



Best Practices and Tools for LSAMP Alliance Data Collection and Management

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IINSPIRE LSAMP Alliance Program Manager

Iowa State University

February 15, 2016

Augustana College

DMACC
DES MOINES AREA
COMMUNITY COLLEGE



DOANE
COLLEGE

EASTERN IOWA COMMUNITY COLLEGES
CLINTON ♦ MUSCATINE ♦ SCOTT

HAWKEYE
COMMUNITY COLLEGE

GRINNELL COLLEGE



IOWA VALLEY
COMMUNITY COLLEGE DISTRICT

IOWA STATE
UNIVERSITY

Kirkwood
COMMUNITY COLLEGE

Little Priest
Tribal College

LUTHER COLLEGE



NEBRASKA
WESLEYAN
UNIVERSITY

THE
UNIVERSITY
OF IOWA

University of
Northern Iowa

UPPER IOWA UNIVERSITY
Established in 1857th

Wartburg
College

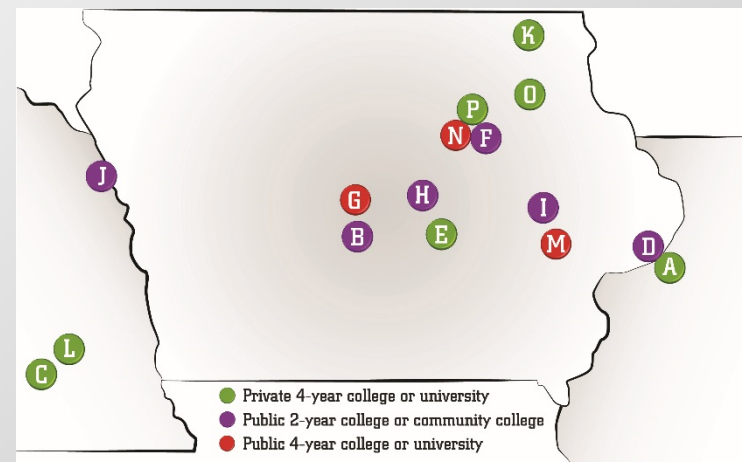
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IINSPIRE LSAMP Alliance



- Augustana College
- Des Moines Area Community College
- Doane University (Nebraska)
- Eastern Iowa Community College District
- Grinnell College
- Hawkeye Community College
- Iowa State University
- Iowa Valley Community College
- Kirkwood Community College
- Little Priest Tribal College (Nebraska)
- Luther College
- Nebraska Wesleyan University
- University of Iowa
- University of Northern Iowa
- Upper Iowa University
- Wartburg College



Management Challenges



- WebAMP data is limited and data entry is done looking back to the previous year (data is not current).
- Gathering data across 16 institutions of varying institutional types.
- Tracking student progress between institutions in a timely manner (i.e. transfer students).
- Tracking students beyond graduation.
- Tracking student retention across 16 institutions of varying institutional types.
- “Type 1” and “Type 2” definition is unclear.



SmartSheet Introduction



Proposal Development

- Grants Hub
- Campus director feedback
- Value to manage large-scale projects better, more efficiently.



Using SmartSheet



How we are using SmartSheet for our program:

- Collaboration & General Project Management
- Annual Reporting
- Student Database & Evaluation
- Mentor Database
- Budget Management
- Online Applications
 - Research, conference travel, and research supplies funding, application for research programs (RISE^{UP}), and event registrations.



SmartSheet Features



- Private Workspaces
- Share worksheets or workspaces
- Email request sent directly from platform
- Send Update Requests
- Reminders
- Notifications
- Templates
- Create Webforms
- Run Reports
- Export information into Excel, PDF, etc.
- Integration with other platforms, such as DocuSign, Box, etc.



Project Management



Action Items List

- Keeps track of tasks each campus director needs to complete
- Reminders are set-up to notify directors of approaching deadlines
- Comments section used to provide instructions
- Documents are uploaded to share with the directors and directors upload completed tasks
- Serves as a second document repository.

Information Requested by College		College/University	Contact Name 1	Contact Name 2	Tentative Due Date	Received
Augustana College						
1	Student Experience Model - Review & Update		Jeffrey Ratliff-Crain		06/03/16	<input type="checkbox"/>
2	Impact Report Dissemination Plan		Jeffrey Ratliff-Crain		06/31/16	<input type="checkbox"/>
3	UG Research Certification Worksheet		Jeffrey Ratliff-Crain		06/03/16	<input type="checkbox"/>
4	Implementing Components of the UGRC Worksheet		Jeffrey Ratliff-Crain		06/03/16	<input type="checkbox"/>
Des Moines Area Community College						
5	Student Experience Model - Review & Update		Karl Hensen		06/03/16	<input type="checkbox"/>
6	Impact Report Dissemination Plan		Karl Hensen		05/31/16	<input type="checkbox"/>
7	UG Research Certification Worksheet		Karl Hensen		06/03/16	<input type="checkbox"/>
8	Implementing Components of the UGRC Worksheet		Karl Hensen		06/03/16	<input type="checkbox"/>
Doane College						
9	Student Experience Model - Review & Update		Shamin Sikich		06/03/16	<input type="checkbox"/>
10	Impact Report Dissemination Plan		Shamin Sikich		05/31/16	<input type="checkbox"/>
11	UG Research Certification Worksheet		Shamin Sikich		06/03/16	<input checked="" type="checkbox"/>
12	Implementing Components of the UGRC Worksheet		Shamin Sikich		06/03/16	<input type="checkbox"/>
Eastern Iowa Community College						
13	Student Experience Model - Review & Update		Brian Ritter		06/03/16	<input type="checkbox"/>
14	Impact Report Dissemination Plan		Brian Ritter		06/31/16	<input type="checkbox"/>
15	UG Research Certification Worksheet		Brian Ritter		06/03/16	<input checked="" type="checkbox"/>
16	Implementing Components of the UGRC Worksheet		Brian Ritter		06/03/16	<input type="checkbox"/>
Grinnell College						
17	Student Experience Model - Review & Update		Jim Swartz		06/03/16	<input type="checkbox"/>
18	Impact Report Dissemination Plan		Jim Swartz		05/31/16	<input type="checkbox"/>
19	UG Research Certification Worksheet		Jim Swartz		06/03/16	<input type="checkbox"/>
20	Implementing Components of the UGRC Worksheet		Jim Swartz		06/03/16	<input type="checkbox"/>



Webforms & Worksheets



RISE UP Summer 2016 Application

Research Innovation in Science Enrichment - University Program

Please have the following application materials prepared before completing this application.

- 1) Personal Statement
- 2) Resume
- 3) Unofficial Transcript
- 4) Letter of Recommendation

Application Deadline: April 15, 2016

Questions?
Contact Derrick Rollins, drollins@

I. APPLICANT INFORMATION

First Name *

Middle Initial

Last Name *

Street Address *

City, State, Zip *

Form 6: Additional Annual Reporting Information

Institution Name

I. Additional Activities Information

Training & Professional Development Activities *
LIST any training or professional development associated with IINSPIRE LSAMP on your campus.

NOTE: If you have reported a professional development event as an activity (form 1), you can just reference this here.

NSF INSTRUCTIONS: Describe opportunities for training and professional development provided to anyone who worked on the project or anyone who was involved in the activities supported by the project. "Training" activities are those in which individuals with advanced professional skills and experience assist others in attaining greater proficiency. For example, summarize the contributions to the research and teaching skills and experience of those who have worked on the project, including undergraduate students, graduate students, post-docs, college faculty, and K-12 teachers. If your project supported postdoctoral researchers, then you must include a summary of the mentoring activities conducted. Training activities may include, for example, courses or one-on-one work with a mentor. "Professional development" activities result in increased knowledge or skill in one's area of expertise and may include workshops, conferences, seminars, study groups, and individual study. Include participation in conferences, workshops, and seminars not listed under major activities.

NOTE: Since training and development are a focus of this project, your response here may be a sentence or two that refer to activities described above.

Disseminated (shared) Activities & Results *
LIST how you disseminated (shared) activities or results with others.

NSF INSTRUCTIONS: Describe how the results have been disseminated to communities of interest. Include any outreach activities that have been undertaken to reach members of communities who are not usually aware of the activities, for the

Annual Reporting: Materials Status							
Products							
Impacts							
2015-16 Activities							
Form 2: Student Demographics (Reporting)							
Form 2: Student Demographics (Reporting)							
Action Items							
Information Requested by College							
	College/University	Contact Name 1	Contact Name 2	Tentative Due Date	Received		
1	Augustana College						
2	Student Experience Model - Review & Update	Jeffrey Ratliff-Crain		06/03/16			
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5	Implementing Components of the UGRC Worksheet	Jeffrey Ratliff-Crain		06/03/16			
6							
7							
8	Des Moines Area Community College						
9	Student Experience Model - Review & Update	Kari Hensen		06/03/16			
10	Impact Report Dissemination Plan	Kari Hensen		05/31/16			
11	UG Research Certification Worksheet	Kari Hensen		06/03/16			
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14	Doane College						
15	Student Experience Model - Review & Update	Shamin Sikich		06/03/16			
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19							
20	Eastern Iowa Community College						
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27	Student Experience Model - Review & Update	Jim Swartz		06/03/16			
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30	Implementing Components of the UGRC Worksheet	Jim Swartz		06/03/16			



Annual Reporting: Before



Old Method:

- Collected a series of forms from each campus
 - Students: One form for each student
 - Faculty mentors: One form for each mentor
 - Activities: One form for each activity
 - Additional Reporting Information
- Evaluator collected the information and entered each item into WebAMP
- Program Manager (ME) used the forms to develop the annual report narrative
- Challenges:
 - Laborious, tedious for all involved.
 - Campus directors often failed to follow protocol, resulting in more work at the end of the year.
 - Tried to use Sharepoint, but often encountered log-in issues for external users.

Form 2: INSPIRE Type I Student Demographic Information

The purpose of this form is to gather basic student information from students who receive direct INSPIRE LSAMP funding (Type I Students). This information is required by the National Science Foundation as a condition of funding.

There are two sections to the form. Section 1 is used to collect activity related information. It should be pre-filled by the Campus Director or agent before the form is given to students to complete. Section 2 is used to gather information about student characteristics. It should generally be completed by the student, but can be completed by the Campus Director or agent if needed.

Section 1: Should be pre-filled by Campus Director or agent

Student's Name:
 First: _____ Middle Initial: _____ Last: _____
 Attending Institution: _____
 Activity Title (for which student receives funding): _____
 Institutional Host for Activity (if different from attending institution): _____

Form 1: INSPIRE LSAMP Activities

1. Activity Title: Fall Welcome LSAMP Get-Together
 Target: ☐ Students ☐ Faculty ☒ Students & Faculty

2. Time Period: ☒ Academic Year Only ☐ Summer Only ☐ Calendar Year

3. Campus Director: Douglas Mupasiri

4. Coordinator 1 (Optional): Latricia Hyllon

5. INSPIRE Program Objective(s) (Select all that apply):
☐ Community-Based and Student Recruiting ☐ Bridge Programs and Transitions
☐ Faculty Engagement and Inclusive Pedagogy ☒ Undergraduate Student Research and Training
☐ Mentor Training ☐ Institutional Commitments Assessment and Evaluation
☐ Student Professional Development ☐ Curriculum/Course Approaches

6. Primary Activity Category (Select only one from all options provided):

Teaching <input type="checkbox"/> Curriculum Reform/Courses <input type="checkbox"/> Curriculum Mod of Degree Requirements <input type="checkbox"/> Curriculum/Other <input type="checkbox"/> Faculty Enrichment/Seminars <input type="checkbox"/> Faculty Enrichment/Workshops <input type="checkbox"/> Faculty Enrichment/Visiting Appointments <input type="checkbox"/> Faculty Enrichment/Other Service <input type="checkbox"/> Mentoring/Peer <input checked="" type="checkbox"/> Mentoring/Faculty <input type="checkbox"/> Mentoring/Industry <input type="checkbox"/> Mentoring/Other	<input type="checkbox"/> Recruitment/Recruiters <input type="checkbox"/> Recruitment/Material Development <input type="checkbox"/> Recruitment/Other <input type="checkbox"/> Academic Counseling/All	Research <input type="checkbox"/> Assistantships/On-Site <input type="checkbox"/> Assistantships/Off-Site <input type="checkbox"/> Assistantships/Other <input type="checkbox"/> Research Pedagogy Courses/All <input type="checkbox"/> Research Seminars/All <input checked="" type="checkbox"/> Special Techniques Training/All <input type="checkbox"/> Other <input type="checkbox"/> Environmental Improvement/Field Trips <input type="checkbox"/> Environmental Improvement/Social Events <input type="checkbox"/> Special Academic Support/Tutoring <input type="checkbox"/> Special Academic Support/Seminars
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Annual Reporting: After



Converted some of the forms into SmartSheet webforms:

- Student Demographic Information
- Additional Reporting Information
- Team (Participant) Information

Converting the remaining forms using SmartSheet

- Mentor Database (Faculty Demographics)
- Activities Information

IINSPIRE LSAMP Student Demographics

Instructions:
The purpose of this form is to gather basic undergraduate student information from students who received direct IINSPIRE LSAMP funding (Type I Students). This information is required by the National Science Foundation as a condition of funding.
If you are currently enrolled at an IINSPIRE LSAMP alliance institution and you are receiving funding or have received funding through the program, please complete the following questions.

First Name *

Middle Initial

Last Name *

College/University *

University/College E-mail *

LinkedIn Site (required) *

Are you a US Citizen, US National, or Permanent Resident? *

☐ Yes
☐ No

Semesters/ Dates of Participation *

Please mark which semesters/terms you participated in IINSPIRE LSAMP activities.
Check all that apply

☐ Summer Term 2015
☐ Fall Term 2015
☐ Winter Term 2015-16
☐ Spring Term 2016



Student Database: Before

- Prior to SmartSheet, we created a student database in CyPoint. Unfortunately log-in issues made it difficult for external users to access it and update student information.
- The information collected from the annual reporting, forms, IINSPIRE LSAMP research funding application, and other various forms had to manually entered.
- Required constant updating.
- Campus directors rarely accessed the site. If it wasn't because of log-in issues, it was because they didn't like using CyPoint.



Form 2: IINSPIRE Type I Student Demographic Information

The purpose of this form is to gather basic student information from students who receive direct IINSPIRE LSAMP funding (Type I Students). This information is required by the National Science Foundation as a condition of funding.

There are two sections to the form. Section 1 is used to collect activity related information. It should be pre-filled by the Campus Director or agent before the form is given to students to complete. Section 2 is used to gather information about student characteristics. It should generally be completed by the student, but can be completed by the Campus Director or agent if needed.

Section 1: Should be pre-filled by Campus Director or agent

Student's Name:
 First: _____ Middle Initial: _____ Last: _____

Attending Institution: _____

Activity Title (for which student receives funding): _____

Institutional Host for Activity (if different from attending institution): _____

Semester/ Date of Participation: _____

CyPoint

BROWSE ITEMS LIST

Home Augustana DMACC Doane ECCO Grinnell Hawkeye CC ISU IVCCD Kirkwood CC LTP

Student Members

new item or edit this list

All Items Find an item

Program Status	Last Name	First Name	College/University	Major	Graduation Date	Class
Student Member	Quintero	Marlie	Iowa State University	Chemical Engineering	2013	Undergraduate Student
Student Member	Johnson	Steven	Iowa State University	Industrial and Manufacturing Engineering	May 11, 2013	Senior
Student Member	Cofax	Carnelle	Iowa State University	Higher Education and Student Affairs	2013	Graduate Student
Student Member	Alkajji-Anderson	Comfort	Iowa State University	Education	2013	Graduate Student
Student Member	Reichelt	Tammy	Iowa State University	Higher Education	2014	Graduate Student
Student Member	Miranda	Freddy	Iowa State University	Education		Graduate Student
Student Member	Olson	Allison	Iowa State University	Educational Leadership and Policy Studies		Graduate Student
Student Member	Lodge	Alexander	University of Iowa	Chemistry	2013	Graduate Student
Student Member	Kollasch	Korey	Iowa State University	Education	2014	Graduate Student
Student Member	Greiner	Kayla	Iowa State University	Agricultural Communications	2014	Undergraduate Student

EDIT LINKS Site Contacts



Student Database: Now



- Each campus is provided with their own workspace in SmartSheet.
- A student database worksheet has been created for each college/university
- Campus directors or coordinators use the webforms feature to request the information for the students.
- Campus directors can send update requests to student for particular information.

IINSPIRE LSAMP Student Demographics

Instructions:
The purpose of this form is to gather basic undergraduate student information from students who received direct IINSPIRE LSAMP funding (Type I Students). This information is required by the National Science Foundation as a condition of funding.

If you are currently enrolled at an IINSPIRE LSAMP alliance institution and you are receiving funding or have received funding through the program, please complete the following questions.

First Name *

Middle Initial

Last Name *

College/University *

University/College E-mail *

LinkedIn Site (required) *

Are you a US Citizen, US National, or Permanent Resident? *

Student's First Name	Student's Middle Initial	Student's Last Name	Home Institution	Semesters/ Dates of Participation	Summer Semester 2015	Fall Semester 2015	Winter Semester 2015-16	Spring Semester 2016	Major/Anticipated Major	Class Standing
Jacob	D	Torres	Augustana College	Check all that apply	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Biological Sciences	Senior
Rosa	A	De La Torre	Augustana College	Check all that apply	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Biological Sciences	Senior
Lizeth	I	Tamayo	Augustana College	Check all that apply	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Physical Sciences	Senior
Amber	E	Were	Augustana College	Check all that apply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Physical Sciences	Junior
Carol		Garcia	Augustana College	Check all that apply	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Biological Sciences	Freshman
Christian		Garcia	Augustana College	Check all that apply	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Biological Sciences	Sophomore
Markus	D	Simmons	Augustana College	Check all that apply	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Biological Sciences	Sophomore
McKenna	P. A.	Burns	Augustana College	Check all that apply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Biological Sciences	Junior



Student Database: Now



- Campus directors or the alliance office updates the students' participation in events through out the year.
- Campus directors receive notifications when the student(s) complete the webform.
- Everyone (evaluator, program manager, campus directors, coordinators) have access to student information in real-time.
- Student records can be updated to include other attachments, such as poster PDFs, articles, publications, etc.
- Evaluator can run reports anytime during the year.
- Information received through the research funding application or other applications can be copied into the database.



Mentor Database



- Similar set-up to student database.
- Mentors are asked to complete a webform when they start mentoring our students
- Includes questions about mentor training history
- Inquires about graduate students who will also serve as mentors to the students.



Budget Management



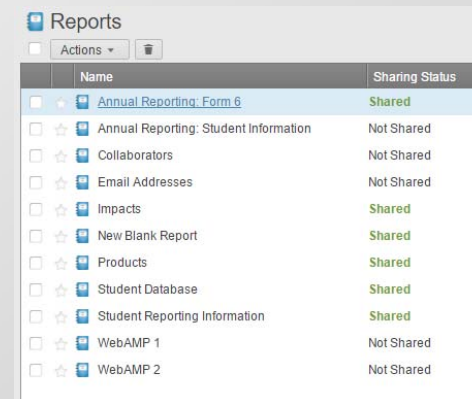
- Budget worksheet created for each campus
- Allows directors to view the amount of funding available in their subcontract
 - Verify accounting departments submitted billing forms
- Technical reports will be uploaded to each worksheet 3x/yr when invoices are also due.



Evaluation and Reports



- Campus directors are required to update data 3x/year, at the same time technical reports are due.
- Allows evaluator to run current reports
- Report features allows evaluator to choose which data they want to review, analyze, etc.
 - Information from across all 16 workspaces can be pulled into one report.
 - Automatically updates the report if a worksheet is updated.
 - Information can be exported to Excel
 - Anticipate substantial time savings for WebAMP reporting.



	Sheet Name	First_M	APC_M	Last_Name	Middle_Initial	First_Name	Gender	Race	Disability_Status	Discipline	Class	Graduated (Year)
1	INSPIRE LSAMP Student Information	1999	49	Hyacinthe		Hyacinthe	Male	Check all that apply	Check all that apply	Engineering	Sophomore	
2	INSPIRE LSAMP Student Information	1999	49	Reem		Alkhail	Female	Check all that apply	Check all that apply	Engineering	Sophomore	
3	INSPIRE LSAMP Student Information	1999	49	Barbel		Stanley	Male	Check all that apply	Check all that apply	Engineering	Senior	
4	INSPIRE LSAMP Student Information	1999	49	Smith		Rami	Female	Check all that apply	Check all that apply	Biological Sciences	Sophomore	
5	INSPIRE LSAMP Student Information	1999	49	Thomas	L	Amanda	Female	Check all that apply	Check all that apply	Engineering	Senior	
6	INSPIRE LSAMP Student Information	1999	49	Odesanya		Achez	Male	Check all that apply	Check all that apply	Engineering	Junior	
7	INSPIRE LSAMP Student Information	1999	49	Webber		Tara	Female	Check all that apply	Check all that apply	Physical Sciences	Senior	Yes
8	INSPIRE LSAMP Student Information	1999	49	Tingle		Michael	Male	Check all that apply	Check all that apply	Engineering	Junior	
9	INSPIRE LSAMP Student Information	1999	49	Mendez		Solena	Female	Check all that apply	Check all that apply	Non-STEM	Junior	
10	INSPIRE LSAMP Student Information	1999	49	Becquer		Jordan	Male	Check all that apply	Check all that apply	Engineering	Sophomore	Yes
11	INSPIRE LSAMP Student Information	1999	49	Jackson		Courtnee	Female	Check all that apply	Check all that apply	Engineering	Freshman	
12	INSPIRE LSAMP Student Information	1999	49	Lorenzana		Eduardo	Male	Check all that apply	Check all that apply	Engineering	Freshman	
13	INSPIRE LSAMP Student Information	1999	49	Flowers	A	Darrell	Male	Check all that apply	Check all that apply	Engineering	Sophomore	
14	INSPIRE LSAMP Student Information	1999	49	Granados		Norma	Female	Check all that apply	Check all that apply	Physical Sciences	Junior	
15	INSPIRE LSAMP Student Information	1999	49	Ryan	J	Brad	Male	Check all that apply	Check all that apply	Engineering	Junior	
16	INSPIRE LSAMP Student Information	1999	49	Odoro-Nomkyine		Kofi	Male	Check all that apply	Check all that apply	Physical Sciences	Freshman	
17	INSPIRE LSAMP Student Information	1999	49	Mikias		Nebiyu	Male	Check all that apply	Check all that apply	Engineering	Senior	
18	INSPIRE LSAMP Student Information	1999	49	Vanhorn		Calina	Female	Check all that apply	Check all that apply	Engineering	Sophomore	
19	INSPIRE LSAMP Student Information	1999	49	James		Myra	Female	Check all that apply	Check all that apply	Engineering	Junior	
20	INSPIRE LSAMP Student Information	1999	49	Collazo Martinez	D	Ana	Female	Check all that apply	Check all that apply	Biological Sciences	Senior	
21	INSPIRE LSAMP Student Information			Omar	Mohamed	Abdoul	Male	Check all that apply	Check all that apply	Agriculture Sciences	Freshman	
22	INSPIRE LSAMP Student Information			Slade	R	Alevis	Female	Check all that apply	Check all that apply	Engineering	Junior	
23	INSPIRE LSAMP Student Information	1999	49	Fritts	S	Andre	Male	Check all that apply	Check all that apply	Engineering	Senior	
24	INSPIRE LSAMP Student Information	1999	49	Hernandez	A	Christian	Male	Check all that apply	Check all that apply	Engineering	Sophomore	
25	INSPIRE LSAMP Student Information	1999	49	Hernandez	I	Christopher	Male	Check all that apply	Check all that apply	Engineering	Sophomore	
26	INSPIRE LSAMP Student Information	1999	49	Rubio Delgado		Enrique	Male	Check all that apply	Check all that apply	Engineering	Junior	
27	INSPIRE LSAMP Student Information	1999	49	Galegos	K	Enma	Female	Check all that apply	Check all that apply	Engineering Technology	Junior	
28	INSPIRE LSAMP Student Information	1999	49	Williams	N	Kearnah	Female	Check all that apply	Check all that apply	Interdisciplinary Studie	Senior	
29	INSPIRE LSAMP Student Information	1999	49	Diallo	Said	Mouhamad	Male	Check all that apply	Check all that apply	Engineering	Junior	
30	INSPIRE LSAMP Student Information	1999	49	Taylor	M	Omar	Male	Check all that apply	Check all that apply	Engineering	Junior	
31	INSPIRE LSAMP Student Information			Chinyima		William	Male	Check all that apply	Check all that apply	Biological Sciences	Junior	
32	INSPIRE LSAMP Student Information	1999	49	Amencou		Soukaina	Female	Check all that apply	Check all that apply	Non-STEM	CommCel	



Evaluation and Reports

- Example report ran for WebAMP reporting information.

WebAMP_SmartSheet_15-16 - Excel

Mitchell, Danielle R [G COL]

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1															
2	Fice_Id	Last_Name	Middle_Initial	First_Name	Gender	Ethnicity	Race								
3							Race_Amer_Ind	Race_Alaska_Native	Race_Asian	Race_Black	Race_Native_Haw	Race_White	Race_Not_Reported	Race_Other	Mobility/Orthopedi
4	1869				Female	Hispanic or Latino				TRUE				TRUE	
5	1869				Female	NOT Hispanic or Latino				TRUE					
6	1869				Male	NOT Hispanic or Latino	TRUE			TRUE		TRUE			
7	1869				Male	Hispanic or Latino						TRUE			
8	1869				Male	Hispanic or Latino						TRUE			

Templates



- Created using an existing worksheet
- Ideal for creating multiple copies of the same worksheet
- Saves the webform as well
- Templates can be shared with anyone, including individuals outside the alliance or organization.

Z_Templates

Actions [icon] [icon]

	Name	Sharing
<input type="checkbox"/>	☆ [icon] Event Registration	Workspace
<input type="checkbox"/>	☆ [icon] Form 1 Activities	Workspace
<input type="checkbox"/>	☆ [icon] Form 2 Student Demographic Information_v2	Workspace
<input type="checkbox"/>	☆ [icon] Form 2: Student Demographic Information_v1	Workspace
<input type="checkbox"/>	☆ [icon] Form 3 Faculty Demographics	Workspace
<input type="checkbox"/>	☆ [icon] Form 6 Additional Information	Workspace
<input type="checkbox"/>	☆ [icon] IINSPIRE LSAMP Student Information	Workspace
<input type="checkbox"/>	☆ [icon] Participant (Team) Information	Workspace
<input type="checkbox"/>	☆ [icon] Project Budget_II	Workspace
<input type="checkbox"/>	☆ [icon] Research supplies App	Workspace
<input type="checkbox"/>	☆ [icon] Student Exit Survey	Workspace

Form 6 Additional Information (preview)

	Institution Name	Training & Professional Dev	Disseminated Activities	Journals	Conf. Presentations	Other Publications	Other Products	Partner Orgs	Proposals	Other Colla
1										
2										
3										
4										
5										
6										
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27										

Cancel Use Template

Danielle Mitchell 09/24/16



Using SmartSheet Tutorials

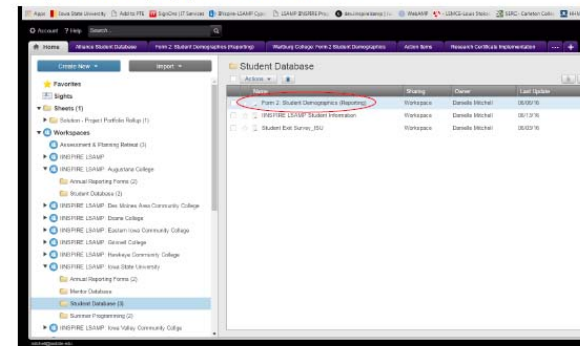


- To help our campus directors navigate SmartSheet
- Developed instructions or how-to guides
- Willing to share tutorials upon request
- We also have a copy of the training manual from SmartSheet Academy.

USING SMARTSHEET WEBFORMS

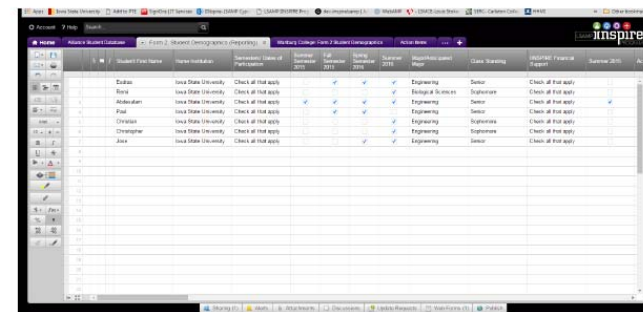
ACCESSING A SMARTSHEET WEBFORM

To access a SmartSheet webform, start by opening the worksheet associated with your webform. For reporting student demographic information, we will be using the "Form 2: Student Demographics (Reporting)" worksheet. To open the worksheet, simply double-click on the file name.



THE WORKSHEET

Your worksheet will look similar to the one below. As students complete the survey, their answers will automatically fill each of the cells. The worksheet functions similar to an Excel file. You can scroll to the left/right or up/down to view student information. Columns can also be hidden from view.



SmartSheet Plans



Basic Plan:

Designed for personal use
Access to 10 worksheets max

Team Plan: Minimum 3 Licenses

\$149/License/Year
50 Sheets/License
Ability to run [Reports](#)
NO Access to our Dashboard Feature - called Smartsheet [SIGHTS](#)

Business Plan: Minimum 3 Licenses

\$249/license/Year
100 Sheets/License
Ability to run [Reports](#)
Full Access to our Dashboard Feature - called Smartsheet [SIGHTS](#)
Access to [ODBC Connector](#)
Includes [Skype integration](#) (if you have 0365 or Skype Online)

Enterprise Plan:

Custom quotes based on volume tiers
All features of Business Plan + [Suite of IT Governance Tools for Central Plan Management](#)

