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Track Your Key Initiatives with Project Portfolio Reporting

Robin Sherwood
Senior Director of Product Management, Product

#SmartsheetENGAGE

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What is Your Portfolio Of?

Photo Credits - Dave Catchpole

BT ArtBox celebrating 25 years of ChildLine
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A good process will be based on data that people enter naturally to do their jobs, not on the data that the project management office forces them to enter to support the PMO's reporting and tracking needs.

Photo Credit Bruce Fingerhood

What Step in What Lifecycle?

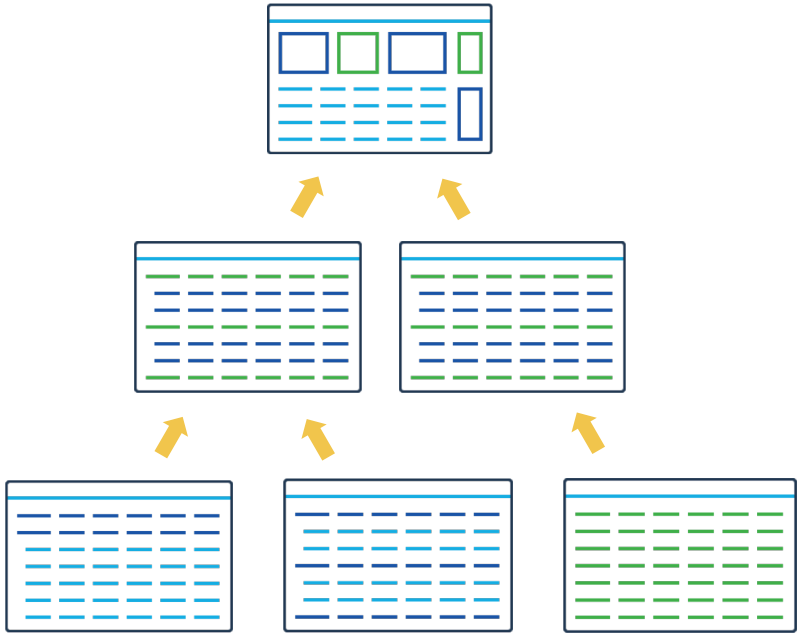
Get Phone Box → Choose Theme → Buy Supplies → Paint → Deploy

Who is Reviewing the Portfolio

- What information do decision makers need?
- Should we start it?
  - How much will it cost
  - How long will it take?
  - How does it compare to the other options we have?
- Can we help it?
- Should we kill it?
- Or just where are we at?

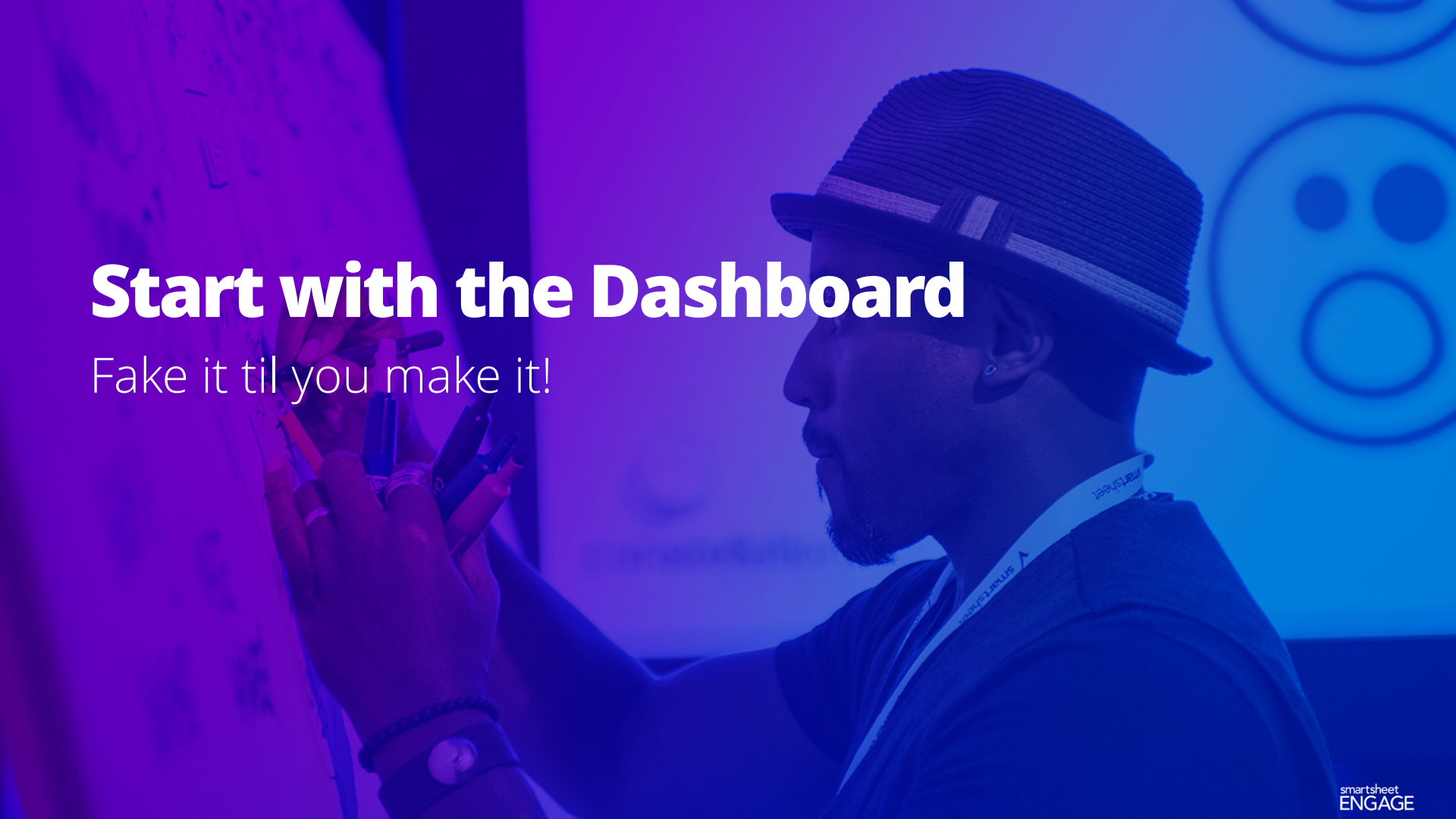
Goals

- Create portfolio views relevant to your business
- Learn how to do it in Smartsheet
- Scale/automate the process
- Preview new features that will expand your options



Start with the Dashboard

Fake it til you make it!



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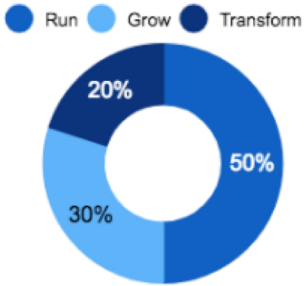
MBFCORP dry run

Help | Notifications

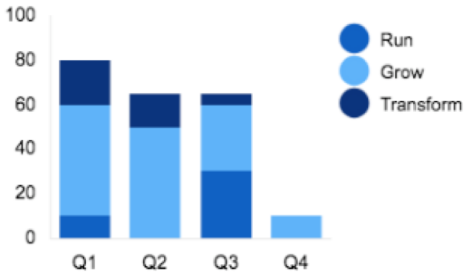
Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard

Edit | Share

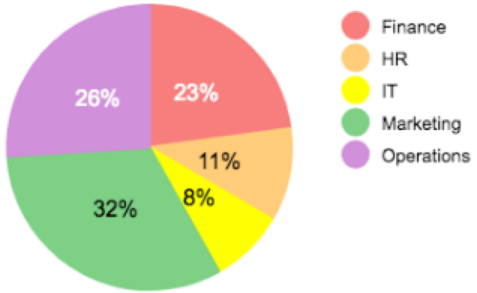
Investment Class



Dashboard Metrics



Department



2103
Baseline Work

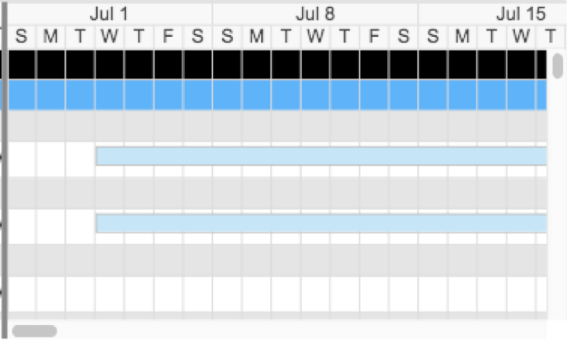
2814
Planned Work

745
Actual Work

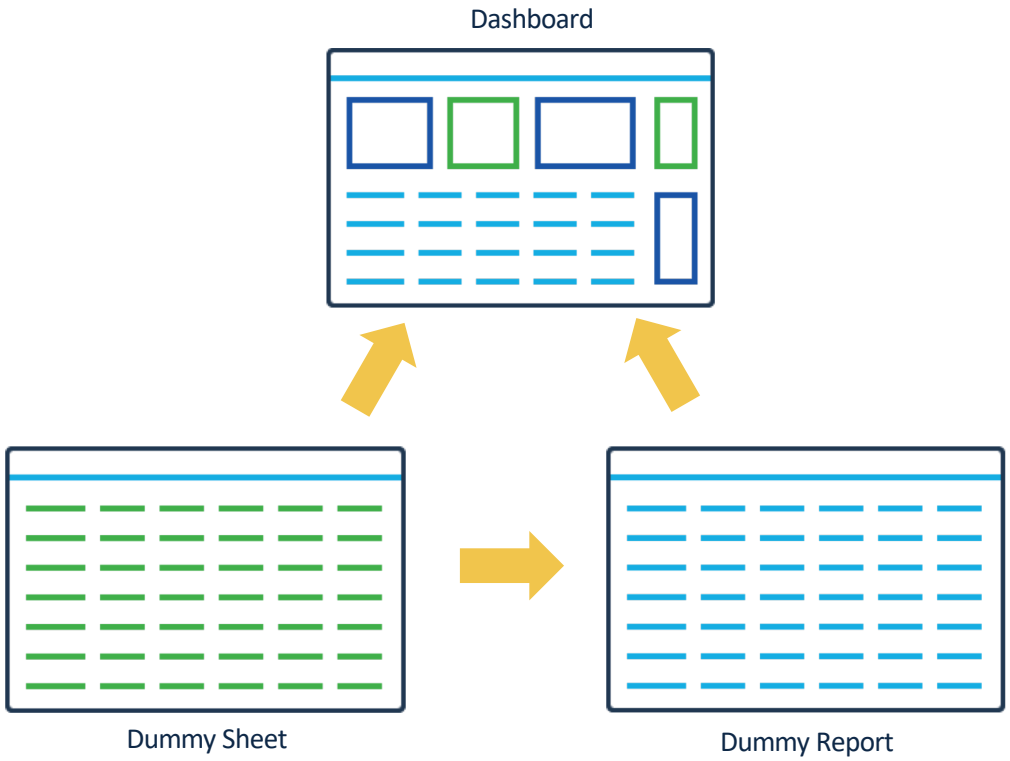
2069
Remaining Work

IT PMO Scorecard

Primary	Project Status	Project Stage	Status Headline	YTD Actual	YTD Budget	YTD Variance	Start Date	End Date	Du
Grand Total	**35**			**$25,688,773**	**$34,510,958**	-26%			
Application Developm	**7**			**$4,847,901**	**$9,304,202**	-48%			
Cost Savings	**1**			**$493,200**	**$646,000**	-24%			
Wind Energy Farm	●	Approved	Project is currently on tra	$493,200	$646,000	-24%	07/04/18	10/09/18	02/
Growth	**1**			**$2,217,000**	**$3,781,000**	-41%			
Oracle 12c Update	●	Live	Project is currently on tra	$2,217,000	$3,781,000	-41%	07/04/18	04/06/19	04/
Innovation	**1**			**$58,101**	**$285,201**	-80%			
Program Interface for S	●	Live		$58,101	$285,201	-80%	08/06/18	12/13/19	09/



Prototype Your Dashboard



Use Dummy Data

smartsheet | Booth | Help | Notifications

Home | Personal Portal | Dashboard Prototype | Dashboard Metrics | Selection Scorecard | IT PMO Scorecard | Customer ER Sheet | ER Counts

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

Primary Column	Category	Remaining Work	Baseline Work	Actual Work	Planned Work
		Q1	Q2	Q3	Q4
Run	50	10		30	
Grow	30	50	50	30	10
Transform	20	20	15	5	
Finance	$705,000				
HR	$325,000	2069	2103	745	2814
IT	$260,000				
Marketing	$990,000				
Operations	$800,000				

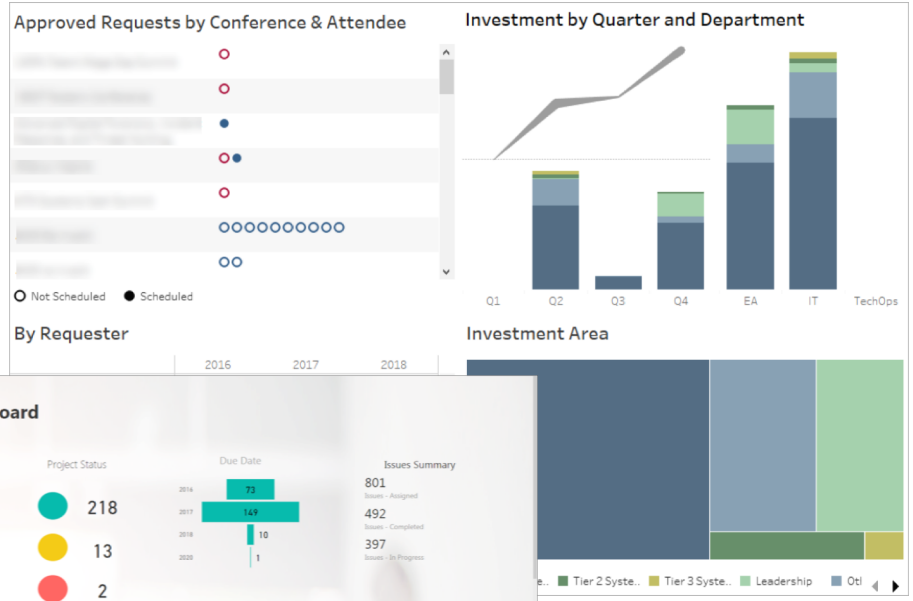
Upgrade to a "Metric Sheet"

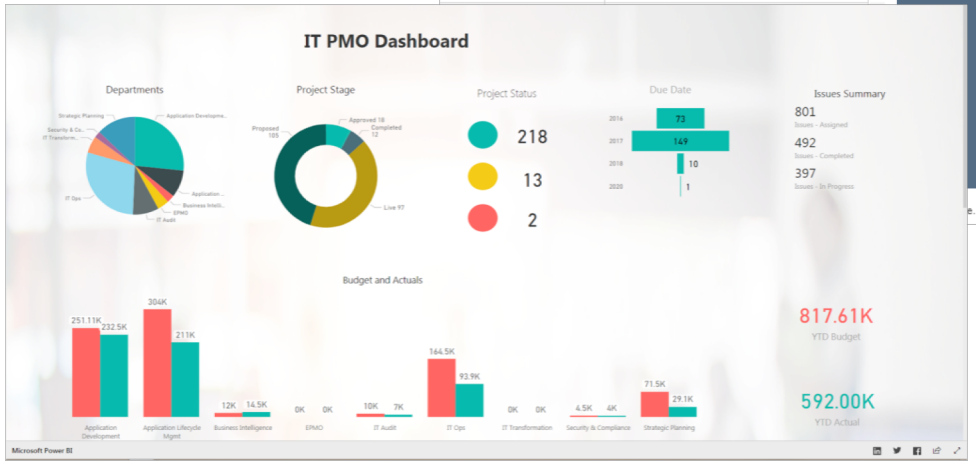
Utilize Cross-sheet Formulas

Primary Column	Remaining	Comlpete	Unpointed	In Progress	In Review	Ready For Test	In Test	Column8
		Completed	**Un Pointed**	In Progress	In Review	Ready for Test	In Test	
Sprint 7		43	4	0	0	0	0	
Sprint 8		47	9	0	0	0	0	
Sprint 9		62	4	0	0	0	0	
Sprint 10		=SUMIFS({Story Points}, {Type}, "Story", {Status}, "Complete", {Sprint}, $[Primary Column]5)						
Sprint Backlog	56		1					
Project Backlog	83		2					
Total Remaining	199							

Integrations

- Web Data Connector
- Web content widget
  - Power BI
  - Tableau





Insights

Fake it 'til you make it!

Practices

- Start with a Dashboard and a Sheet
- Layout major components quickly
- The dashboard guides your templates

Key Learnings

- Simple is better
- Colors are lost when you change data sources, save that for later
- Leverage Cross sheet formulas

Map to your real data

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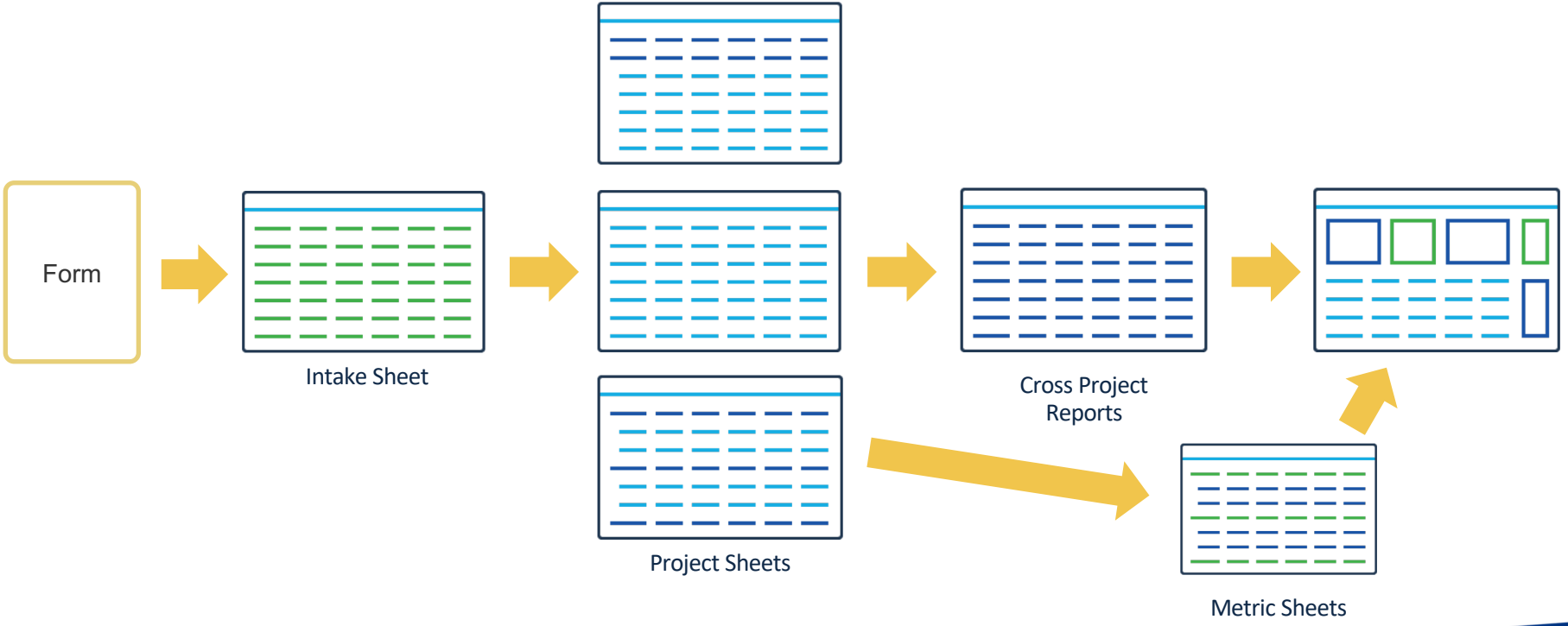
Where will data live?



Example 1

Dual Entry

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dry run

Help

Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard

File | Alerts & Actions | Forms

Share

Card View | Filter | Level 1 | View by Stage

Uncategorized (0)

Research (3)

Gantt Zoom
Proj-0004
Large (7-15 wks)

Column Header Help/tool tip
Proj-0002
Small (1day-2 wks)

Localization: Korean, Simplified Chinese, Traditi...
Proj-0006
Med (2-8 wks)

Requirements & Design (4)

Conditional Form Field support
Proj-0012
Large (7-15 wks)

Activity Log API Change
Proj-0003
Small (1day-2 wks)

Date Column format enhancements
Proj-0005
Med (2-8 wks)

Sheet Summary Panel Support
Proj-0011
Med (2-8 wks)

Dev+QA (2)

UX Refresh Phase 3 - Navigation
ProjectID
Proj-0010
Size
XL (14+ wks)
Customer Value
LOE
Add Subtask

Sheet Summary Formula Support
Proj-0009
Med (2-8 wks)

Deployed to Production (1)

Sheet Summary (EAP)
ProjectID
Proj-0007
Size
XL (14+ wks)
Customer Value
LOE
Add Subtask

Launched to Customers (2)

Multi-Assignee/Multi-Contact
Proj-0008
XL (14+ wks)

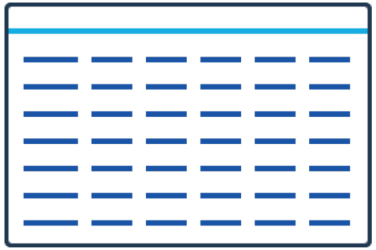
Iframe Widget
Proj-0001
Small (1day-2 wks)

Example 1

Dual entry sheet

Project Sheets

Portfolio Sheet



MBFCORP

dry run

Help

Notifications

Home | CIO Dashboard | Consulting Pipeline | Retail Store Operations Dashboard | IT Request Management | IT PMO Scorecard | Order Pipeline | Jira Tasks

Create New | Import

- Favorites
- Dashboards/Portals
- Sheets (36)
- Workspaces
  - __Robin's Demo Account - Accelerator for IT
    - !MBF_StartHere (2)
    - !MBF Partner Integrations
    - !MBF Smartsheet (1)
    - !MBF Smartsheet Solution Center
    - Analyst Demo
    - Human Resources
    - IT & Operations
      - 1 - Demo Reports
        - 1 - Dual Entry (2)
        - 2 - Summary Row Demo
        - 3 - Master Sheet Report
        - 4 - Profile Report
      - Application Develpment (1)
        - API & Webhooks
        - Core

1 - Dual Entry

Actions

Sharing

Name	Sharing	Owner	L...
Backlog	Workspace	Robin Sherwood	6 mi
IT Portfolio Scorecard	Workspace	Robin Sherwood	57 r

Workspace Shared To

Robin Sherwood
Owner

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Help Notifications

Home | CIO Dashboard | Consulting Pipeline | Retail Store Operations Dashboard | IT Request Management | IT PMO Scorecard | Order Pipeline | Backlog

File Alerts & Actions Forms Share

Grid View Filter Off Arial 10

	ProjectID	Backlog Item Name	Stage	Description	Size	Project Tweet
1	Proj-0001	Iframe Widget	Launched to Custome	Allow select web content to be embe	Small (1day-2 wks)	
2	Proj-0002	Column Header Help/tool tip	Research	Add subdialogue - edit column prope	Small (1day-2 wks)	
3	Proj-0003	Activity Log API Change	Requirements & Desi	Update errors, instructional message	Small (1day-2 wks)	
4	Proj-0004	Gantt Zoom	Research	Support for zooming into sub-day tas	Large (7-15 wks)	
5	Proj-0005	Date Column format enhancements	Requirements & Desi	Set additional format options in the c	Med (2-8 wks)	
6	Proj-0006	Localization: Korean, Simplified Chinese	Research	Additional app and help support	Med (2-8 wks)	
7	Proj-0007	Sheet Summary (EAP)	Deployed to Producti	Preview release of data only	XL (14+ wks)	
8	Proj-0008	Multi-Assignee/Multi-Contact	Launched to Custome	Multi-select contact columns across	XL (14+ wks)	
9	Proj-0009	Sheet Summary Formula Support	Dev+QA	Summary/Grid Formulas with Cross	Med (2-8 wks)	
10	Proj-0010	UX Refresh Phase 3 - Navigation	Dev+QA	Left navigation and direct links	XL (14+ wks)	
11	Proj-0011	Sheet Summary Panel Support	Requirements & Desi	Summary info in slideout panel	Med (2-8 wks)	
12	Proj-0012	Conditional Form Field support	Requirements & Desi	Display form fields based on answer	Large (7-15 wks)	

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Help Notifications

Home | CIO Dashboard | Consulting Pipeline | Retail Store Operations Dashboard | IT Request Management | IT PMO Scorecard | Order Pipeline | Backlog

File Alerts & Actions Forms Share

Grid View Ready For Dev Tracker Arial 10

	ProjectID	Backlog Item Name	Stage	Description	Size	Project Tweet
4	Proj-0004	Gantt Zoom	Research	Support for zooming into sub-day tas	Large (7-15 wks)	
7	Proj-0007	Sheet Summary (EAP)	Deployed to Producti	Preview release of data only	XL (14+ wks)	
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12	Proj-0012	Conditional Form Field support	Requirements & Desi	Display form fields based on answer	Large (7-15 wks)	

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Help | Notifications

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Grid View | Ready For Dev Tracker | Arial | 10

	ProjectID	Backlog Item Name	Stage	Description	Size	Project Tweet
4	Proj-0004	Gantt Zoom	Research	Support for zooming into sub-day tas	Large (7-15 wks)	
7		ry (EAP)	Deployed to Producti	Preview release of data only	XL (14+ wks)	
8		/Multi-Contact	Launched to Custome	Multi-select contact columns across	XL (14+ wks)	
10		hase 3 - Navigation	Dev+QA	Left navigation and direct links	XL (14+ wks)	
12		rm Field support	Requirements & Desi	Display form fields based on answer	Large (7-15 wks)	
13						
14						
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26						
27						
28						

- Insert 5 Rows Above (Ctrl + I)
- Insert 5 Rows Below
- Cut (⌘ + X)
- Copy (⌘ + C)
- Paste (⌘ + V)
- Delete
- Sort Rows...
- Lock
- Move to Another Sheet...
- Copy to Another Sheet...
- View Row in Card View
- Attachments...
- Comments...
- Set Reminder...
- Send...
- Send Update Request...
- Properties...

COUNT: 25

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Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	ProjectID	Backlog Item Name	Stage	Description	Size	Custo… Value	LOE	Project Tweet
1	Proj-0004	Gantt Zoom	Research	Support for zooming into sub-day tas	Large (7-15 wks)	♥♥♡♡♡	👤👤👤	
2	Proj-0007	Sheet Summary (EAP)	Deployed to P	Preview release of data only	XL (14+ wks)	♥♥♡♡♡	👤👤👤	
3	Proj-0008	Multi-Assignee/Multi-Contact	Launched to C	Multi-select contact columns across	XL (14+ wks)	♥♥♥♥♥	👤👤👤	
4	Proj-0010	UX Refresh Phase 3 - Navigation	Dev+QA	Left navigation and direct links	XL (14+ wks)	♥♥♥♡♡	👤👤👤	
5	Proj-0012	Conditional Form Field support	Requirements	Display form fields based on answer	Large (7-15 wks)	♥♥♥♡♡	👤👤	
6	Proj-0001	Iframe Widget	Launched to C	Allow select web content to be embe	Small (1day-2 wks)	♥♥♥♥♡	👤	
7	Proj-0002	Column Header Help/tool tip	Research	Add subdialogue - edit column prope	Small (1day-2 wks)	♥♥♡♡♡	👤👤	
8	Proj-0003	Activity Log API Change	Requirements	Update errors, instructional message	Small (1day-2 wks)	♥♡♡♡♡	👤	
9	Proj-0005	Date Column format enhancements	Requirements	Set additional format options in the c	Med (2-8 wks)	♥♥♥♥♡	👤👤	
10	Proj-0006	Localization: Korean, Simplified Chinese	Research	Additional app and help support	Med (2-8 wks)	♥♥♡♡♡	👤👤	
11	Proj-0009	Sheet Summary Formula Support	Dev+QA	Summary/Grid Formulas with Cross	Med (2-8 wks)	♥♥♥♡♡	👤👤	
12	Proj-0011	Sheet Summary Panel Support	Requirements	Summary info in slideout panel	Med (2-8 wks)	♥♥♡♡♡	👤👤	
13								
14								
15								
16								
17								
18								

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dry run

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Dev+QA (2)

UX Refresh Phase 3 - Navigation
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Launched to Customers (2)

Multi-Assignee/Multi-Contact
Proj-0008
XL (14+ wks)

Iframe Widget
Proj-0001
Small (1day-2 wks)

Use a Sheet!

Pros

- Easy to create, flexible
- Leverage views, formulas, dependencies
- Saved filters
- Conditional formatting
- Setup reminders/updates and notifications

Cons

- Dual entry in multiple sheets
- Layout may be overwhelming
- May not be able to sort
- May not want to share all the details

Example 2

Summary Row Reports

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Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Project Score Card

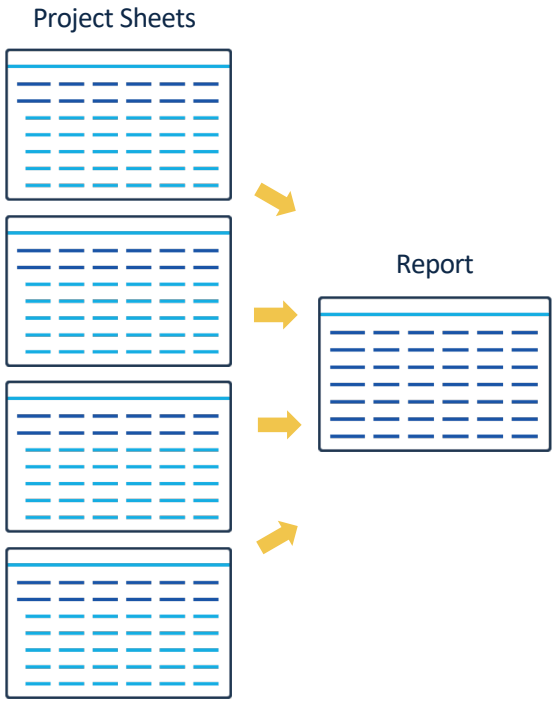
File Share

Grid View Report Builder

	Sheet Name	Primary	Project Owner	Category	Budget Health	Project Status	Start Date	End Date
1	Project 4	Marketo Plan migration	Robin Sherwood	Application Maintenanc	↑	●	09/19/18	09/19/18
2	Project 1	Exchange Upgrage	Phillip Gockel	Application Maintenanc	↓	●	09/19/18	09/19/18
3	Project 2	Jira Cloud Deployment	Alex Ebright	Operations	↘	●	09/19/18	09/19/18
4	Project 3	Service Now Roll-out	Alex Ebright	IT Services	↗	●	09/19/18	09/19/18
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								

Example 2

Summary Row Reports



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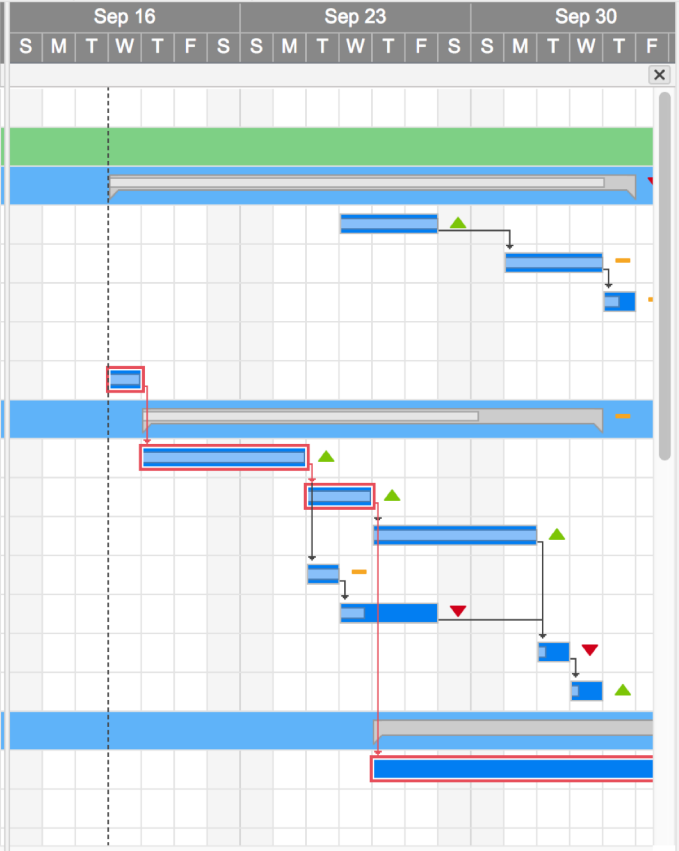
Help | Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | ISO27001 Compliance Checklist (Example)

File | Alerts & Actions | Forms | Share

Gantt View | Filter | Arial | 10

	Pregress	Task Name	Owner	Start Date	End Date	Trend
1		Summary				
14		Azure Migration	Robin Sherwoo			
15	94%	Plan		09/19/18	10/04/18	
16	100%	Build Team	Alex Ebright	09/26/18	09/28/18	
17	100%	Develop Deployment Plan	Alex Ebright	10/01/18	10/03/18	
18	50%	Determine Budget	Alex Ebright	10/04/18	10/04/18	
19	50%	Get Exec Sponsor	Kit Unger			
20	100%	Kickoff Meeting	Kit Unger	09/19/18	09/19/18	
21	73%	Assess		09/20/18	10/03/18	
22	100%	Network Infrastructure	Steve Brown	09/20/18	09/24/18	
23	100%	Application Inventory	Robin Sherwoc	09/25/18	09/26/18	
24	100%	Sign-up requirements	Steve Brown	09/27/18	10/01/18	
25	100%	IT Controls in cloud app	Steve Brown	09/25/18	09/25/18	
26	25%	Migration Toolkit	Steve Brown	09/26/18	09/28/18	
27	25%	Browser Needs	Steve Brown	10/02/18	10/02/18	
28	25%	Hardware needs	Steve Brown	10/03/18	10/03/18	
29	0%	Remediate		09/27/18	12/14/18	
30	0%	[enter issue to address]	Daniel Medvec	09/27/18	10/15/18	
31	0%	[enter issue to address]	Daniel Medvec	10/16/18	11/15/18	
	0%	[enter issue to address]	Daniel Medvec	11/16/18	12/14/18	



MBFCORP dry run

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File | Alerts & Actions | Forms | Share

Gantt View | Filter | Arial | 10

	Progress	Task Name	Owner	Start Date	End Date	Trend
1		Summary				
2	Project Name	Azure Migration				
3	Project Owner	Robin Sherwood				
4	Department	Application Development				
5	Objective	Migration from AWS to Az				
6	Output	XVC-01 on Azure				
7	Success Metric	Migration Completed on T				
8	Path To Green					
9	Start Date	7/15/18				
10	End Date	10/13/18				
11	Project Status	Green				
12	Status Headline					
13	Executive Commen					
14		Azure Migration	Robin Sherwoo			
15	94%	Plan		09/19/18	10/04/18	
16	100%	Build Team	Alex Ebright	09/26/18	09/28/18	
17	100%	Develop Deployment Plan	Alex Ebright	10/01/18	10/03/18	
18	50%	Determine Budget	Alex Ebright	10/04/18	10/04/18	
19	50%	Get Exec Sponsor	Kit Unger			
20	100%	Kickoff Meeting	Kit Unger	09/19/18	09/19/18	

Sep 16 (S M T W T F S) | Sep 23 (S M T W T F S) | Sep 30 (S M T W T F)

Project Name	Project Owner	Category	Objective	Path to Green	Due date
Azure Migration	Robin Sherwood	Application Developme	Migration from AWS to		03/06/17

fx =Task2

MBFCORP dry run

Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Project Score Card

File Share

Grid View Report Builder

	Sheet Name	Primary	Project Owner	Category	Budget Health	Project Status	Start Date	End Date
1	Project 4	Marketo Plan migration	Robin Sherwood	Application Maintenanc	↑	●	09/19/18	09/19/18
2	Project 1	Exchange Upgrage	Phillip Gockel	Application Maintenanc	↓	●	09/19/18	09/19/18
3	Project 2	Jira Cloud Deployment	Alex Ebright	Operations	↘	●	09/19/18	09/19/18
4	Project 3	Service Now Roll-out	Alex Ebright	IT Services	↗	●	09/19/18	09/19/18
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								

Summary Rows and Reports

Pros

- Formulas for aggregation
- Columns selection & order
- Sorting in the report
- Embeddable in dashboards
- Publish only report data

Cons

- No card view
- No dependencies
- No independent formatting
- No editing values from reports

Example 3

Master Sheet Reports

smartsheet ENGAGE

MBFCORP Azure

Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Cell Link Summary Sheet for Standard IT Projects

File Alerts & Actions Forms Share

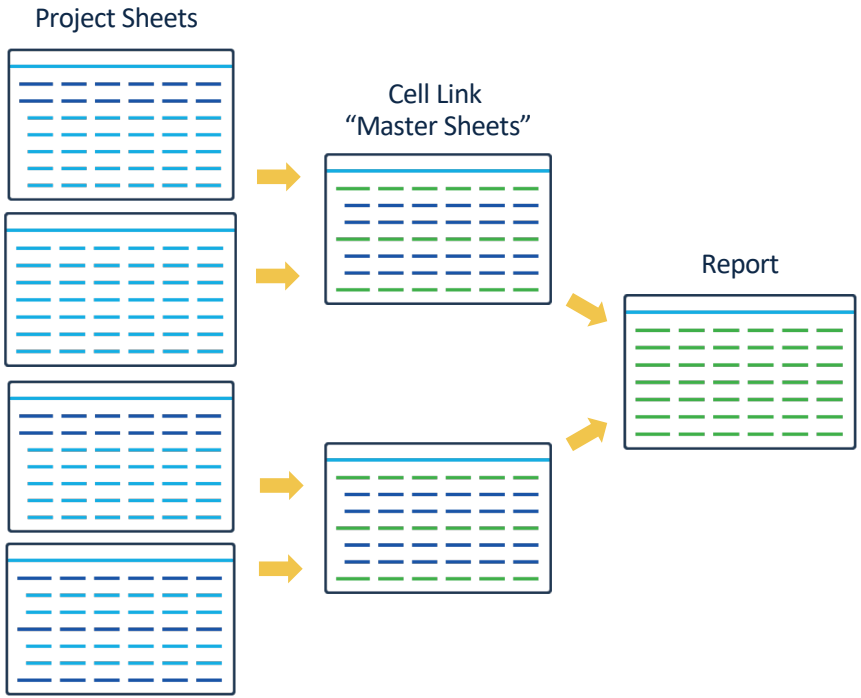
Grid View Filter Arial 10

Link in from : Azure Migration

	Project Name	Project Status	Project Stage	YTD Actual	YTD Budget	Department	Output	Success Metric	Objective	Projec
1	Summary									
46	Salesforce Connect		Live	$8,000	$15,000	Applications Deve	Live System	On time go live	Sync Salesforc	Sar
47	EXP03 Upgrade		Live	$3,000	$5,500	Application Maint	Live System	On time go live	Upgrade EXP0	Sar
48	2017 Strategic Plan		Live	$350	$500	Strategic Planning	2017 plan	2017 plan signed off by	Build IT Roadm	Sar
49	Azure Migration		Live	$10,000	$10,000	Application Devel	XVC-01 on Azure	Migration Completed on	Migration from	Sar
50	SMT04			0,000	$60,000	Applications Deve	Live SMT system	On time go live	Accept Card Pa	Sar
51	Office 365 Migration		Live	$90,000	$125,000	Application Maint	All users live on C	On time go live	Move from Offic	Sar
52	Office 365 Security Plan		Live	$4,000	$15,000	Strategic Planning	Security review d	Security document revie	Security review	Sar
53	SWIFT-01		Live	$0	$0	Applications Deve	SWIFT implemen	On time go live	Implement SWI	Sar
54	Oracle 12c Migration		Live	$4,500	$5,000	Business Intellige	Database Migrate	On time completion	Upgrade Prod D	Sar
55	PCI Audit		Live	$4,000	$4,500	Security & Compl	Success complet	On time completion of a	Conduct PCI Au	Sar
56	SOX Compliance		Approved	$0	$0	Security & Compl	Compliance done	On time completion	Complete SOX	Sar
57	Skype Rollout		In Progress	$40,000	$90,000	Mkt	TBD	TBD	Available to eve	Raji
58	Office 365 Optimization		Live	$6,000	$5,000	Applications Deve	Live Office 365 S	On time completion	Optimize Office	Sar
59	SAP Upgrade		Approved	$6,000	$18,000	Applications Deve	Live System	On time completion	Streamline sup	Sar
60	Service Now		Live	$64,000	$50,000	Application Maint	Live System	On time completion	Upgrade to Gal	Sar
61	Cloud Migration Strategy		Live	$4,000	$3,000	Strategic Planning	Strategy Docume	Strategy Document Sigr	Build Cloud Mig	Sar
62	DB Optimization		Live	$10,000	$7,000	Business Intellige	DB Optimized	Response times reduce	Reduce respon	Sar
63	OneDrive rollout		Live	$45,000	$107,500	IT operations	OneDrive Busine	TBD	Retire SharePo	Sar
64	Office 365 Skye Integration		Live	$2,000	$7,500	Application Maint	Live System	On time completion	Implement Skyp	Sar

Example 3

Master Sheet Reports



MBFCORP Azure

Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Azure Migration

File Alerts & Actions Forms Share

Grid View Filter Arial 8

	At R...	Status	Task Name	Status Headline	Start Date	End Date	Done	Risk Level	Path To Green	Assigned
1			Summary				A			
2			Project Name	Azure Migration						
3			Project Own	Sarfraz Ali						
4			Department	Application D pment			A			
5			Objective	Migration from A o Azu			A			
6			Output	XVC-01 on Azure			A			
7			Success Metric	Migration Completed on Ti			A			
8			Path To Green				A			
9			Due Date	03/06/17			A			
10			Start Date							
11			End Date							
12			Project Stage	Live			A			
13			Budget Plan	$10,000.00			A			
14			Budget Actual				A			
15			Project Status	Green			A			
16			Status Headline				A			
17			Executive Comments				A			
18			Task Name	Status	Start Date	End Date	Done?	Risk Level	Path To Green	Assigr
19	☑	Green	Azure Migration							
	☑		Planning							<<Ente

Link out to: Cell Link Summary Sheet for Standard IT Projects

MBFCORP Azure Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Cell Link Summary Sheet for Standard IT Projects

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	Project Name	Project Status	Project Stage	YTD Actual	YTD Budget	Department	Output	Success Metric	Objective	Projec
1	Summary									
46	Salesforce Connect		Live	$8,000	$15,000	Applications Deve	Live System	On time go live	Sync Salesforc	Sar
47	EXP03 Upgrade		Live	$3,000	$5,500	Application Maint	Live System	On time go live	Upgrade EXP0	Sar
48	2017 Strategic Plan		Live	$350	$500	Strategic Planning	2017 plan	2017 plan signed off by	Build IT Roadm	Sar
49	Azure Migration		Live	$10,000	$10,000	Application Devel	XVC-01 on Azure	Migration Completed on	Migration from	Sar
50	SMT04		Live	$30,000	$60,000	Applications Deve	Live SMT system	On time go live	Accept Card Pa	Sar
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52	Office 365 Security Plan		Live	$4,000	$15,000	Strategic Planning	Security review d	Security document revie	Security review	Sar
53	SWIFT-01		Live	$0	$0	Applications Deve	SWIFT implemen	On time go live	Implement SWI	Sar
54	Oracle 12c Migration		Live	$4,500	$5,000	Business Intellige	Database Migrate	On time completion	Upgrade Prod D	Sar
55	PCI Audit		Live	$4,000	$4,500	Security & Compl	Success complet	On time completion of a	Conduct PCI Au	Sar
56	SOX Compliance		Approved	$0	$0	Security & Compl	Compliance done	On time completion	Complete SOX	Sar
57	Skype Rollout		In Progress	$40,000	$90,000	Mkt	TBD	TBD	Available to eve	Raji
58	Office 365 Optimization		Live	$6,000	$5,000	Applications Deve	Live Office 365 S	On time completion	Optimize Office	Sar
59	SAP Upgrade		Approved	$6,000	$18,000	Applications Deve	Live System	On time completion	Streamline sup	Sar
60	Service Now		Live	$64,000	$50,000	Application Maint	Live System	On time completion	Upgrade to Gal	Sar
61	Cloud Migration Strategy		Live	$4,000	$3,000	Strategic Planning	Strategy Docume	Strategy Document Sigr	Build Cloud Mig	Sar
62	DB Optimization		Live	$10,000	$7,000	Business Intellige	DB Optimized	Response times reduce	Reduce respon	Sar
63	OneDrive rollout		Live	$45,000	$107,500	IT operations	OneDrive Busine	TBD	Retire SharePo	Sar
64	Office 365 Skye Integration		Live	$2,000	$7,500	Application Maint	Live System	On time completion	Implement Skyp	Sar

MBFCORP Azure Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Cell Link Summary Sheet for Standard IT Projects

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	Project Name	Project Status	Project Stage	YTD Actual	YTD Budget	Department	Output	Success Metric	Objective	Projec
1	Summary									
2	Overall Portfolio Status									
3	Total IT Budget	$1,000,000								
4	App Dev Budget	$400,000								
5	App Maintenance Budget	$400,000								
6	Strategic Planning Budget	$100,000								
7	Systems Analysis Budget	$100,000								
8	App Development Employees	22								
9	App Maintenance Employees	16								
10	System Analysis Employees	12								
11	Strategic Planning Employees	2								
12	BI Analysts	1								
13	Security Analysts	1								
14	Total Approved Projects	2								
15	Total Live Projects	17								
16	Total In Progress Projects	1								
17	Total Closed Projects	0								
18	Total Projects	20								
19	Total Live Projects	17								
20	Salesforce Connect		Live	$8,000	$15,000	Applications Deve	Live System	On time go live	Sync Salesforc	Sar

Master Sheet Reports

Pros

- Aggregate more complete information e.g. issues, risks, locations, etc.
- Independent formatting
- Formula support
- Benefits of option 2

Cons

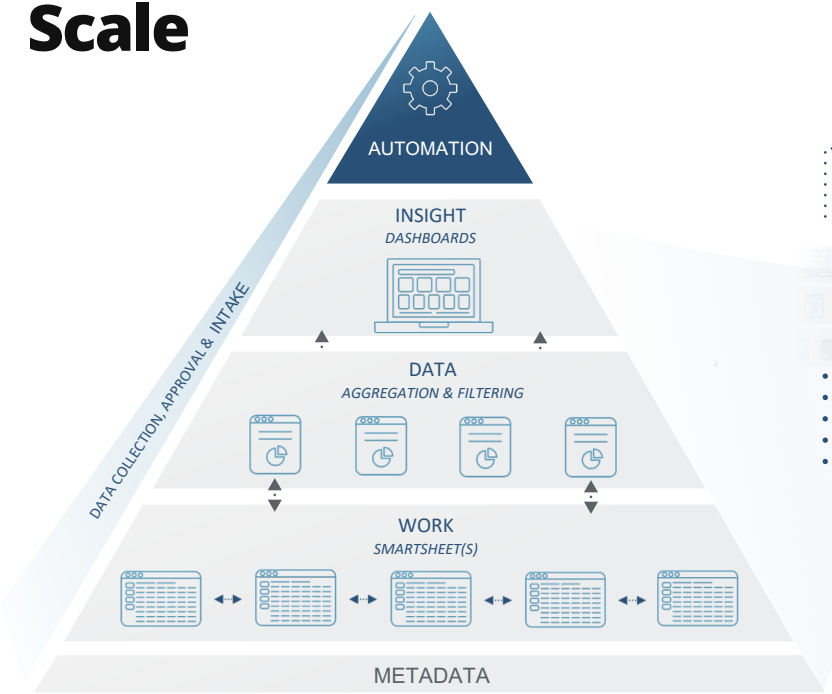
- No editing values from reports
- Heavy use of cell links
- Cell links are templatized

Scaling Your Process

Automate the details

smartsheet ENGAGE

Smartsheet Control Center - Reporting and Dashboards at Scale



Scaling Your Processes

AGGREGATE DASHBOARDS & REPORTS

GLOBAL UPDATES

Demand Management → Project Initiation → Team Collaboration → Reporting

Coming Soon

Sheet summary and reporting

smartsheet ENGAGE

Sheet Summary Fields

smartsheet ENGAGE

What is it?

- A new set of custom fields about a sheet
- Supports the same data types as the sheet
- Supports ”save as new” and templates
- Shows in search results
- Future: will interact with the sheet via formulas

smartsheet Search... Help Notifications Account

Home | API - Backlog | Integrations - Backlog | Product Pipeline | Azure Migration - Issue Tracker | Azure Migration - Project Plan

Views | Indent | Format | Arial | 10 | Numbers | Insert

	At Risk?	Status	Task Name	Status Headline	Start Date	End Date	Done	Risk Level	Path To Gree
1			Summary						
2			Project Name	Azure Migration					
3			Project Owner	Alex Bright					
4			Category	Infrastructure					
5			Objective	Migration from AWS to Azu					
6			Output	XVC-01 on Azure					
7			Success Metric	Migration Completed on Ti					
8			Path To Green						
9			Due Date	03/06/17					
10			Start Date				☐		
11			End Date				☐		
12			Project Stage	Live					
13			Budget Plan	100000					
14			Budget Actual						
15			Project Status	Green					
16			Status Headline						
17			Executive Comments						
18			Task Name	Status	Start Date	End Date	Done?	Risk Level	Path To G
19			Azure Migration						

Sharing | Alerts | Attachments | Comments | Update Requests | Forms | Publish | Activity Log | Profile

MBFCORP | Azure | Help | Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Azure Migration

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 8

	At R...	Status	Task Name	Status Headline	Start Date	End Date	Done	Risk Level	Path To Green	Assigned
1			**Summary**				A			
2			Project Name	**Azure Migration**			A			
3			Project Owner	Sarfraz Ali			A			
4			Department	Application Development			A			
5			Objective	Migration from AWS to Azu			A			
6			Output	XVC-01 on Azure			A			
7			Success Metric	Migration Completed on Ti			A			
8			Path To Green				A			
9			Due Date	03/06/17			A			
10			Start Date							
11			End Date							
12			Project Stage	Live			A			
13			Budget Plan	$10,000.00			A			
14			Budget Actual				A			
15			Project Status	Green			A			
16			Status Headline				A			
17			Executive Comments				A			
18			**Task Name**	**Status**	**Start Date**	**End Date**	**Done?**	**Risk Level**	**Path To Green**	**Assigr**
19	☑	Green	**Azure Migration**							
	☑		**Planning**							<<Ente

MBFCORP Azure Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Project 2

File Alerts & Actions Forms Share

Gantt View Filter Arial 10

	Task Name	Duration	Start	Finish	Predecessors
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Sep 16 | Sep 23 | Sep 30 | Oct 7

S M T W T F S S M T W T F S S M T W T F S S M T W T F S

Summary

smartsheet | Search... | Help | Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

	Task Name	Summary Data	Role	Assigned to
1	**Project Summary**			
2	Event Name	SmartCheck		
3	Planned start date	06/15/2018		
4	Planned finish date	08/15/2018		
5	**Project Team**			
6	Project Manager	Graham Pardoe		
7	Primary Stakeholder	Charlotte Standbrooke		
8	**Project Health**			
9	Overall % Complete	90%		
10	Completed Tasks	18		
11	Blocked Tasks	2		
12				
13	**PROJECT PLAN**			
14	**Initial Planning**			
15	Define Event Objective		Event Owner	<CE Owner
16	Define Target Audience		Event Owner	<CE Owner
17	Determine Budget		Event Owner	<CE Owner
	Complete Event Brief		Event Owner	<CE Owner

Sheet Summary

With Sheet Summary, view high-level project info and quickly identify stakeholders, budget, due dates, and more.

Learn about Sheet Summary (2:34)

Use a list of default fields

or

+ Add new field

smartsheet | Search... | Help | Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

New Summary Field

Name

Project Status

Column Type

- Text/Number
- **Contact List...**
- Date
- Duration
- ✓ Dropdown List...
- Checkbox
- Symbols...
- Auto_Number/System...

Values (Type each value on seperate line)

Cancel | OK

Task Name			
Project Summary			
Event Name			
Planned start date			
Planned finish date			
Project Team			
Project Manager			
Primary Stakeholder			
Project Health			
Overall % Complete			
Completed Tasks			
Blocked Tasks			
PROJECT PLAN			
Initial Planning			
Define Event Objective		Event Owner	<CE Owner
Define Target Audience		Event Owner	<CE Owner
Determine Budget		Event Owner	<CE Owner

mary, view high-level project info and quickly
keholders, budget, due dates, and more.

earn about Sheet Summary (2:34)

Use a list of default fields

or

+ Add new field

smartsheet Search... Help Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	Task Name	Summary Data	Role	Assigned to
1	**Project Summary**			
2	Event Name			
3	Planned start date			
4	Planned finish date			
5	**Project Team**			
6	Project Manager	Graham Pardoe		
7	Primary Stakeholder	Charlotte Standbrooke		
8	**Project Health**			
9	Overall % Complete	90%		
10	Completed Tasks	18		
11	Blocked Tasks	2		
12				
13	**PROJECT PLAN**			
14	**Initial Planning**			
15	Define Event Objective		Event Owner	<CE Owner
16	Define Target Audience		Event Owner	<CE Owner
17	Determine Budget		Event Owner	<CE Owner
	Complete Event Brief		Event Owner	<CE Owner

Sheet Summary is setup with default fields

You can add, modify or delete fields as needed. Try reordering the fields as well.

Got It

Sheet Summary

Project Name

Project Description

Project Owner

Budget

Project kickoff date

+ Add new field

smartsheet | Search... | Help | Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

	Task Name	Summary Data	Role	Assigned to
1	**Project Summary**			
2	Event Name	SmartCheck		
3	Planned start date	06/15/2018		
4	Planned finish date	08/15/2018		
5	**Project Team**			
6	Project Manager	Graham Pardoe		
7	Primary Stakeholder	Charlotte Standbrooke		
8	**Project Health**			
9	Overall % Complete	90%		
10	Completed Tasks	18		
11	Blocked Tasks	2		
12				
13	**PROJECT PLAN**			
14	**Initial Planning**			
15	Define Event Objective		Event Owner	<CE Owner
16	Define Target Audience		Event Owner	<CE Owner
17	Determine Budget		Event Owner	<CE Owner
	Complete Event Brief		Event Owner	<CE Owner

Sheet Summary

Project Name

Smartcheck

Project Description

Right panel project

Project Owner

Sasan Ehdaie

Budget f_x

1000

Project kickoff date

06/15/18

+ Add new field

smartsheet

Search...

Help | Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153 | New Sheet

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

	Primary Column	Column2	Column3	Column4	Column5
1					
2	Total Expense	=			
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Sheet Summary

Costs

200

Overhead

50

Planned Start Date

06/15/18

Budget

1000

Project Owner

Sasan Ehdaie

+ Add new field

smartsheet

Search...

Help | Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153 | New Sheet

File | Alerts & Actions | Forms | Share

Grid View | Filter | Arial | 10

	Primary Column	Column2	Column3	Column4	Column5
1					
2	Total Expense	= Costs#			
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Sheet Summary

Costs

200

Overhead

50

Planned Start Date

06/15/18

Budget

1000

Project Owner

Sasan Ehdaie

+ Add new field

smartsheet Search... Help Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153 | New Sheet

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	Primary Column	Column2	Column3	Column4	Column5
1					
2	Total Expense	= Costs# + Overhead# + [Primary Column]6			
3					
4					
5					
6	10				
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Sheet Summary

Costs

200

Overhead

50

Planned Start Date

06/15/18

Budget

1000

Project Owner

Sasan Ehdaie

+ Add new field

smartsheet Search... Help Notifications

Home | Sheet Profile test | New Sheet | Test Dashboard with Contacts | Test contacts in reports | Multi-Assignee Team Backlog - 0153 | New Sheet

File Alerts & Actions Forms Share

Grid View Filter Arial 10

	Primary Column	Column2	Column3	Column4	Column5
1					
2					
3					
4					
5					
6	10				
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Sheet Summary

Costs

200

Overhead

50

Planned Start Date

06/15/18

Budget

1000

Project Owner

Sasan Ehdaie

Remaining Budget

=Budget# - Costs# + [Primary Column]6

+ Add new field

MBFCORP Robin Help Notifications

Home Dashboard

Create New

Favorites

Dashboards/Porta

Sheets (36)

Workspaces

__Robin's Demo Ac

!MBF_StartHere (2

!MBF Partner Integ

!MBF Smartsheet (

!MBF Smartsheet S

Analyst Demo

Human Resources

IT & Operations

1 - Demo Repo

1 - Dual Er

2 - Summa

3 - Master

4 - Profile

Application Dev

API & Web

Core

Shared To

n Sherwood

Search

Robin

Found 1 match after filtering. Clear Filters

Search in:

All Smartsheet

Help Center

Filter By:

Type

- Sheet Names
- Summary Fields
- Rows
- Attachments
- Comments
- Workspaces
- Folders
- Dashboard Names
- Report Names
- Template Names

Location

Last Modified

Results	Type	Location	Last Modified
Project 1	Sheet	IT & Operations > 1 - Demo R	0 minutes ago
Project Owner | **Robin** Sherwood (	Summary field		0 minutes ago

Sheet Profile Reporting

smartsheet ENGAGE

MBFCORP Robin

Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Portfolio Report

File Share

Grid View Report Builder

	Sheet Name	Launch Date	Project Status	Budget Status	Overall Trend	Category	Project Stage	Project Owner	Modified	Modified By
1	Marketo Update	09/18/18				Application Development	In Progress	Dan Arildson	09/20/18 6:19 PM	robin.sherwo
2	Jira Cloud MIgration	09/18/18				Infrastructure	In Progress	Jim O'Farrell	09/20/18 6:19 PM	robin.sherwo
3	Exchange Upgrade	09/18/18				Operations	In Progress	Robin Sherwood	09/20/18 6:20 PM	robin.sherwo
4	Datacenter Move	09/18/18				Infrastructure	Exploratory	Allegra Silcox	09/20/18 6:18 PM	robin.sherwo
5	Azure Migration	09/18/18				Operations	Approved	Sara Liebert	09/20/18 6:21 PM	robin.sherwo
6	ISO Compliance Prep	09/18/18				Security & Compliance	In Progress	Paul Barrett	09/20/18 6:21 PM	robin.sherwo

COUNT: 8 MIN: 09/18/18 MAX: 09/18/18

What is it?

- A new type of report
- A new report builder experience
- Future: will integrate with existing reports for filtering
- Future: will replace the row report builder

MBFCORP Robin

Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | ISO27001 Compliance Checklist (Example)

Create New | Import

- Favorites
- Dashboards/Portals
- Sheets (36)
- Workspaces
  - __Robin's Demo Account - Accelerator for IT
  - !MBF_StartHere (2)
  - !MBF Partner Integrations
  - !MBF Smartsheet (1)
  - !MBF Smartsheet Solution Center
  - Analyst Demo
  - Human Resources
  - IT & Operations
    - 1 - Demo Reports
      - 1 - Dual Entry (2)
      - 2 - Summary Row Demo (7)
      - 3 - Master Sheet Report (4)
      - **4 - Profile Report (2)**
    - Application Develpment (1)
      - API & Webhooks
      - Core

4 - Profile Report

Actions

Name	Sharing	Owner	L...
Project 1	Workspace	Robin Sherwood	0 mi
Project 2	Workspace	Robin Sherwood	09/2

Sharing

Workspace Shared To

Robin Sherwood
Owner

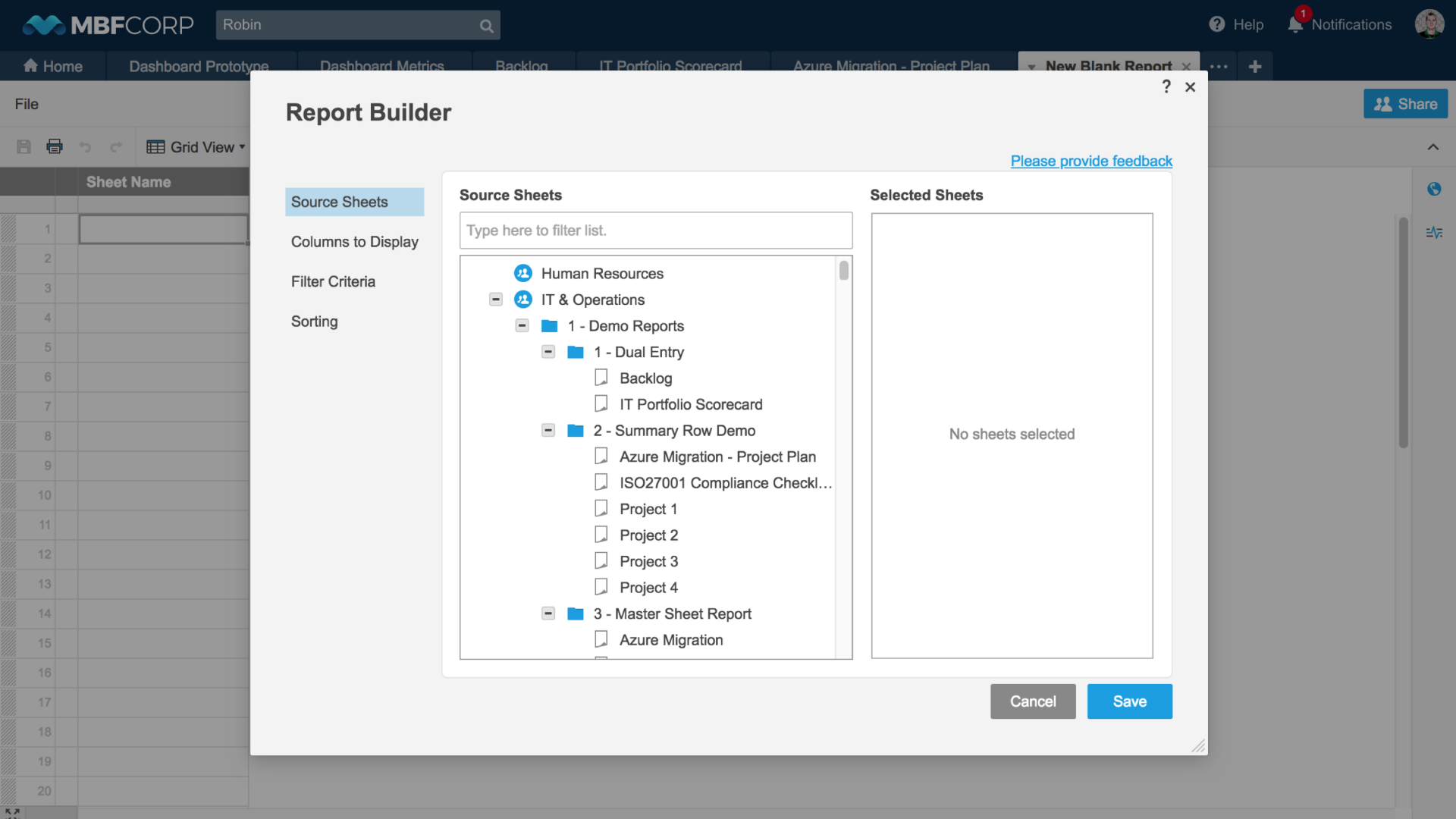
Name Your Report:

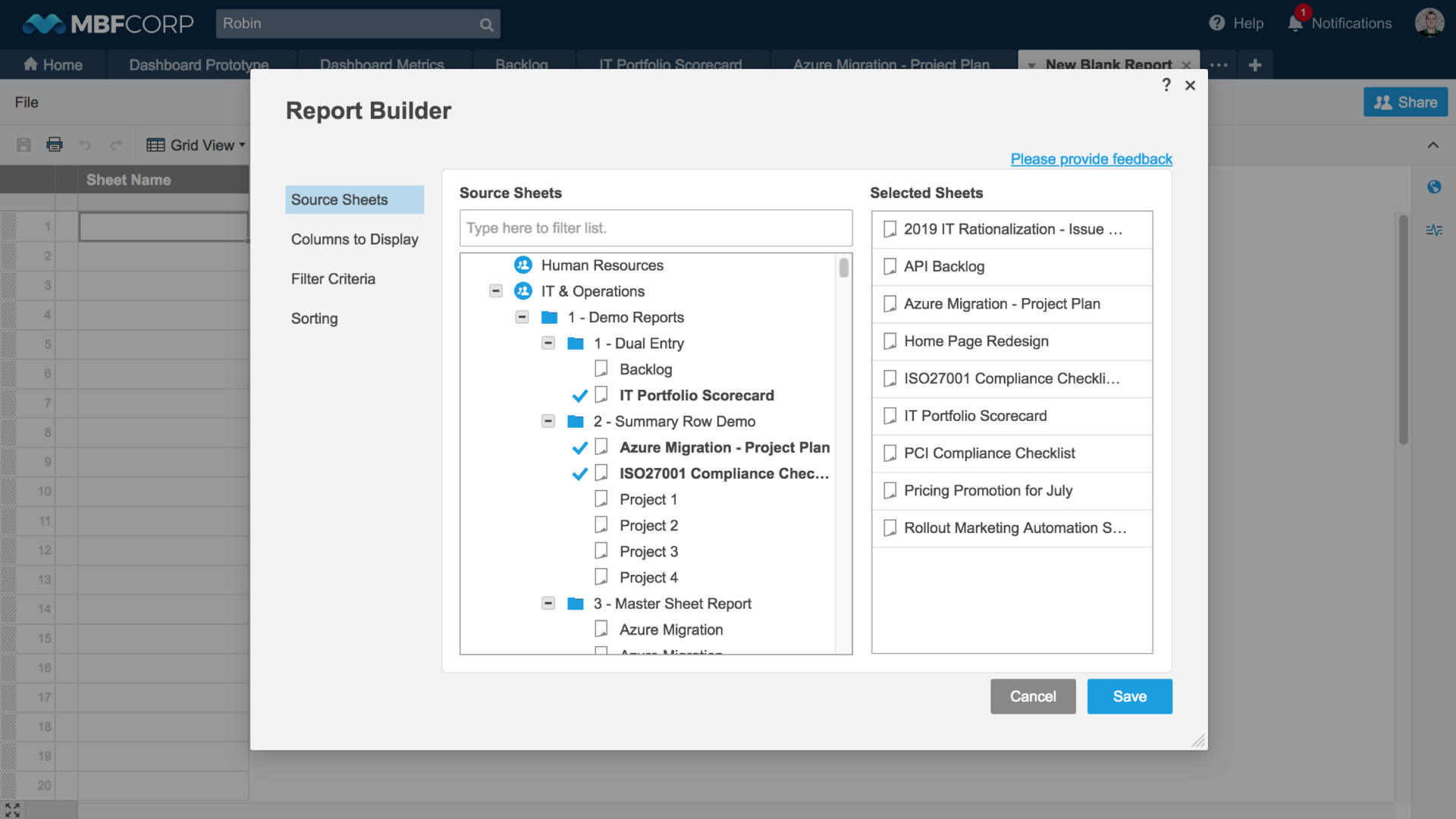
New Blank Report

Row report

Summary report

Cancel | OK


MBFCORP
Robin
Help
Notifications
Home
Dashboard Prototype
Dashboard Metrics
Backlog
IT Portfolio Scorecard
Azure Migration - Project Plan
New Blank Report
File
Share
Grid View
Sheet Name
Report Builder
Please provide feedback
Source Sheets
Columns to Display
Filter Criteria
Sorting
Source Sheets
Type here to filter list.
Human Resources
IT & Operations
1 - Demo Reports
1 - Dual Entry
Backlog
IT Portfolio Scorecard
2 - Summary Row Demo
Azure Migration - Project Plan
ISO27001 Compliance Checkl…
Project 1
Project 2
Project 3
Project 4
3 - Master Sheet Report
Azure Migration
Selected Sheets
No sheets selected
Cancel
Save


MBFCORP
Robin
Help
Notifications
Home
Dashboard Prototype
Dashboard Metrics
Backlog
IT Portfolio Scorecard
Azure Migration - Project Plan
New Blank Report
File
Share
Grid View
Sheet Name
Report Builder
Please provide feedback
Source Sheets
Columns to Display
Filter Criteria
Sorting
Source Sheets
Type here to filter list.
Human Resources
IT & Operations
1 - Demo Reports
1 - Dual Entry
Backlog
IT Portfolio Scorecard
2 - Summary Row Demo
Azure Migration - Project Plan
ISO27001 Compliance Chec...
Project 1
Project 2
Project 3
Project 4
3 - Master Sheet Report
Azure Migration
Selected Sheets
2019 IT Rationalization - Issue ...
API Backlog
Azure Migration - Project Plan
Home Page Redesign
ISO27001 Compliance Checkli...
IT Portfolio Scorecard
PCI Compliance Checklist
Pricing Promotion for July
Rollout Marketing Automation S...
Cancel
Save

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | New Blank Report

File | Share

Grid View

Sheet Name

Report Builder

Please provide feedback

- Source Sheets
- Columns to Display
- Filter Criteria
- Sorting

Columns to Display

Type here to filter list.

- ✓ **Category (1)**
- Created (system column)
- Created By (system column)
- ✓ **Launch Date (1)**
- Modified (system column)
- Modified By (system column)
- ✓ **Objective (1)**
- ✓ **Output (1)**
- Path To Green (1)
- ✓ **Project Owner (1)**
- ✓ **Sheet Name (system column)**
- ✓ **Success Metric (1)**

Selected Columns

- Sheet Name (system column)
- Project Owner (1)
- Output (1)
- Objective (1)
- Success Metric (1)
- Launch Date (1)
- Category (1)

Cancel | Save

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Grid View

Sheet Name

Report Builder

Please provide feedback

- Source Sheets
- Columns to Display
- Filter Criteria
- Sorting

Report on sheets that match all conditions

Category | is one of | Select values...

0 selected

- Select All
- Blank
- Application Development (1)
- Asset Management (0)
- Infrastructure (0)
- Operations (0)
- Service Desk (0)

Add new...

Select Field

Cancel | Save

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Portfolio Report

File Share

Grid View Report Builder

	Sheet Name	Launch Date	Project Status	Budget Status	Overall Trend	Category	Project Stage	Project Owner	Modified	Modified By
1	Marketo Update	09/18/18				Application Development	In Progress	Dan Arildson	09/20/18 6:19 PM	robin.sherwo
2	Jira Cloud MIgration	09/18/18				Infrastructure	In Progress	Jim O'Farrell	09/20/18 6:19 PM	robin.sherwo
3	Exchange Upgrade	09/18/18				Operations	In Progress	Robin Sherwood	09/20/18 6:20 PM	robin.sherwo
4	Datacenter Move	09/18/18				Infrastructure	Exploratory	Allegra Silcox	09/20/18 6:18 PM	robin.sherwo
5	Azure Migration	09/18/18				Operations	Approved	Sara Liebert	09/20/18 6:21 PM	robin.sherwo
6	ISO Compliance Prep	09/18/18				Security & Compliance	In Progress	Paul Barrett	09/20/18 6:21 PM	robin.sherwo

COUNT: 8 MIN: 09/18/18 MAX: 09/18/18

Sheet Summary Launch Roadmap

- Summary fields and reports in EAP
- Right ”panel” UI
- Formulas support
  - Sheet to summary field
  - Summary field to sheet
  - Cross sheet
- Copy Summary fields from an existing sheet

smartsheet

ENGAGE / Q&A

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- Share your feedback in our survey in the ENGAGE app
- Stop by the Enterprise Solutions booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more

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