



The Royal New Zealand  
College of General Practitioners  
Te Whare Tohu Rata o Aotearoa

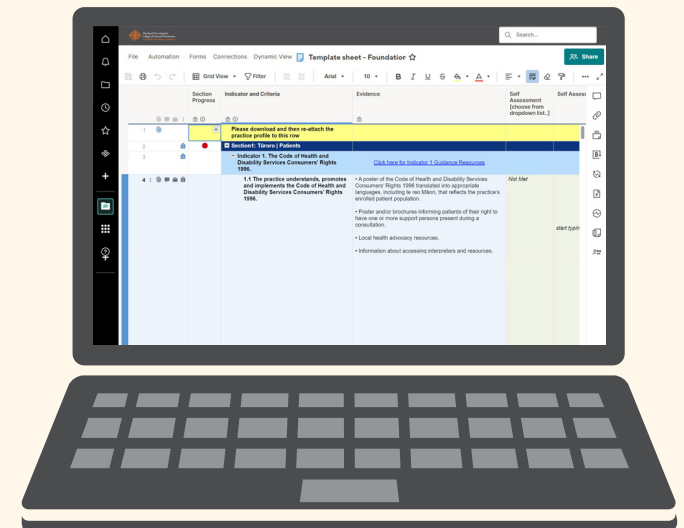
Need help using Smartsheet?

Email: [quality@rnzcgp.org.nz](mailto:quality@rnzcgp.org.nz)

Getting started with

 **smartsheet**

USER GUIDE | SEPTEMBER 2023



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# Logging in

## How do I access Smartsheet?

You can access Smartsheet

- > via your practice administration portal
- > by link, if someone has sent you an invitation
- > or by visiting [www.smartsheet.com](http://www.smartsheet.com).

When you reach the log-in page, you will be asked to enter your details. If you have not logged in to Smartsheet before, you will need to create an account:

The image shows a screenshot of the Smartsheet login page. The page has a white background with the Smartsheet logo at the top left. Below the logo, it says "Welcome back to Smartsheet" and "Don't have an account? [Create one](#)". There are two input fields: "Email" with the placeholder text "Enter your email" and "Password" with the placeholder text "Enter your password". To the right of the password field is a link that says "Forgot your password?". Below the password field is a checkbox labeled "Remember me". At the bottom of the form is a blue button that says "Sign in".

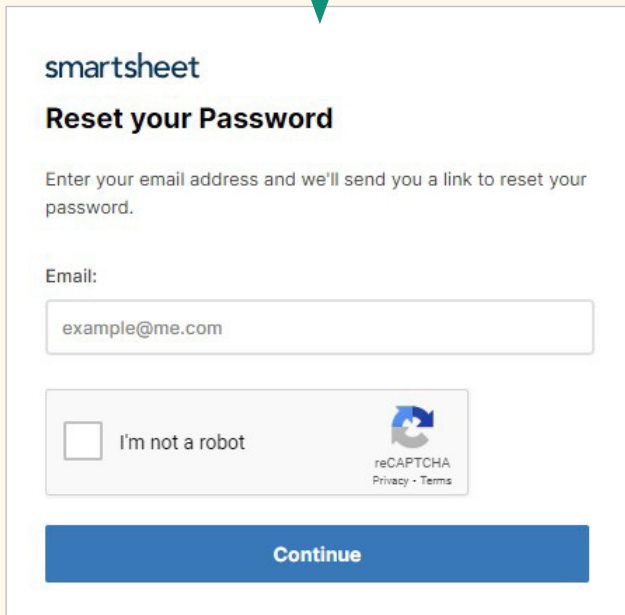
1 Enter your email address →

2 Leave the password box blank →

3 Click **Forgot your password?** ←

**NOTE:** Remember that the log-in details for your practice administration portal are different to your personal Smartsheet log-in details.

- 4** A box will appear, asking you to reset your password. Enter your email address, click **I'm not a robot**, and then **Continue**.




smartsheet

### Reset your Password

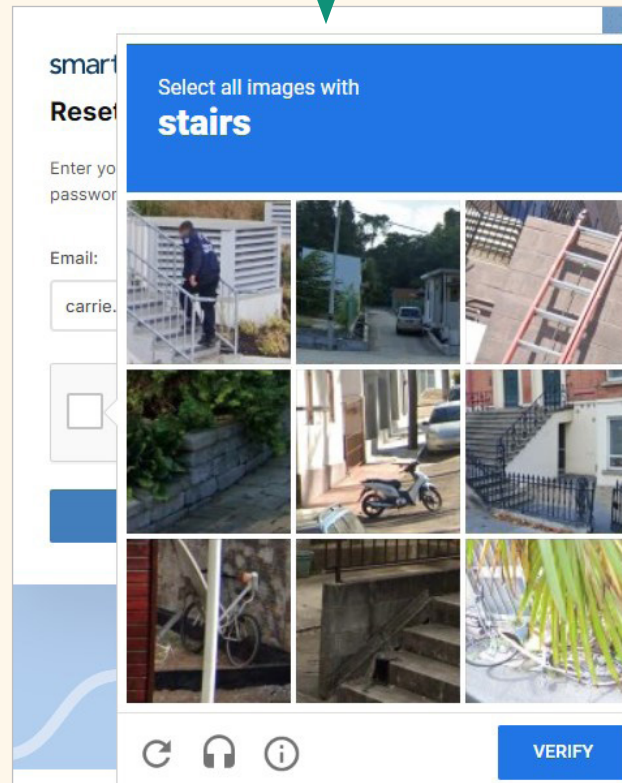
Enter your email address and we'll send you a link to reset your password.

Email:

I'm not a robot  reCAPTCHA  
Privacy • Terms

**Continue**

- 5** You will be asked to click on all the images with a particular object in them (e.g. stairs) to prove that you are a real person, and then click **Verify**.



smartsheet

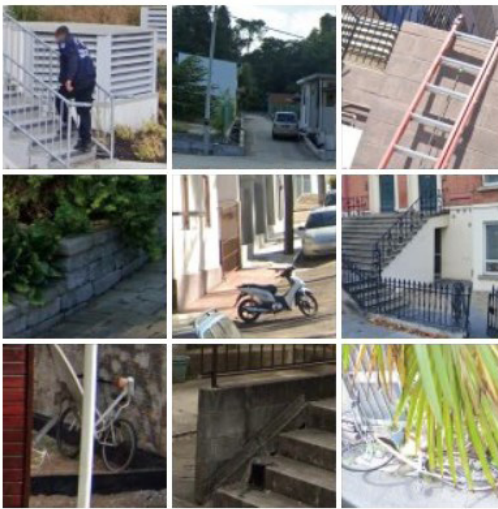
### Reset your Password




Enter your password

Email:

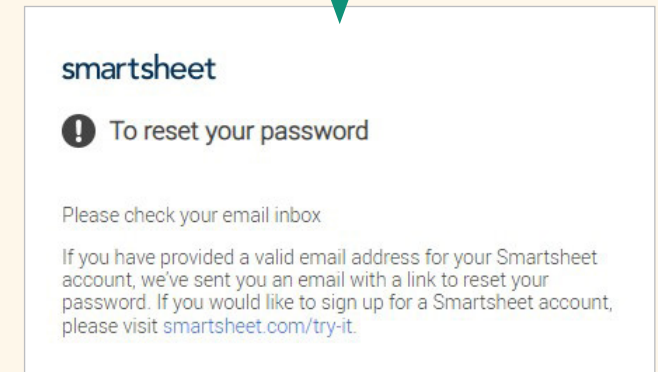
I'm not a robot

Select all images with **stairs**



   **VERIFY**

- 6** A box will appear, asking you to check your email inbox.



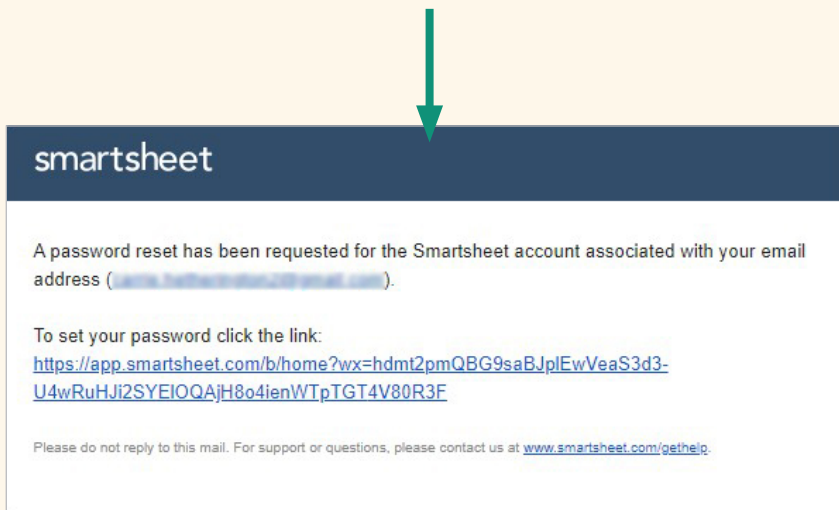
smartsheet

**!** To reset your password

Please check your email inbox

If you have provided a valid email address for your Smartsheet account, we've sent you an email with a link to reset your password. If you would like to sign up for a Smartsheet account, please visit [smartsheet.com/try-it](https://smartsheet.com/try-it).

7 Open the email, and click the link to reset your password.



8 A box will appear, asking you to set and confirm a password.

A screenshot of a web form titled "One thing first..." with the subtitle "Let's secure your account with a password". Below the subtitle, it says "Your password must have at least 10 characters. For better security, don't reuse a password from another site and use a mix of letters, numbers, and special characters." There are two input fields: "Password" with a "Create password" placeholder and an eye icon, and "Confirm Password" with a "Retype password" placeholder and an eye icon. A blue "Next" button is located at the bottom right. A green arrow points to the top of the form.

You now have your own Smartsheet account and can access it by logging in to your practice profile account or by visiting [www.smartsheet.com](http://www.smartsheet.com)

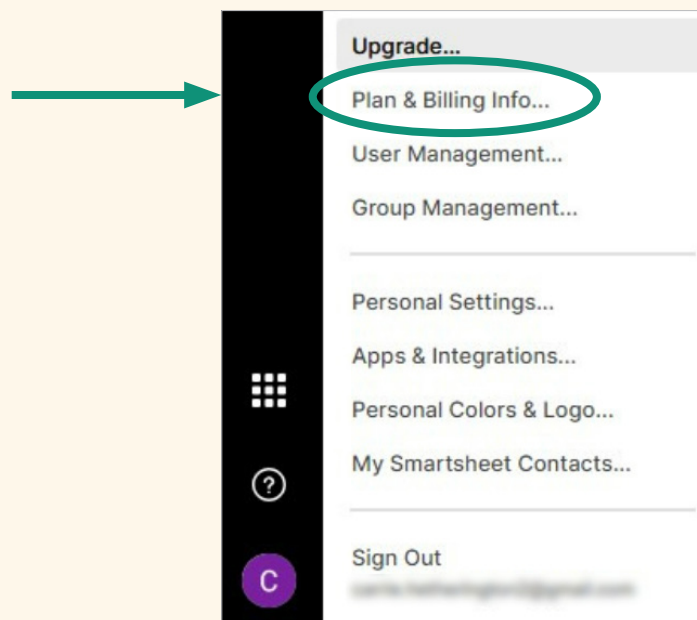
# Expiry alert

## Will my account expire in 30 days?

Practices may receive an alert within Smartsheet stating that their account will expire in 30 days. Please be assured that your assessment will not be erased.

Your assessment has been created under the College licence and includes everything you need to complete your assessment. However, Smartsheet sometimes provides users with a free trial of their advanced services, should they wish to use the platform for other projects independent of the College.

If you receive the alert, you can either let the 30 days expire, or you can turn it off by going to your **Account** (click on the profile icon), then select **Plan & Billing Info** > **Cancel Account** > **Switch to Free**.



# Sheets and dashboards


## Where do I write my assessment, and how can I track my progress?


When you log in to Smartsheet, you will be taken to the home page. This only displays the sheets and dashboards you have visited recently.

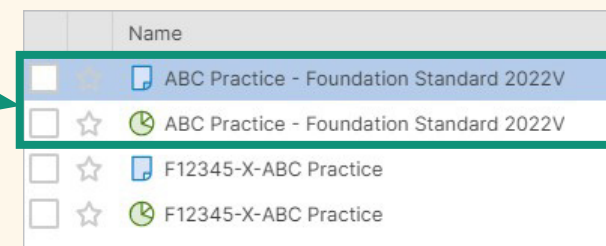
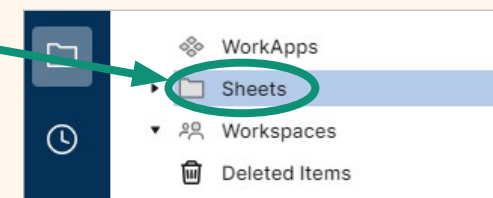
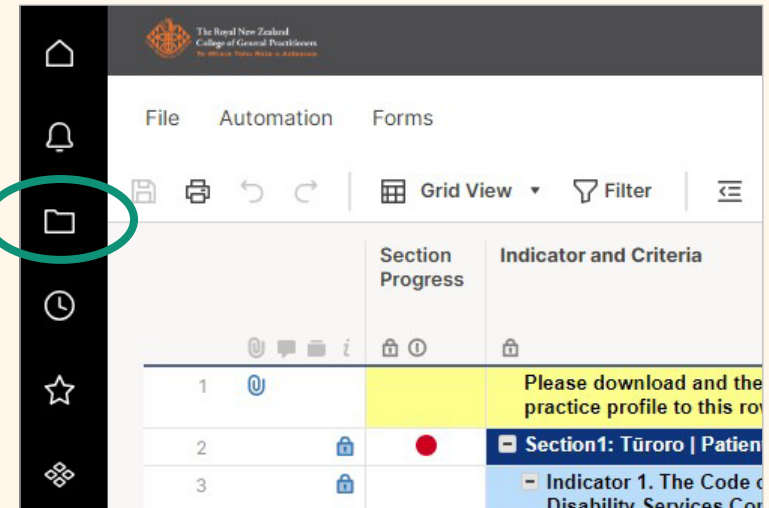
To view a list of all the sheets and dashboards you have access to, click on the **folder** symbol in the vertical toolbar on the left of your screen.

Then click on the **Sheets** folder. Your list of files will then appear, and every time you are given access to a sheet or dashboard, it will automatically become visible in your list.

When you have logged in to Smartsheet and opened your **Sheets** folder, you will notice that the Quality team have shared two items with you – a **sheet** and a **dashboard**.

 A **'blue paper' icon** indicates the file is a **sheet**. This is the file in which you will write your assessment and upload evidence.

 A **'green pie chart' icon** indicates the file is a **dashboard**. This is a live progress tracker, showing your progress in real time.



## Your sheet

You will use the two (**pale yellow**) cells in your **sheet** marked ① and ② below.

Your assessor will use the two (**pink**) cells marked ③ and ④.

Self Assessment [choose from dropdown list..]	Self Assessment [free text...]	Assessor Assessment [choose from dropdown list..]	Assessor's comment [free text...]
<i>Not Met</i>		Not yet assessed	start typing....



1

Self-assessment dropdown. Select **met**, **not met**, or **partially met**.



2

Self-assessment free text, where you can type your commentary.



3

Assessment dropdown. Your assessor will select **met**, **not met**, or **partially met**.



4

Self-assessment free text, where your assessor will type their findings.



## Your dashboard

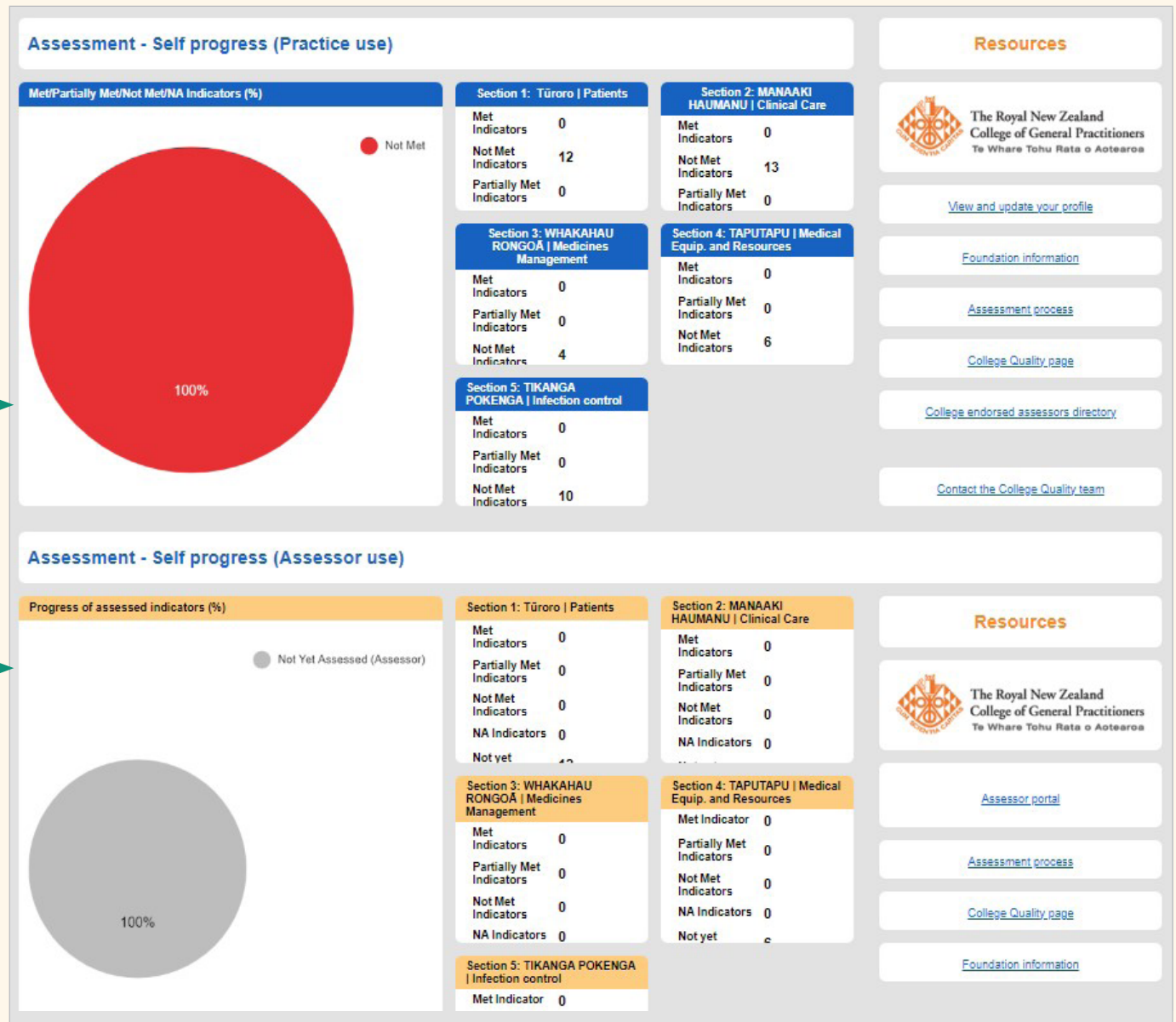
Your dashboard is an optional tool you can use to track your assessment progress.

You can't edit the dashboard, as it's connected to your sheet. Whenever you change something in your sheet – such as marking a criteria as 'met' – your dashboard will update to reflect it.

The **top dashboard** reflects the information your practice has entered in their sheet.



The **bottom dashboard** reflects the information your assessor has entered in the sheet. They also have the ability to track their own progress when assessing your criteria.



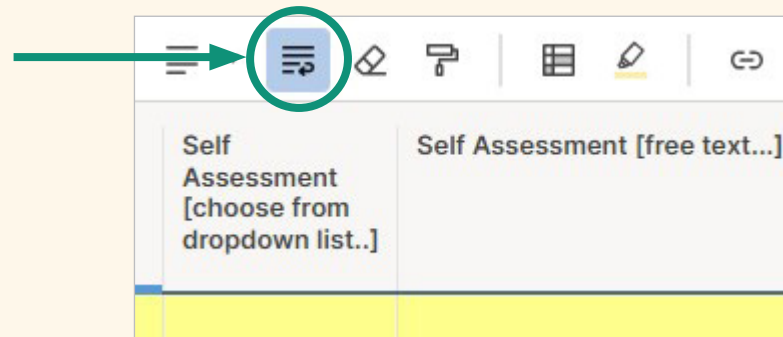
# Text formatting tips

## Is the text in a cell appearing as one continuous line?

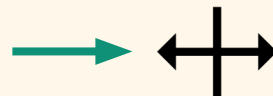
Often text will appear in one line and will appear cut off at the end of the cell.

The solution is to **wrap** the text so that it displays as a paragraph that is fully visible.

Either click the affected cell, or select an entire column, and then click the **wrap** symbol in the toolbar at the top of the sheet. Your text should now appear in full. If you have selected a whole column, it will automatically wrap the text in all the cells.



You can also alter the width of your columns by hovering your mouse between two column headers, and when the arrow turns into a **double arrow**, you can click and drag it to the left or right to change the width of the columns.



## How to add paragraph breaks in a cell

Using 'Enter' will move you to the next cell rather than inserting a space between paragraphs, so all your text in a cell may appear as a single paragraph.



*We have written a piece of bulk text, as an example, and would like to turn it into a paragraph.  
There needs to be a space between several of the lines to create a new sentence.  
We are able to do this, we just need to hold down two buttons on the keyboard.*

Hold down **Ctrl + Enter** at the same time to start a new line inside a cell. You can do this multiple times to increase the gap.



*We have written a piece of bulk text, as an example, and would like to turn it into a paragraph.  
  
There needs to be a space between several of the lines to create a new sentence.  
  
We are able to do this, we just need to hold down two buttons on the keyboard.*

## How to add macrons

You can't insert macrons directly into Smartsheet; however, you can paste letters with macrons into cells, or you can use the Māori keyboard:

### Option 1

Follow [these instructions on the Kupu o te Rā website](#) to download and install the Māori keyboard.

Once you have installed the keyboard, you can easily type vowels with macrons directly into Smartsheet cells:

- > **Apple Mac:** Hold down **Option** + the **vowel**. To insert an uppercase vowel, hold down the **Shift** key as well.
- > **Microsoft Windows:** Type ~ followed by the vowel. To insert an uppercase vowel, hold down the **Shift** key when you type the vowel.

[Kupu o te Rā](#) also details how to toggle between the Māori and English keyboards.

### Option 2

Find words with macrons in other Smartsheet cells, which you can then copy and paste into other cells – e.g. 'Māori' in Indicator 1.1.

### Option 3

Save a set of vowels with macrons in a Word document. You can then select the letter with your mouse, hold down **Ctrl + C** on your keyboard to copy it, and then paste it into your Smartsheet cell by holding down **Ctrl + V**.

#### How to create a set of vowels with macrons in a Word document for use in Smartsheet:

In a Word document:

- > **Ā:** Type **0100**, and then type **Alt + x** at the same time
- > **ā:** Type **0101**, and then type **Alt + x** at the same time
- > **Ē:** Type **0112**, and then type **Alt + x** at the same time
- > **ē:** Type **0113**, and then type **Alt + x** at the same time
- > **Ī:** Type **012A**, and then type **Alt + x** at the same time
- > **ī:** Type **012B**, and then type **Alt + x** at the same time
- > **Ō:** Type **014C**, and then type **Alt + x** at the same time
- > **ō:** Type **014D**, and then type **Alt + x** at the same time
- > **Ū:** Type **016A**, and then type **Alt + x** at the same time
- > **ū:** Type **016B**, and then type **Alt + x** at the same time

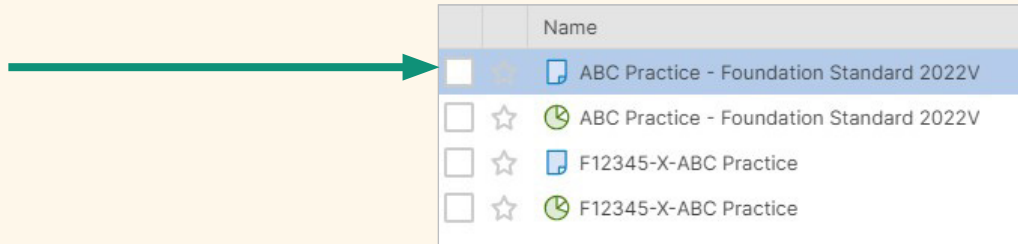
Then save your Word document for easy access to the full set of vowels with macrons.

# Sheet sharing

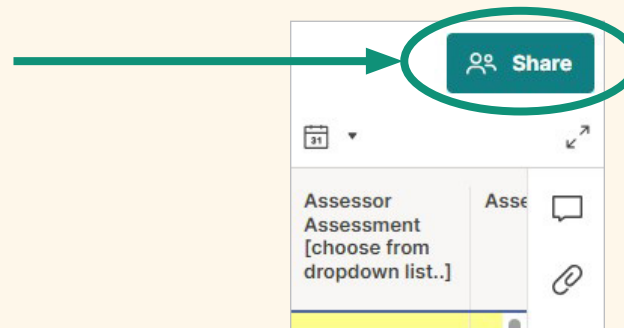
## How do I share my sheet with others?

You can share your sheet with staff, assessors, PHO leads, and other nominated individuals.

- 1 Open the assessment sheet you want to share.



- 2 Click the **Share** button in the top-right corner of the screen.



Once the **Share** button has been clicked, a **Sheet Sharing** box will pop up.

**3** Type one or more email addresses into the **Invite Collaborators** box. If you are entering multiple addresses, press the **space bar** before adding the next one.

**Sheet Sharing**

Invite Collaborators

Add people and workgroups

Permissions ⓘ Editor - can share

Invite Details ▾

Collaborators (7) This sheet is in a workspace: [Quality - Practice Accounts](#)

CH	Carrie Hetherington (carrie.hetherington@rnzcg...)	Owner	📄
LW	Lucy Wass (lucy.wass@rnzcgp.org.nz)	Admin	🔒
NC	NZ College of GPs (helpdesk@rnzcgp.org.nz)	Admin	🔒

Sheet Link ⓘ

<https://app.smartsheet.com/sheets/8j4hxfvx7wH7hX7wH769Gj4xpH5r2rQfm8JXHj1>

Default View: Grid View Edit

Close

**4** Select the **Permissions** in the drop-down box; e.g. you may only want someone to be able to view the sheet but not edit it. Click the ⓘ symbol next to **Permissions** for a description of what each permission means.

**5** Once you have added an email address, the pop-up box will change, allowing you to add a message (optional).

**Sheet Sharing**

Invite Collaborators

Add people and workgroups

Permissions ⓘ Editor - can share

Invite Details ▾

Subject

Carrie Hetherington invited you to edit the ABC Practice - Foundation Standard 2022V sheet

Add a helpful message

Notify people  Cc myself

Collaborators (7) This sheet is in a workspace

Cancel Share Sheet

**6** Tick the **Notify people** box to ensure the recipient(s) receive(s) a notification email.

**7** Click **Share Sheet** – this button will appear once you have added an email address.

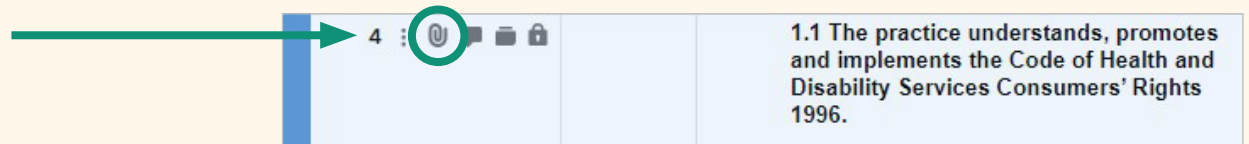
Recipients will receive an email with a link, and they will be asked to create their own Smartsheet account. This allows multiple people to work on the same sheet.

# Attaching evidence

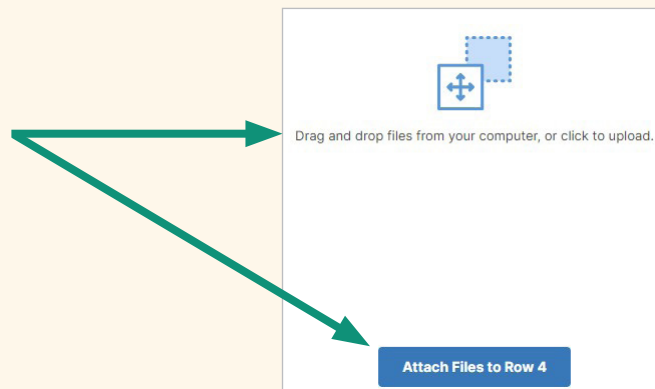
## How do I attach documents to my assessment?

The best way to organise your evidence is to attach it to each criteria (row). This helps both your staff and your assessor to find your documents.

- 1 Hover over the **first column** on the **row** of the criteria for which you want to upload a file, and click the **paperclip symbol** on the far left.

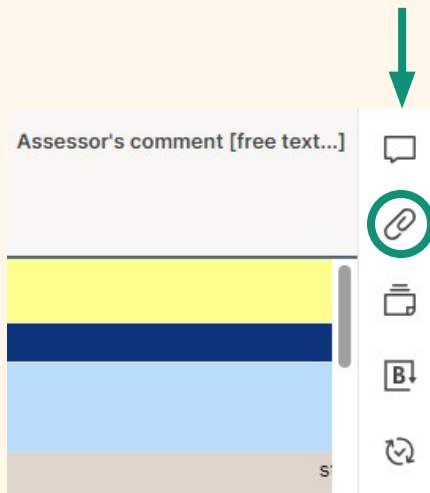


- 2 A box will appear to the right of your page. You can either drag the file you want to attach and drop it in the box, or upload it from your computer.



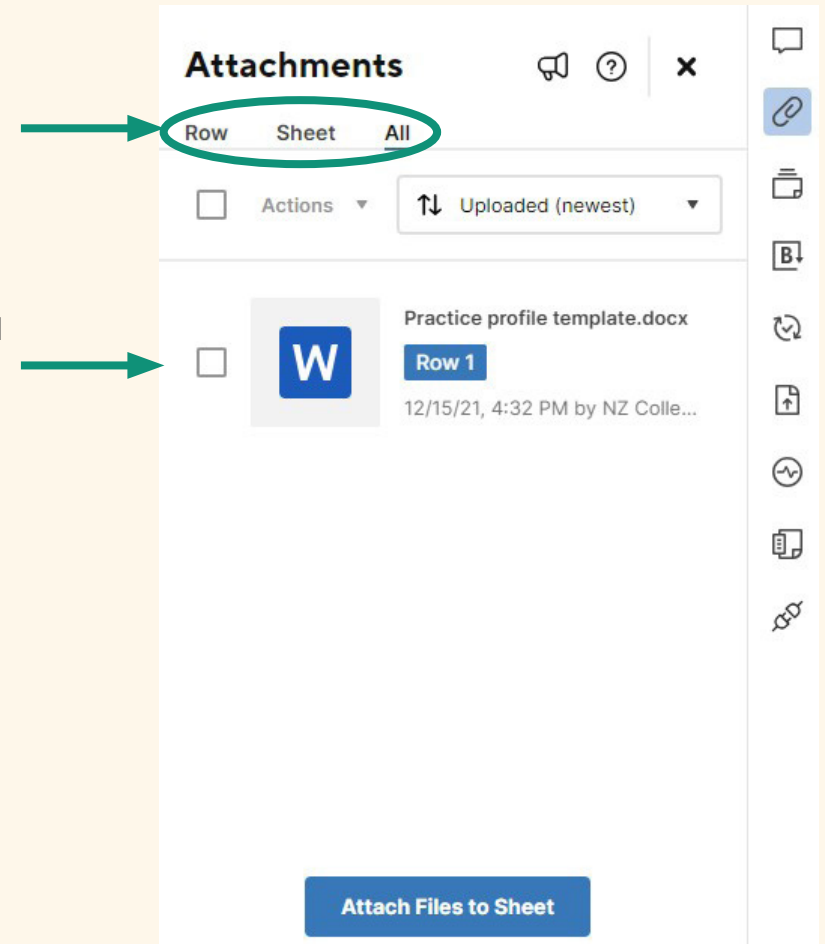
## How to view your attachments

- 1 Click the **paperclip symbol** in the toolbar on the right of your sheet:



- 2 An **Attachments** box will appear, allowing you to select whether to view your attachments by **Row**, **Sheet**, or **All**.

The attachments you have uploaded will appear in a list underneath, depending on which option you selected.





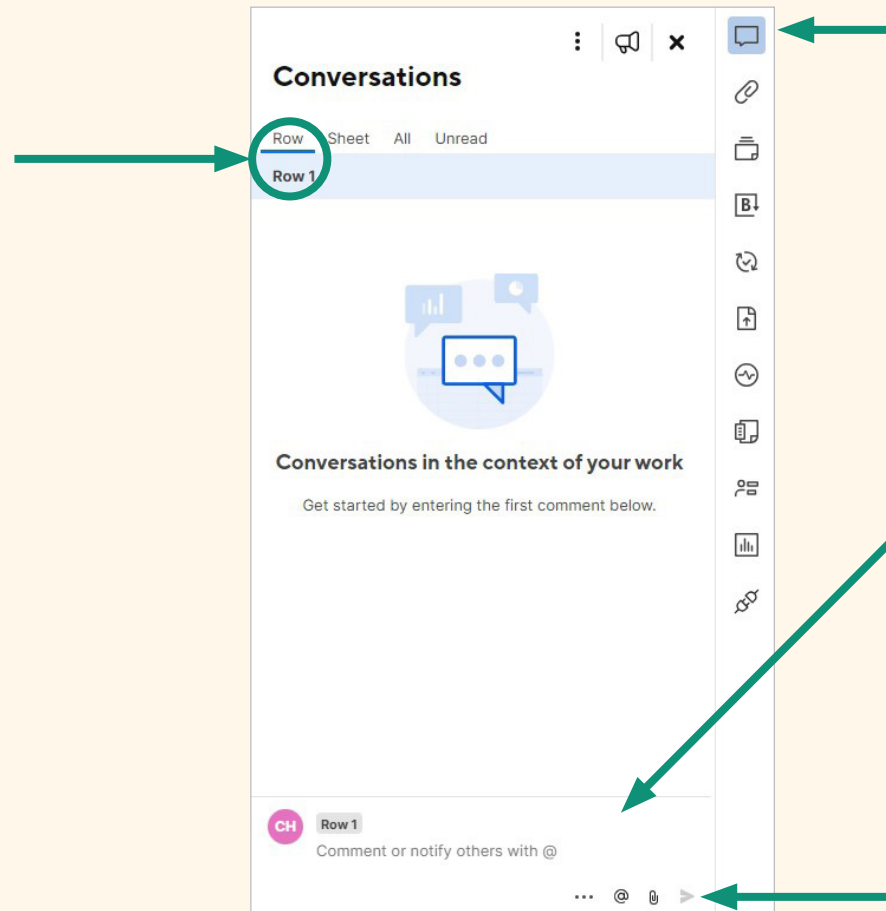
# Leaving comments

## How to avoid countless emails by leaving comments

To leave additional comments for staff or your assessor:

- 1 Click on the **row** you would like to comment on.

**NOTE:** If you want to find a conversation, you can filter the list of conversations by **Row**, **Sheet**, **All** or **Unread**.



- 2 Click on the **speech bubble symbol** in the vertical toolbar on the right of your assessment sheet.

- 3 Type your message in the box at the bottom.  
Type the **@ symbol** followed by a **name** if you want to address your comment to a particular staff member, assessor, or anyone with whom you have shared your assessment sheet.

- 4 Click the **plane symbol** or press **enter** to post your comment.

# Tracking

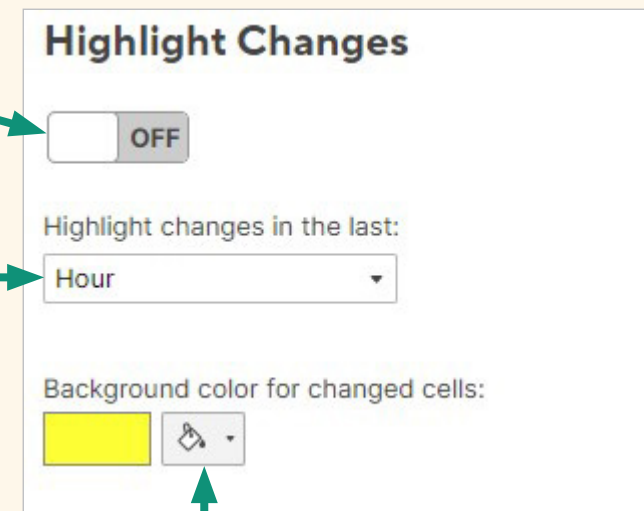
## How to make it easy to find the latest edits by using the tracking tool

Smartsheet can show any changes that have been made to your sheet by highlighting cells that have been modified.

A highlighted cell indicates that the practice or the assessor has made changes to that cell since the sheet was last viewed.

**1** This function can be turned on or off by selecting the **highlighter** button at the top of the toolbox and toggling the button **on** or **off**.

**2** You can search for changes made in a certain time period, e.g. the last hour.



**3** You can select the colour your cell will turn to signal that a change has been made.

Need more help with Smartsheet?  
Email the Quality Programmes team:  
[quality@rnzcgp.org.nz](mailto:quality@rnzcgp.org.nz)