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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.

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.

- **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.
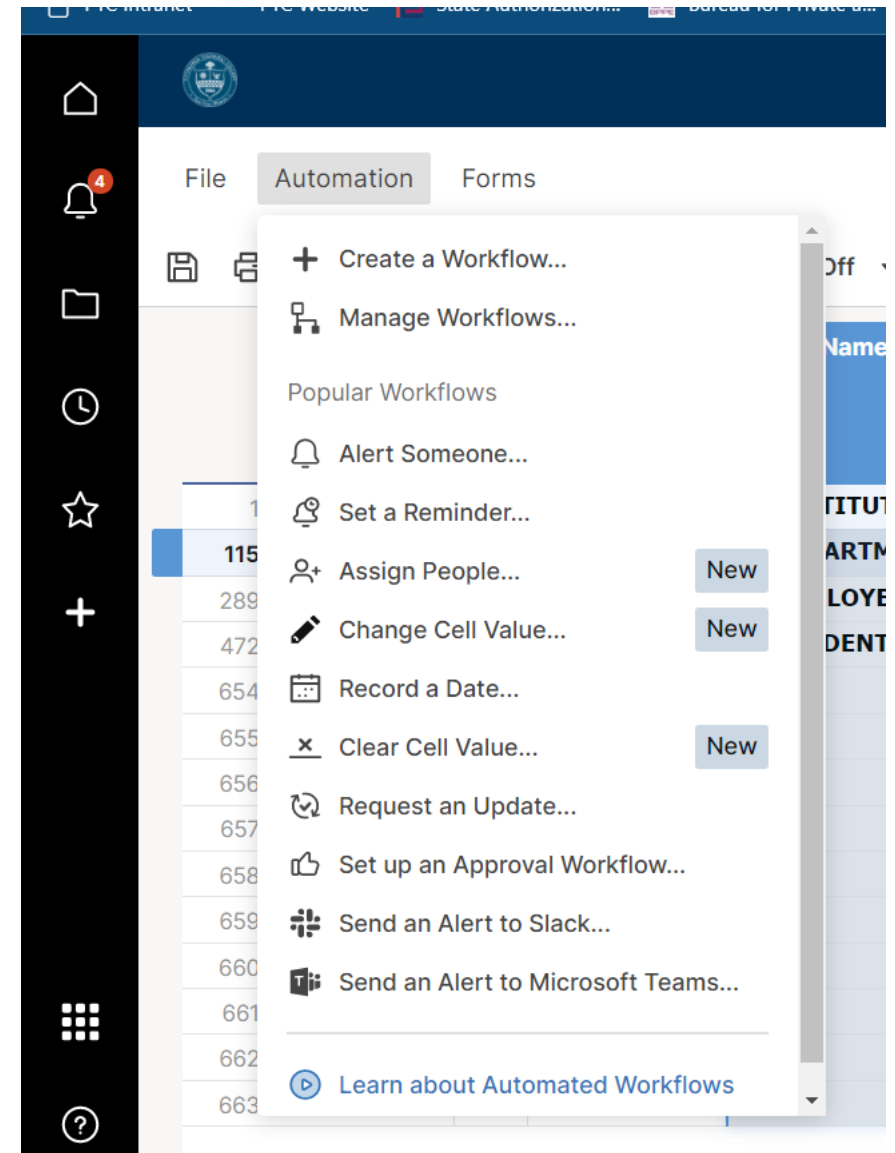
Workflow Options - Manual

Workflow Options - Template

• **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.

• **Survey Request**

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.

Smartsheet Layouts

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

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

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

Smartsheet Quick Collaboration

Other Smartsheet Options

- Dashboard/Portal functionality

- Reporting Functionality

- Gantt

- Project Assistant
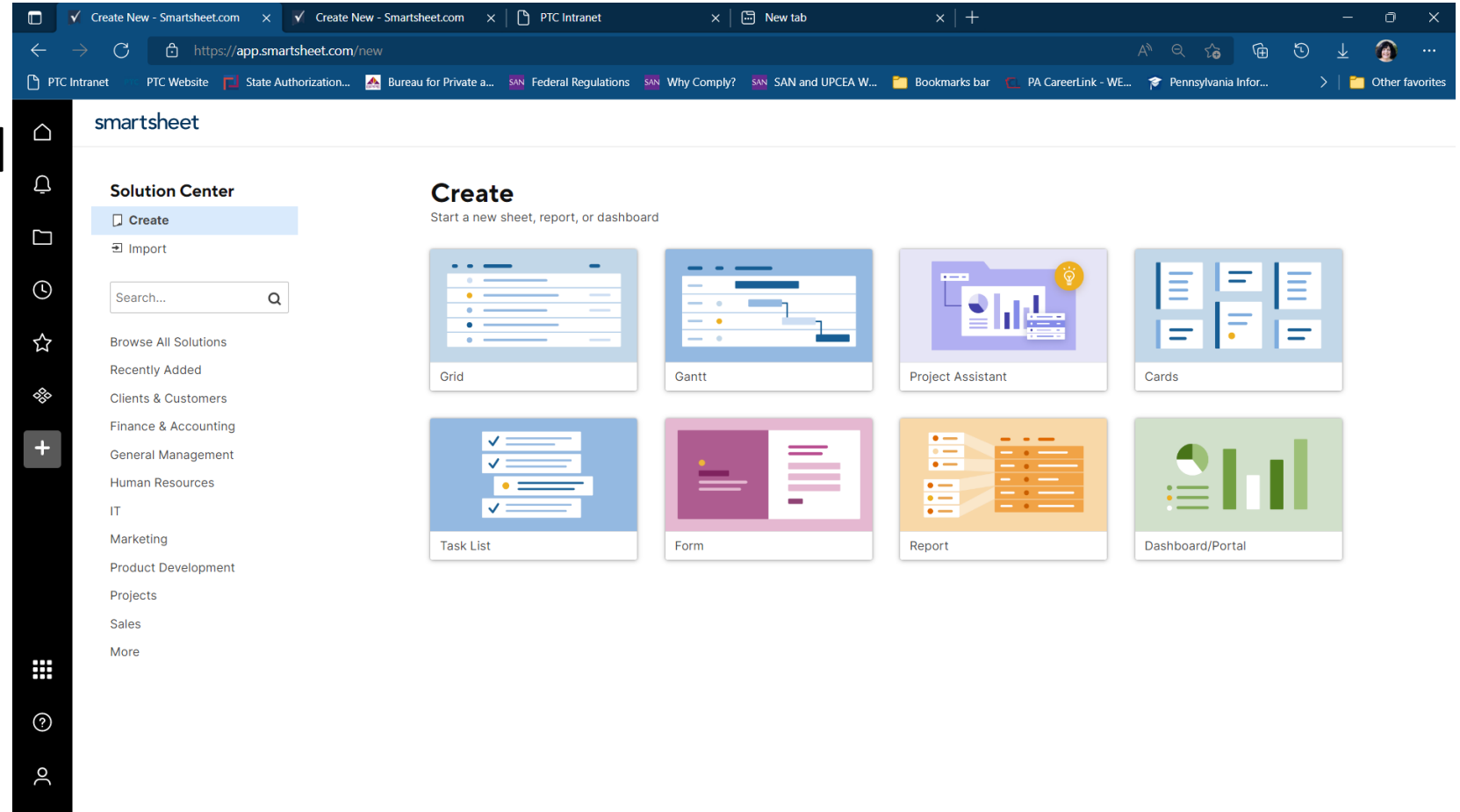
Questions?

Please feel free to email me at

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