With the Construction and Facilities Management template set, you can quickly glance at critical project details, monitor projects by risk, category, or person, and use a form to capture on-site issues so you can take action faster.
Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

Construction and Facilities Management Template Set

What’s Included in the Set

With the Construction and Facilities Management template set, you can quickly find critical project details, monitor projects by risk, category, or person, and use a form to capture on-site issues so you can take action faster.

**In Progress Report**
A live, filtered view of all current work orders in progress.

**Project Sheet (x2)**
Tracks all of the tasks and deadlines for your projects.

**Master Roll-Up Sheet**
A central repository that rolls up metrics across all projects.

**Multi-Project Portal**
A dashboard that summarizes key information across multiple projects.

**At Risk Report**
A running log of at-risk tasks.
Construction and Facilities Management
Template Set Getting Started Guide

Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1:
Create a New Workspace

Open Home. From the home menu, click the Create button in the upper right hand corner. From the drop-down menu, select Workspace. Name the workspace.

Learn more:
Worksapces Overview, Workspace Sharing, Home Tab

Step 2:
Drag the Files into Workspace

Select the template set folder under your Sheets folder. Drag and drop the folder down to the workspace you just created.

Learn more:
Manage Items in a Workspace (Add, Move, Remove)
Construction and Facilities Management
Template Set Getting Started Guide

Customize

Step 3: Update Multi-Project Portal

The Multi-Project Portal dashboard is the keystone of your template set. It pulls together all of the critical project information you need to track. Dashboards are made of different widgets that pull real-time information in from your sheets and reports.

A. Click Edit in the upper left corner of the sheet to begin customizing. Hover your mouse over any widget and select the pencil icon to start modifying the widget and its contents.

B. Use the Image widget to replace the logo placeholder with your company’s logo.

C. Update the Key Contacts with information about your team and News with project updates.

D. Use the Shortcut widget to attach links to websites, files, or Smartsheet items in Quick Links.

E. Tasks by Status, Tasks by Category, and Workload: Outstanding Tasks by Person are all Chart widgets that pull live data from your Master Roll-Up sheet.

F. Both In Progress Tasks and At Risk Tasks are Report widgets, which display your live reports in your dashboard.

G. Replace the Insert Image Here with a profile picture and the pertinent details of who to contact for any questions.

Learn more: Make Changes to an Existing Dashboard, Viewing and Sharing a Dashboard, Widget Types for Smartsheet Dashboards
Step 4: **Open the Project Sheets**

Create a project sheet for each of your projects and use it to track all of the tasks and deadlines. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. It’s best to enable dependencies for projects with deadlines to ensure every moving part in your project is tracked and on time, and ultimately meet your deadline.

A. In the Task Name column, name the project phases in the parent (light gray) rows.
B. Use the indented child (white) rows in your hierarchy, to enter tasks in the Task Name column.
C. Starting on row 3, enter dates in the Start Date and End Date columns.
D. The other data on your ancestor and parent rows, including Start Date, End Date, % Complete, and Duration are auto calculated by the tasks below the parent row.
E. Enter contact names in the Assigned To columns to assign task owners.
F. Attach documents, proposals, or permits to the row in the Attachment (paperclip icon) column to keep all of your project information and resources in one place.

**Learn more:**
- [Project Management and Gantt Charts](#)
- [Parent Rollup Functionality](#)
- [Hierarchy: Indent or Outdent Rows](#)
- [Creating a Milestone to Mark a Significant Event in Your Project](#)
Step 5:
**Sheet Bonus: View or Edit Your Project Summary Data**

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. Both your Project sheets include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of task category, status, health, and project team allocations. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

Learn more:
- [Define Your Work with Sheet Summary](#)
- [Maximize Your Sheet Summary Usage](#)
- [Create a Portfolio View with a Summary Report](#)
Step 6: **Adjust Durations & Predecessors**

“Duration” and “Predecessor” are two unique column types that exist in project sheets.

A. Set the duration of each task in the “Duration” column.
B. Set predecessors, or relationships between tasks, in the “Predecessors” column.

[Table showing task details with columns for Start Date, End Date, % Complete, Duration, Predecessors, and Progress]

Learn more: [Project Sheet Columns: Start Date, End Date, Duration, % Complete, and Predecessors]

Step 7: **Update State of Task and Filters**

After you assign task owners, the owner can update the state of the task by selecting an option from a custom dropdown list in the State column. If you have multiple owners, filters are a great way to help people cut through the noise. On the project sheets, we created a shared filter called Tasks Assigned to Me. Anyone viewing the sheet can select that filter to see their assigned items.

A. To modify the options in the dropdown list, double-click on the State column header and edit the placeholders including the order of the list in the Values box. Repeat these steps to modify the options in the Task Category column.
B. Select the Filter Off button in the toolbar to create, use, or modify filters.

Learn more: [Dropdown List, Filters, Shared Filter]
Step 8: **Set Alert for Assigned Tasks**

An automated alert workflow, is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. An alert has been set on the project sheets to notify anyone shared to the sheet right away when a new task has been assigned to them.

A. To edit the alert workflow, click on Automation and select Manage Workflows in the dropdown menu.

B. Then double click on the workflow itself in order to edit the criteria.

Learn more:
- **Save Time and Work Faster With Automated Workflows**, **Control Who Can Receive Notifications from Your Sheet**

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Step 9: **Understand the Health Column Formula**

The Health column operates by a formula that looks at the Date columns and the State column. If the task is marked “Complete”, the color will be green regardless of Dates. If the task is not yet “Complete” and the Due Date is in the past, the color will be red. If the task is “Not Started”, it will be blue. Otherwise, it will be yellow.

Learn more:
- **Create and Edit Formulas in Smartsheet**
Step 10: **Understand the Completion Progress Column**

The Completion Progress column also operates by a formula that looks at the % Complete column. If the % Complete is less than 25%, then the bar is empty. If % Complete is between 25%-50%, then the bar is one quarter full. If % Complete is between 50%-75%, the bar is one half full. If % Complete is more than 75% but less than 100%, then the bar is three quarters full. If % Complete is 100%, then the bar is completely full.

Learn more: 
[Create and Edit Formulas in Smartsheet](#)

Step 11: **Use the Master Roll-up Sheet**

The Master Roll-Up sheet is a central repository where you can roll-up the metrics you want to track across all of the projects combined. We’ve designed this sheet with cross-sheet formulas so the metrics always reflect, in real-time, the information in the underlying sheets.

A. Overwrite the categories under each section to match the dropdown lists in the project sheets. Replace the names of the assignees in the Resource Metrics section.

B. If you added new types in the Task Category column in the project sheets, insert a new row to the Tasks by Category hierarchy and copy the formula. The formulas will automatically recognize the task type you enter in this section.

Learn more: 
[Cross-sheet Formulas](#)
Step 13:
**Manage the In Progress Report**

Use reports to create cross-sheet filtered lists of the tasks that meet certain criteria. For instance, the In Progress Report shows all items from both of your project sheets that are currently in the “In Progress” State. Reports are live, so as the state of tasks is updated, so will the data on the report.

A. The report is already set up. If you want to make any changes to the criteria used for the report, open the report and click on *Report Builder* and set your criteria.

Learn more:
[Reports](#)

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Step 12:
**Monitor the At Risk Tasks Report**

The At Risk report shows all of the items that are at risk.

A. The report is already set up. If you want to make any changes to the report’s criteria, open the report and click on *Report Builder* and set your criteria.

Learn more:
[Reports](#)
Step 14:

**Share Your Construction and Facilities Management Template Set**

Sharing is the best way to collaborate with others involved in your construction and facilities management process. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).

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**Learn more:**

[Workspace Sharing](#)

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**FEEDBACK:** Let us know what you think of the Construction and Facilities Management template set! Share your feedback [here](#).