USG Managed Services Project
Change Management
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The USG Managed Services project is designed to move institutional Banner systems to GeorgiaBEST Managed Services, hosted by USG Information Technology Services (ITS). Managed services takes on the daily administration of key enterprise applications so that the institution can focus their IT resources on other strategic priorities. For institutions on GeorgiaBEST Managed Services, ITS updates, upgrades, monitors and maintains their Banner systems.

All institutions will move their Banner instances to GeorgiaBEST Managed Services via the USG Managed Services project through June 2021.

![USG Managed Services Proposed Deployment Timeline](image-url)
**PROCESS**

The onboarding process associated with the USG Managed Services project is broken down into five distinct steps (as is illustrated in graphic below):

- **DISCOVERY (7-8 WEEKS)**
  - **Discovery** phase of the onboarding process encompasses the initial engagement for the project between USG ITS and the institution moving to GeorgiaBEST Managed Services. During this portion of the process the following elements are used to prepare the institution for completing:
    - **Data Collection Document (DCD):** Completed by the institution in advance of project start up to help ITS configure the school’s managed services Banner environment. Available via [project website](#).
    - **Campus Visit/Project Review:** On campus meeting attended by the institution’s project team and ITS staff prior to the start of the project for any given cohort. This meeting provides the school the opportunity to get detailed answers from the ITS project team on all aspects of the project.
• **Integrations and Responsibilities Review**: A webinar between the institution and ITS to review in detail configurations for all required integrations and to determine if ITS or the institution is responsible for any or all updates. This includes specifics of third party system functionality.

• **Customizations Review**: A webinar review between the institution and ITS to review all institutional Banner customizations required for their managed services environment. All customizations are required to be fully documented for functionality and permissions prior to the start of your cohort.

• **DocuSign of Service Support Agreement (SSA)**: This required document is used to identify key campus contacts and to specify the support ITS will provide to the institution. No actual signatures are required. *(See Appendix A)*

**DESIGN (7-8 WEEKS)**

The Design phase of the Managed Services project includes the initial construction and configurations of the institution-specific environment.

• **Complete ITS Pre-PROD Instance Checklist**: This checklist provides information regarding delivery of Banner production databases copies to ITS for environment configuration. *(see Appendix C)*

• **Pre-PROD Environment Configuration**: ITS process of building out the institution’s hosted environment.

• **Integrations Configuration**: Connection of all third party integrations to the Pre-PROD Banner instance.

• **Customizations Configuration**: All Banner customizations necessary to the project are built in the Pre-PROD Banner instance.

**SYSTEM/USER TESTING (4-5 WEEKS)**

This phase of the onboarding process covers all manner of both system and user testing.

• **System Integrations Testing**: ITS and institutional system testing of integrations and printer configurations in the Pre-PROD hosted environment to ensure the level of functionality matches the on premise PROD instance of Banner.

• **System Performance/Load Testing**: Load testing to ensure no significant performance degradation in the Pre-PROD hosted environment compared to existing on premise PROD instance.

• **Banner Functional User Testing**: Functional institutional testing to ensure Pre-PROD hosted environment performs identically to their on premise PROD instance of Banner.

• **Printer Testing**: Functional institutional testing to ensure that any local print jobs being produced from the Pre-PROD hosted environment print correctly.

• **Customization Testing**: Functional institutional testing to ensure all customizations configured in the Pre-PROD hosted environment function correctly.

• **Pre-PROD Signoff**: Institutional confirmation that all technical and functional testing in the Pre-PROD hosted instance of Banner have been completed and that the system is working as desired.
GO LIVE (5-6 DAYS)

This phase of the Managed Services project can vary from institution to institution, but largely entails a five to six day engagement with an onsite visit from ITS staff for the last two to three days to support the final stages of the onboarding process. This process typically begins at the close of business (COB) on a given Thursday when the institution uploads their data set via Managed File Transfer (MFT). ITS DBAs will begin to validate that the required data has been provided in order to build out the institution’s PROD instance of the hosted Banner environment.

- **Freeze Banner Data Updates**: At the beginning of the go live period, institutions are required to restrict all Banner data updates to their on premise PROD instance of Banner. No online or batch data updates are allowed during this period while ITS builds the PROD hosted environment.
  
  However, query access to the school’s on premise Banner instance is available during this period.
- **Complete ITS PROD Instance Checklist**: Institution sends ITS a new copy of their on premise PROD Banner database via MFT. (See Appendix C)
- **PROD Environment Configuration**: ITS builds out the school’s PROD hosted environment Friday, Saturday and Sunday.
- **ITS Onsite Validation Signoff/support**: ITS onsite Monday/Tuesday and available to institution’s IT staff, power/functional users to assist in troubleshooting and resolving issues during final testing and go live.
- **Power User Validation**: Portion of the go live phase (usually taking place on Monday) when an institution’s power users are given the opportunity to do a final check on the PROD hosted instance, integrations and customizations.
- **Functional User Validation**: Functional end users perform one final test to ensure key functions perform as expected.
- **Go Live**: Hosted PROD environment goes live (normally Tuesday) now available to all faculty, staff, and students.

OPERATIONAL

The Operational phase of the onboarding process encompasses all regular functional services following go live to include:

- **Resolve Open Issues**: Once the institution is live in ITS Managed Services, ongoing technical and functional support are available from ITS to resolve normal Banner upgrade, testing and support. Institutions will continue bi-weekly status meetings. These meetings are used to discuss strategic initiatives, campus projects, and Ellucian/GA Mod releases.
- **DocuSign of PROD**: Institutional confirmation all technical and functional testing has been completed in the PROD hosted instance of Banner and the system is working as expected.
In order to successfully migrate an institution’s Banner instance to GeorgiaBEST Managed Services each institution is expected to form an institutional project team to work in conjunction with the ITS project team, both during and after the USG Managed Service Project. This following section details the roles and responsibilities of the institutional project team.

**Project Manager**
- Overall lead for the institution and included in all meeting invitations and communications related to the USG Managed Services project initiative at the institution.
- Responsible for the coordination of resources, equipment and meeting logistics.
- Responsible for facilitating the completion of the Data Collection Document Survey. Responsible for information/task reporting to USG, internal campus resources and updating the USG Managed Services project schedule related to institutional tasks in Smartsheet (See Appendix E).
- Identify other institutional roles when necessary:
  - System Testing
  - User Acceptance Testing

**Functional Lead(s)**
- Responsible for the coordination of business needs, business processes, flows and diagrams.
- Provide historical functional information on existing systems setup and configuration.
- Prioritize user and functional requirements for system testing.
- Plan for User Acceptance Testing.
- Identify and document local processes.
Technical Lead

- Provide technical information/knowledge on existing systems setup and configuration.
- Identify and document customizations.
- Point of contact for additional technically-related items:
  - Architecture/infrastructure/networking items related to existing Banner systems and modifications made by the institution.
  - Local interface configurations
  - Authentication/Local security integration
  - Security Administrator

Change Management Lead

- Point of contact for creating communications, training and other local change management activities.
- Customize Change Management Toolkit for institution:
  - ITS provides templates for the institution to modify and use to communicate local messages related to the USG Managed Services Project to institutional staff at various stages of the project.

- User community
- Assist with the institutional training and communication at your institution.

USG MANAGED SERVICES PROJECT TEAM

The following information represents the USG Managed Services Leadership Structure:

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Scoville</td>
<td>Chief Technology Officer</td>
</tr>
<tr>
<td>Karen Nunn</td>
<td>Executive Director of Academic Services</td>
</tr>
<tr>
<td>Doug Hyche</td>
<td>Project Management</td>
</tr>
<tr>
<td>Phillip Mitchell</td>
<td>Technical Lead</td>
</tr>
<tr>
<td>Ted Schmidt</td>
<td>Technology Strategist</td>
</tr>
<tr>
<td>JoE Silva</td>
<td>Change Management/Documentation</td>
</tr>
</tbody>
</table>
PREPARATION

This section details what the institution and the USG Managed Services project team should expect to complete as they prepare to migrate their Banner instance.

BIWEEKLY PROJECT STATUS MEETINGS

Every two weeks, the USG Managed Services Project Manager leads a meeting with each individual institution preparing to migrate during their cohort. During these virtual meetings, we will discuss action items required to ensure a successful migration. Agendas are provided the day before each meeting.

As we get closer to your institution’s migration, schedules and tasks will become more specific. This includes tasks such as applying outstanding upgrades and updates, as well as verifying any changed data.

Note: Ad hoc cohort-wide status meetings will also take place as needed.

COMMUNICATIONS

Because there should be no functional change to the Banner instance as part of the migration, change management aspect of this project focuses on communications. Before, during and after your migration, you will need to communicate with your functional users, end users, and stakeholders. Because each institution is unique, each institution’s change management lead, along with the project team, should develop a communication plan to meet the needs of their institution.

To assist with this, the following email templates available in Appendix C:

- **Request for Testers**: General request for users to assist with functional testing
- **Details for Functional Testing**: Information regarding when testing will begin
- **Migration to GeorgiaBEST Managed Services**: Information/instructions on pre-migration
- **Migrating to GeorgiaBEST Managed Services Tomorrow**: Final migration details
- **Successful Migration to GeorgiaBEST Managed Services**: Post-migration details/instructions

It is incumbent on each institution to determine the type of messaging to send, who will be in receipt, and when the communications should be sent.
TRAINING

The USG Managed Services project will not result in any change in Banner functionality for functional end users, including staff, faculty and students. Therefore, no functional end user training is being developed or provided for this particular project.

In order to assist institutional project teams complete their tasks, project training will be provided as needed. As part of the Change Management toolkit, reference materials for updating your project plan in Smartsheet, how the USG Managed Services project will be managed, and how to use communication templates will be provided via the project website.
APPENDIX A - SERVICE SUPPORT AGREEMENT

INSTRUCTIONS: Please fill in ALL blanks below and return via email to Doug Hyche, Project Manager for USG Managed Services, at Doug.Hyche@usg.edu

This Service Support Agreement (SSA) is entered into this first day of _________ (“DATE”) by and between the Board of Regents of the University System of Georgia Information Technology Services (“BOR” or “BOR/ITS”) and ________________ (“INSTITUTION”).

WHEREAS, INSTITUTION is leveraging information technology support provided by BOR for provision and technical management of the hosted integrated services for the Banner Student Information System (Banner) and other client-selected integrated applications; and

WHEREAS, BOR incurs infrastructure and administrative personnel costs for support of hardware, storage, operating system(s), database(s), application services, application installations, and configurations, collectively known as “ENVIRONMENTS” used by INSTITUTION for the Banner application.

NOW, THEREFORE, the parties do hereby mutually agree as follows:

I - GENERAL SERVICES

This SSA specifies the information technology support that BOR will provide to INSTITUTION. GeorgiaBEST Managed Services will provide reliable and efficient database administration and system support including monitoring of the environments.

BOR/ITS will provide the following to INSTITUTION:

Equipment and Services: BOR will provide, manage and maintain all server hardware, Data Center Environment, monitoring, backup and recovery, database administrator services and system administration services.

INSTITUTION responsibilities are available at:

http://www.usg.edu/georgia_best/managed_services/faq

II - AUTHORIZED POINTS OF CONTACT
The following key staff identified as "Contact Personnel" are responsible to all conditions of this exhibit on a 24/7 year-round:

INSTITUTION Executive Contact

BOR Executive Contacts: Dr. Bobby Laurine, Vice Chancellor and Chief Information Officer and John Scoville, Associate Vice Chancellor and Chief Technology Officer

INSTITUTION Administrative Contact

BOR Administrative Contact: Karen Nunn, Executive Director of Academic Services and Beverly Norwood, Associate Vice Chancellor of Enterprise Resource Management

INSTITUTION Technical Support Contact:

INSTITUTION Process Control Contact:

BOR Technical Support Contact: Andrea Williams, Service Manager and Hope Dunagan, Assistant Director of GeorgiaBEST and Phillip Mitchell, Academic Technical Services Manager
III - SUPPORT ASSISTANCE

In the event that you encounter any issues or problems in your environment, please contact the ITS Customer Support Department and the Helpdesk provide a single point of contact, 24 hours a day, seven days a week to receive service requests and to log, track, and resolve support requests. For more information on the ITS Customer Services, please visit:

http://www.usg.edu/customer_services/

Information Technology Services (ITS) Helpdesk business hours are 8 a.m. to 5 p.m. Monday through Friday, with the exception of Board of Regents holidays.

Non-Emergency After-Hours Support

If you need non-emergency after-hours assistance (i.e., evening, weekend, or holiday), we request that you notify us at least two weeks in advance. To request non-emergency after-hours assistance:

- Go to the Self-Service Support Request website and select Submit Support Request
- E-mail helpdesk@usg.edu
- Call 706-583-2001, or 1-888-375-3697 (toll free within Georgia)

If you need after-hours assistance with ITS product or service related business interruption or production down issues, call the ITS Helpdesk at 706-583-2001, or 1-888-375-3697 (toll free within Georgia) and listen to the menu prompts for instructions on how to contact ITS on-call support.

IV - ADDITIONAL RESOURCES

- For Maintenance Schedules and Service Level Guidelines, visit the ITS Customer Services:

  After Hours Support Information website
APPENDIX B – ONBOARDING CHECKLIST DOCUMENT

This document is employed during both the DESIGN and GO LIVE phase of migration. ITS needs all institutions to provide a copy of your Banner production databases for system and user testing. We ask that you prepare the following items for transmission to ITS; which will be used to create the production copy of your database.

1. Spfile/control files

2. Data files

3. Archivelogs

4. RMAN backup log (for review)

5. A copy of your production RMAN backup.

6. A full export dump of your production database:

   Please use the following to create your database dump files:

   expdp system/password full=y dumpfile=data_pump_dir:<sid name>full_1%U.dmp, 
   filesize=1900M logfile=data_pump_dir:<sid name>_fullexp.log job_name=<sid>fullexp

   On the file size you can use any number between 1900M and 4000M.

   Please use the following to verify your data_pump_dir:
   - Check the current Location of DATA_PUMP_DIR in dba_directories
   - SQL> select owner, directory_name, directory_path from dba_directories where directory_name = "DATA_PUMP_DIR";

   If location of DATA_DUMP needs to be changed use:

   SQL> CREATE OR REPLACE DIRECTORY "DATA_PUMP_DIR" AS " ";

   Confirm the change in dba_directories.
7. A relative (not absolute) path "gzipped" tarball file of your Banner software tree

8. A list of file sizes / tablespaces / local apps
   a. Please referenced attached script. This will provide file sizes.

9. The output from the ALTER DATABASE BACKUP CONTROLFILE TO TRACE sqlplus command

10. A list of the upgrades you have yet to apply to your production database. Please include patches as well as releases.

11. A list of users (outside of the Banner delivered users) that own objects in the database (ex. BossCARS, jdoe, etc.)

12. A copy of the current init.ora and config.ora files

13. If INB and SSB are run on a different machine, a tar files of the webprocs directory (this would be the directory that holds the homepage.htm file, css, wthelp directories, etc.) We do not need the generated FMXS.

14. Please put INSTITUTION local scripts that you run as crons in the local directory on file manager.

When you are ready for the data transfer, we will use the MoveIT file transfer system located at https://files.usg.edu. Please use your existing MoveIT credentials to upload the datasets to the following directory - ManagedServices\INSTITUTION\Onboarding - Banner dataset. If you have any questions or concerns, please email Andrea Williams at Andrea.Williams@usg.edu.
APPENDIX C – EMAIL TEMPLATES

REQUEST FOR TESTERS
(Audience: Functional Users)

Subject: Need Your Expertise for Functional Testing
Hello:
As you may be aware, we are currently in the process of migrating our locally hosted Banner Student Information System to GeorgiaBEST Managed Services. As part of this project, we will be conducting functional testing of our Pre-Production (Pre-Prod) Environment and need your assistance.
While there are no planned changes in functionality, we need to test our Pre-Prod environment to ensure a successful migration. This includes testing for Banner 9 Admin, Third Party Integrations, and Banner 8 Self Service.
Testing will take place between MMDDYYYY and MMDDYYYY. If you can assist with functional testing, please reply to this email by MMDDYYYY. Everyone participating will be provided with a test plan and instructions on how to complete the testing.

COORDINATION OF TESTING
(Audience: Functional Users Participating in Functional Testing)

Subject: Details for Functional Testing
Hello:
Thank you for volunteering your time to help us complete the functional testing of our Pre-Prod environment. This is a critical contribution as we prepare to migrate to GeorgiaBEST Managed Services.
We will begin testing on MMDDYYYY at HH:MM at <<location>>. At that time, we will review the instructions and provide applicable test plans.
If you have any questions regarding this task within our USG Managed Services project, please contact the Project Manager, <<name/email>> or the Functional Lead, <<name/email>>.

PRE-MIGRATION ANNOUNCEMENT
(Audience: Functional Users, Technical Staff, Institutional Project Leadership)

Subject: Migrating to GeorgiaBEST Managed Services
Hello:
We are scheduled to migrate to GeorgiaBEST Managed Services beginning MMDDYYYY. This migration should conclude by MMDDYYYY. During this migration, you will only have query access to
the Banner Student Information System. Please plan accordingly. We will send another reminder regarding the migration period before the migration begins.

If you have any questions regarding this announcement, please contact the Project Manager, <<name/email>>.

---

**MIGRATION ANNOUNCEMENT**
(Audience: Functional Users, Technical Staff, Institutional Project Leadership)

**Subject:** Reminder: Migrating to GeorgiaBEST Managed Services Tomorrow

Hello:

As a reminder, we are scheduled to migrate to GeorgiaBEST Managed Services beginning tomorrow, MMDDYYYY. This migration should conclude by MMDDYYYY. Beginning tomorrow, you will only have query access to the Banner Student Information System until the migration is complete.

When the migration is complete, we will send another announcement with a new URL for accessing our Banner Student Information System.

If you have any questions regarding this announcement, please contact the Project Manager, <<name/email>>.

---

**MIGRATION COMPLETE**
(Audience: Functional Users, Technical Staff, Institutional Project Leadership)

**Subject:** Successful Migration to GeorgiaBEST Managed Services

Hello:

We have successfully completed the migration of our Banner Student Information System. The system is now live and you can now access the application.

Please be aware that there is a new URL for you to access the application: https://xxx.usg.edu. Before launching Banner for the first time after migration, we strongly suggest that you clear your cache. Remember to update any existing bookmarks or shortcuts you may have set.

If you have any difficulties logging in, please submit a request to <<insert local resource>>.
APPENDIX E – SMARTSHEET

Each institution within a USG Managed Services project cohort will receive several items in Smartsheet including:

- Institution specific project plan
- Data Collection Document (DCD) submitted data
- Bi-Weekly Project Status meeting agenda
- Institution specific open action items report

By using Smartsheet, we are able to link individual institutional project plans into the overall project plan for the USG Managed Services project.

SMARTSHEET LOGIN

All Smartsheet access to institutions’ project plans will be granted through individuals’ institutional email addresses. If you do not have a Smartsheet login, you will have the opportunity to create one when you are invited to your project plan.

- You already have a Smartsheet Login:
  - You will receive an email indicating your project plan and other sheets have been shared with you. The email will include a link directly to your plan or other sheets, and you will be able to see them under your Home tab in Smartsheet.

- You do not have a Smartsheet Login:
  - You will receive an email indicating your project plan and other sheets have been shared with you.
  - Your first action will be to set up your password. Click the button “Open in Smartsheet” within the email to create your account.
  - Create and confirm your password.

Commented [EH1]: • EPH – I replaced the picture below that had Teresa’s name with the new image below with Hauser’s name
Your project plan will open within Smartsheet.

**TYPE OF ACCESS**

To open Smartsheet, enter [www.smartsheet.com](http://www.smartsheet.com) in your browser. You are then prompted to login with your email address (user name) and password. Each USG Managed Services project cohort will receive links for each Smartsheet page to which you have been granted access.

If you happen to close your project plan or other sheet, you can always access it under your **Home** tab, which is in the upper left corner of the application. Everything that you have access to within Smartsheet will be listed here.
USG MANAGED SERVICES PROJECT PLAN OVERVIEW

The Institutional Project Manager is responsible for updating their institution’s project plan on a bi-weekly basis.

- Institutional Project Managers need to update their project plan by close of business two days prior to your scheduled bi-weekly status meeting.
- There are five columns (described in detail in the next section) that Institutional Project Managers have the ability to edit:
  - Percent (%) Complete
  - Estimated Completion Date
  - Actual Start Date
  - Actual End Date
  - Comments

The information from each institution’s project plan, as well as information gathered from cohort and institutional calls will be used to update the overall USG Managed Services Project Plan and update project leadership on overall status and any areas of risk. This snapshot depicts all columns within your project plan. Each institution’s project manager is responsible for updating their columns each week.
COLUMNS TO BE UPDATED BY INSTITUTIONAL PROJECT MANAGER

The institution’s project manager is responsible for updating columns listed below:

A. % Complete: We recommend using only three values in this column.
   - Tasks not yet started should remain at “0%”
   - When you start a task, indicate “50%” in this column (regardless of how much of the task may be completed).
   - When you finish a task, indicate “100%” in this column.
B. Estimated Completion Date
   - Enter when you believe your team will be finished.
C. Actual Start Date
   - When you start a task, update this field to the actual start date.
D. Actual End Date
   - When you complete a task, update this field to the actual date your team finished.
E. Comments
   - Use this field if you wish to record any notes or comments regarding the task.

Prompts for Updates: If a task’s planned start date has passed, but no updates have been made to the Estimated Completion Date, Actual Start Date, or Actual End Date columns, then “Please Complete” will appear within the plan. This prompt for an update is generated automatically. However, the institution’s project manager can overwrite this by entering the appropriate information.
ADDITIONAL COLUMNS

The USG Managed Services Project Team at ITS will update the additional columns on an institution’s project plan:

- Progress Indicator: A color indicator depicting task status:
  - Blue: Task is complete.
  - Green: Task is in progress.
  - Yellow: The task’s estimated completion date has passed, but there is minimal risk the task will not be completed in a timely manner.
  - Red: The task’s estimated completion date has passed, and there is significant risk the task will not be completed in a timely manner.

- Predecessors: Tasks that must be completed prior to the current task.

- Planned Start Date, Planned Duration, and Planned End Date: These fields are determined during the onboarding visit at each institution.

- Actual Duration: This is a calculated field based on the Actual Start Date and Actual End Date columns.

- Owner/Lead Assigned: This is the point of contact that the USG Managed Services project team will contact for status of the task. The institution may delegate actual task completion to someone else though.
• Deliverables: This column holds additional information to explain what is expected or to provide clarity for development or design-type items.

• Instructions: If instructions are needed on how to complete a task, they will be included.

• Status: The USG Managed Services project team will update this field based on your updates, as well as information from your biweekly calls.

  o Not Started
  o In Progress
  o Complete
  o Pending Review
  o Pending Response

• Status Notes: This column includes any additional information to explain the indicated status for a task.

SHARING YOUR PROJECT PLAN

Project Managers have the ability to share their project plan with other members of their institution.

• From your open project plan, click the Share button in the upper right corner.

• In the “Invite Collaborators” field, enter the email addresses of those individuals you wish to invite.

• In the “Permissions” dropdown, select the appropriate permission:
  o Editor – can share
  o Editor – cannot share
  o Viewer

• The “Subject” line contains the name of the sheet you are sharing along with the permission you selected.
• Enter a message to be sent with the email so that the individual knows why you are sharing this with them.
• Select the Share Sheet button.

• Smartsheet emails the individuals with the invitations.

**ATTACHMENTS**

Attachments can be attached to a line (task) within your project plan.

• Attach an item:
  o On the row you want to attach an item, hover over the third column to display the paperclip icon (Attach a file to this row).
  o Select the paperclip icon.
- Drag and drop the file or use the Attach button to search for and select the item to attach.

- After attaching all items, select the Close button.

  • View an attachment
  • A paperclip in the third column of a row indicates there is an attachment for that row.
  • Hover over the paperclip to see the attachment names.

- Select the paperclip icon.
Select the file name to download/open the item.

- View all attachments on a Smartsheet
  - To view all attachments for your entire project plan (not just by task), select the paperclip icon in the right toolbar of Smartsheet.

  All attachments will be listed in the Sheet Attachment Summary box.
  - Select a file name to download/open the item.

**LOCKED COLUMNS/ROWS**

If you see a “lock” icon to the left of a column or at the top of a row, that means that column or row is locked and cannot be edited with your permissions.
If you see something that needs to be changed, please contact the USG Managed Services project team (managedservices@usg.edu).

**FREQUENTLY USED KEYBOARD SHORTCUTS IN SMARTEET**

<table>
<thead>
<tr>
<th>PC Shortcut</th>
<th>Mac Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + X</td>
<td>Command + X</td>
<td>Cut</td>
</tr>
<tr>
<td>Ctrl + C</td>
<td>Command + C</td>
<td>Copy</td>
</tr>
<tr>
<td>Ctrl + V</td>
<td>Command + V</td>
<td>Paste</td>
</tr>
<tr>
<td>Ctrl + S</td>
<td>Command + S</td>
<td>Save</td>
</tr>
<tr>
<td>F2</td>
<td>Fn + F2</td>
<td>Enters edit mode on a selected cell.</td>
</tr>
<tr>
<td>Ctrl + Z</td>
<td>Command + Z</td>
<td>Undo the previous action since last save.</td>
</tr>
<tr>
<td>Ctrl + Y</td>
<td>Command + Y</td>
<td>Redo the previous action since last save.</td>
</tr>
<tr>
<td>Ctrl + D</td>
<td>Command + D</td>
<td>Fill down. Useful when a column contains a formula that you want to use in every cell in that column.</td>
</tr>
<tr>
<td>Ctrl + F</td>
<td>Command + F</td>
<td>Find information within a sheet.</td>
</tr>
<tr>
<td>Ctrl + G</td>
<td>Command + G</td>
<td>Display the Go To Row window to navigate to a specific row in the sheet.</td>
</tr>
<tr>
<td>Home</td>
<td>Home</td>
<td>Go to the first cell of the current row.</td>
</tr>
<tr>
<td>End</td>
<td>End</td>
<td>Move to the last cell of the current row.</td>
</tr>
<tr>
<td>Ctrl + Home</td>
<td>Command + Home</td>
<td>Takes you to the top left cell of a sheet.</td>
</tr>
<tr>
<td>Ctrl + End</td>
<td>Command + End</td>
<td>Takes you to the bottom right of a sheet.</td>
</tr>
<tr>
<td>Ctrl + )</td>
<td>Command + )</td>
<td>Indent the row.</td>
</tr>
<tr>
<td>Ctrl + [</td>
<td>Command + [</td>
<td>Outdent the row.</td>
</tr>
<tr>
<td>Ctrl (or ALT) + Enter</td>
<td>Command + Enter</td>
<td>Inserts a carriage return or line break in Text/Number cells</td>
</tr>
<tr>
<td>Alt + 0149</td>
<td>Option + 8</td>
<td>Inserts a bullet point in the cell.</td>
</tr>
<tr>
<td>T</td>
<td>T</td>
<td>Inserts today’s date.</td>
</tr>
<tr>
<td>+n (plus sign and a number)</td>
<td>+n (plus sign and a number)</td>
<td>Enters a date “n” days from today’s date.</td>
</tr>
</tbody>
</table>
### PC Shortcut | Mac Shortcut | Description
--- | --- | ---
-n (minus sign and a number) | -n (minus sign and a number) | Enters a date “n” days before today’s date.

| yes | yes | Yesterday's date |
| tcm | tcm | Tomorrow's date |
| last week | last week | The current date - 7 days |
| next week | next week | The current date +7 days |

| sun | sun | The date corresponding to the day of the week in the current week. |
| mon | mon | For example, if today's date is 7/5/18, typing “mon” will return 7/2/18. |
| tue | tue |
| wed | wed |
| thurs | thurs |
| fri | fri |
| sat | sat |

### ADDITIONAL SMARTSHEET RESOURCES

Smartsheet has many resources to help you learn more about using the tool. Here are three videos that will help you get started with Smartsheet:

- Smartsheet Overview Video ([https://youtu.be/7SKHyDoisx4](https://youtu.be/7SKHyDoisx4))
- Smartsheet Support Resources ([https://www.smartsheet.com/support](https://www.smartsheet.com/support))

Select Help in the upper right corner to access additional information.