (SP - AA - 001). At the bottom of the form, there are "Previous" and "Next" navigation buttons, with "1 of 16" indicating the current page.

PTC POLICY MAN x PTC Institutional x New tab x smartsheet prima x smartsheet prima x Work With the Pri x https://pti0.share x Update Request x

https://app.smartsheet.com/b/updaterequest?ux=xCPQQs3VtPgcASJwVbteW2uqpxzSZ3qkZcS2SgO82vc

PTC Intranet PTC Website State Authorization... Bureau for Private a... SAN Federal Regulations SAN Why Comply? SAN SAN and UPCEA W... Bookmarks bar PA CareerLink - WE... Pennsylvania Infor... Other favorites

## Update Request: PTC POLICY MANAGEMENT

Hi Samantha.

Please complete the policy surveys linked to below. Let me know if you have any questions as you go through the process. Instructions are linked below.

All feedback is welcome! We're trying to make this as simple as possible, so any suggestions you have could be incredibly helpful.

Thank you!

Instructions:  
<https://pti0.sharepoint.com/:b:/s/InstitutionPolicyandProcedures/ETCkKldg9xhDkQxFzLe=NYQNT4>

**Modified**

06/07/2022

**Name**

SP - Drop Add Period.docx

**Policy Number**

SP - AA - 001

Previous 1 of 16 Next



# • Smartsheet Track Changes

- After a user completes a survey, an automated notice of tracked changes is sent to the sheet owner that highlights all changes made.

Update Confirmation: PTC POLICY MANAGEMENT - Message (HTML)

File Message Help Acrobat

Ignore Delete Archive Reply Reply Forward Share to Teams Newsletters Team Email Reply & Delete To Manager Done Create New Move Assign Policy Mark Unread Categorize Follow Up Editing Read Aloud Immersive Reader Translate Zoom Viva Insights Report Message

Update Confirmation: PTC POLICY MANAGEMENT

From: pierce.kristy@ptcollege.edu via Smartsheet <user@app.smartsheet.com>  
To: Brown, Melissa

Retention Policy: Default PTC 5 Year Compliance (5 years) Expires: 6/9/2027

Update Confirmation: PTC POLICY MANAGEMENT

Modified	Name	Policy Number	Contact Person	Department	Policy Objective	Policy Editor	Reviewer(s)/Stakeholder(s)	Review Frequency	Schedule Next Review Date	Links to associated procedures	Regulatory Oversight (YES/NO)	Link to Regulatory Citation(s)
06/06/22	<a href="#">SP - ST Classroom Attendance Policy.docx</a>	SP - AA - ST - 001	Pierce, Kristy	Academic Affairs, Surgical Technology	To notify students of program attendance expectations.	Kristy Pierce	<a href="mailto:pierce.kristy@ptcollege.edu">pierce.kristy@ptcollege.edu</a>	Annually	05/01/23			
06/06/22	<a href="#">SP - ST Clinical or Internship Attendance Policy.docx</a>	SP - AA - ST - 002	Pierce, Kristy	Academic Affairs, Surgical Technology	To inform students of attendance expectations when participating in clinicals or internships.	Kristy Pierce	<a href="mailto:pierce.kristy@ptcollege.edu">pierce.kristy@ptcollege.edu</a>	Annually	05/01/23			
06/06/22	<a href="#">SP - ST Behavioral Standards Policy.docx</a>	SP - AA - ST - 003	Pierce, Kristy	Academic Affairs, Surgical Technology	To notify students of behavior expectations while participating in education programs and activities.	Kristy Pierce	<a href="mailto:pierce.kristy@ptcollege.edu">pierce.kristy@ptcollege.edu</a>	Annually	05/01/23			
06/06/22	<a href="#">SP - ST Classroom Behavior Policy.docx</a>	SP - AA - ST - 004	Pierce, Kristy	Academic Affairs, Surgical Technology	To inform students of the behavior expectations	Kristy Pierce	<a href="mailto:pierce.kristy@ptcollege.edu">pierce.kristy@ptcollege.edu</a>	Annually	05/01/23			



# Smartsheet Layouts

- Card View makes it easy to organize entries by a designated category or action, etc. .

The screenshot shows the Smartsheet interface in Card View. The sheet is titled "State Authorization Rules by State". The view is organized into columns representing different states and categories. Each card displays the state abbreviation, the organization name, and the contact person's name and title.

Category	State	Contact
YES (17)	AK	Alaska Commission on Post... Tyler Eggen Institutional Authorization P...
	AL	Alabama Commission on Hi... Ron Leonard Director of Special Initiatives
	AR	Arkansas Department of Hi... Alana Boles Program Director for Privat...
	AZ	Arizona SARA Council Lanna Dueck Ex. Director
NO (8)	NC	North Carolina State Educat... Terrence R. Scarborough, ... Director of SARA North Car...
	NE	Nebraska Coordinating Co... Kathleen L. Fimple, PhD Academic Programs Officer
Letter of Inquiry Reques... (1)	KY	Kentucky Council on Postse... Sarah Levy Ex. Director, PS Licensing
	MS	Mississippi Institutions of Hi... Menia Dykes Director of Accreditation
YES- w/ internship (mor... (1)	CO	Colorado Department of Hi... Heather DeLange Director - Office of Private ...
	MO	Missouri Department of Hig... Leroy Wade Deputy Commissioner
YES - w/ internship (on... (2)	OH	Ohio Department of Higher ... Matt Exline Assistant Director of Progra...
	OK	



# • Automatic Notifications

- The approval process is similar to the survey process.
- Once approved a document can then be set up to automatically post to Teams

Search

All teams

PTC POLICIES

General

Activity

Chat

Teams

Assignments

Calendar

Calls

Files

Shifts

Apps

Help

General Posts Files Staff Notebook +

Meet

Reply

Brown, Melissa 11/15/2021 3:47 PM Edited  
Policy Numbers are created by using the following: Category Code; hyphen, Department/Office of Origin Code; hyphen, TEAMS File Code. Example is "IP-PS- 001." Based on this code, we can see that it's an Institutional Policy (applicable to everyone at PTC) developed by the Public Safety Department. For reference, a list of Department Codes is pinned to the top of the "Files" tab on the PTC POLICIES TEAM site.

Reply

Wednesday, March 23, 2022

Smartsheet 3/23 9:44 AM

Melissa Brown made changes to a sheet:  
[PTC POLICY MANAGEMENT](#)

TEST

Policy Name  
Cancellation Policy

Policy Number  
SP - SA -002

Reply

Thursday, May 19, 2022

Brown, Melissa 5/19 11:29 AM

Military Students - Active Duty Policy

Bycura, Samantha <Bycura.Samantha@ptcollege.edu>  
To Senior Leadership  
Thu, May 19, 2022 11:07 AM

New conversation



# Data Security

- At PTC, we do not use Smartsheet for documents containing pii as the “Business” level does not meet FERPA requirements.
  - The “Enterprise” level does – it also includes single sign-on.
- While the lack of single sign-on isn’t ideal, users who take the surveys do not need to create their own Smartsheet accounts.
  - Smartsheet surveys are open to all users designated by the sheet owner.



# Sharing Smartsheet Data

Home - Smartsheet.com | Create New - Smartsheet.com | PTC POLICY MANAGEMENT - Sm | New tab

https://app.smartsheet.com/sheets/8qvPx8MR683CX2Fqc6QVpgQvf6qXVg3q3GJfcw1?view=grid

PTC Intranet | PTC Website | State Authorization... | Bureau for Private a... | SAN Federal Regulations | SAN Why Comply? | SAN SAN and UPCEA W... | Bookmarks bar | PA CareerLink - WE... | Pennsylvania Infor... | Other favorites

Search...

File Automation Forms

Grid View

Share

### Sheet Sharing

Invite Collaborators

Add people and workgroups

Permissions

- Editor - can share
- Admin
- Editor - can share
- Editor - cannot share
- Commenter
- Viewer

Invite Details

Subject

Melissa Brown invited you to edit the PTC POLICY MANAGEMENT sheet

Add a helpful message

Notify people  Cc myself

Collaborators (0)

Cancel Share Sheet

Modified	Name
	POLICY I
06/07/22	SP - Drop
06/07/22	SP - Con
06/07/22	SP - Atter
06/07/22	SP - Stuc
06/07/22	SP - Satis
06/07/22	SP - Stuc
06/07/22	SP - Grad
06/07/22	SP - Grad
06/07/22	SP - Grad
06/07/22	SP - Acad
06/07/22	SP - Text
06/07/22	SP - Acad
06/07/22	SP - Tuto
06/07/22	SP - Posthumous Degree Policy.docx
	SP - AA - 015
	Academic Affairs
	To inform students of PTC's policy on awarding a posthumous deg
	To inform students of the federal definition of a credit hour. A credit measuring educational credit, usually based on the number of clas

Active

Students of the process to drop/add courses during the f

Students of their rights under the Family Education Right (FERPA).

Attendance procedures for pregnant students or student:

Students about surveys that PTC will distribute to collect (experience. PTC utilizes this information to continuously improve its activities.

Students of the institution's academic expectations and criteria applicable to those who need assistance.

Students of the various awards and honors that PTC offers and applicable requirements.

Students of PTC's graduation requirements.

Students of how to obtain their grade transcripts.

Students as to how the college calculates grades and grading.

Students of supply and textbook purchasing options as well as to make an informed decision.

Students of where to obtain text books and supplies.

Students of how to update information in their academic records.

Students of tutoring opportunities available to them on campus.



# Smartsheet Quick Collaboration

State Authorization Rules by State

https://app.smartsheet.com/sheets/6whXFgR3x2h8Pp6pR4Cj9P5Rw25cqJM3R66RVcp1?view=grid

Search...

Share

Filter | Arial | 12 | B I U | [Color Picker] | [Text Color] | [Background Color] | [Link] | [Image] | [Table] | [Grid] | [Print] | [Export] | [Refresh] | [Undo] | [Redo] | [Zoom In] | [Zoom Out] | [Full Screen] | [Help]

	State Auth Response Received	Is application required?	Summary of App Process	Physical Presence (online only or w/ internship)	Date Appl Sent
in on	YES - Attached to Row	YES	<a href="https://acpe.alaska.gov/Institution">https://acpe.alaska.gov/Institution</a>	TBD	
ision on	YES - Phone Discussion	YES	<a href="https://www.accs.edu/about-accs/">https://www.accs.edu/about-accs/</a>	TBD	
ient in	YES - Attached to Row	YES	<a href="https://www.adhe.edu/institutions/">https://www.adhe.edu/institutions/</a>	TBD	
uncil	YES - Attached to Row	YES	Letter of intent attached. Must complete and submit to Arizona State Board for Private Postsecondary Education	YES	
ent of	YES - Attached to Row	YES- w/ internship (more than 10)	100% online and less than 10 internships are ok. Colleges must pay for workers compensation coverage for CO internships. Information attached.	Internship, less than 10 Ok	
of	YES - Attached to Row	YES		YES	
	YES - Attached to Row	YES	<a href="https://helc.osse.dc.gov/HELCAAd">https://helc.osse.dc.gov/HELCAAd</a>	YES	
ent	YES - Phone Discussion	YES	Must submit one page inquiry (attached).	YES	

COUNT: 9

Attachments

Row Sheet All

Row 1: AK

Actions Sort by Date

AK State Authorization Email.pdf

Row 1

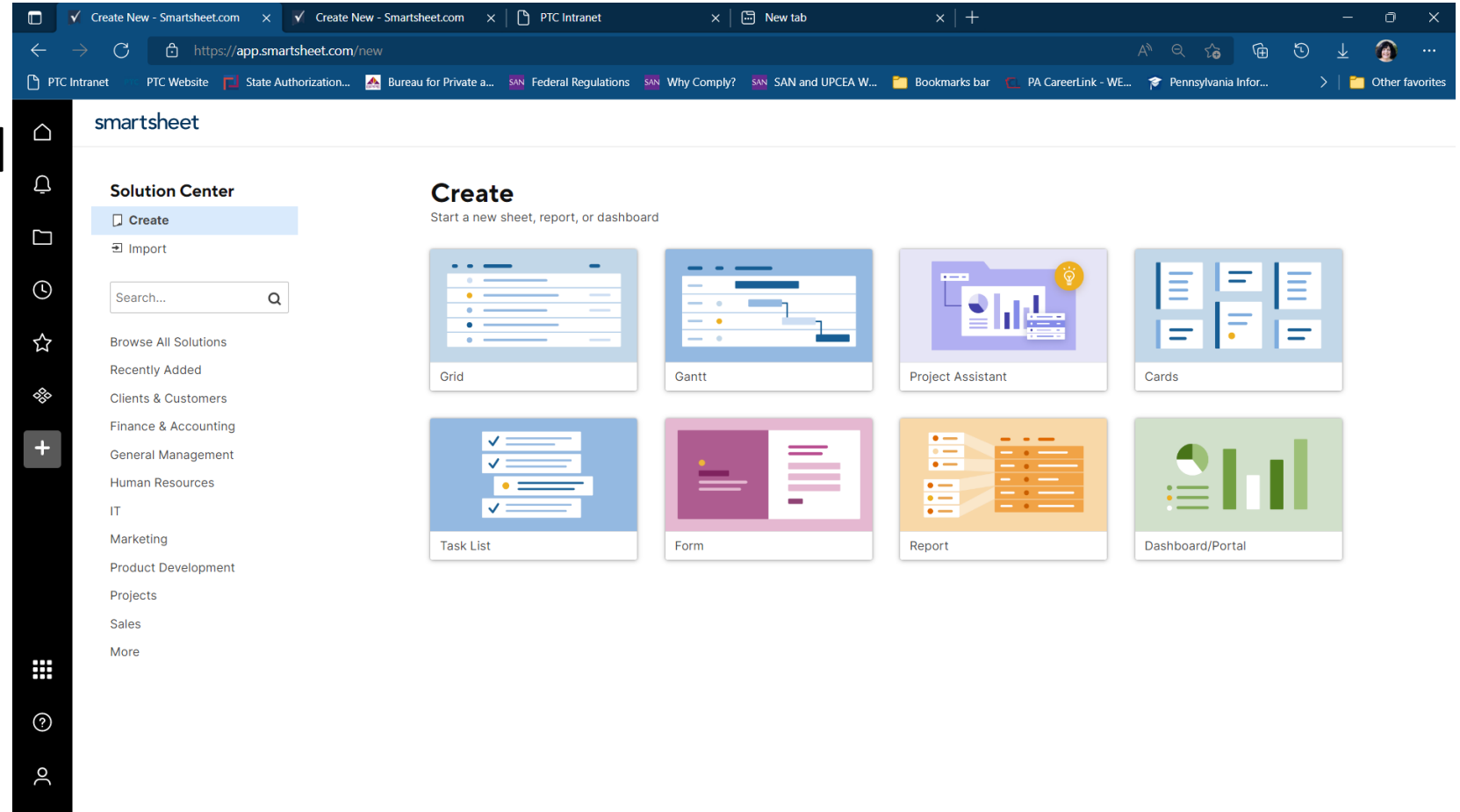
June 9, 2021, 5:53 PM by Melissa Brow...

Attach Files to Row 1



# Other Smartsheet Options

- Dashboard/Portal functionality
- Reporting Functionality
- Gantt
- Project Assistant







# Questions?

Please feel free to email me at

[Brown.melissa@ptcollege.edu](mailto:Brown.melissa@ptcollege.edu)