



Project Intake

Template Set Getting Started Guide

With the Project Intake template set, you can track consulting projects, view project status, get notified when new projects are submitted, and get an overall view of all of your current consulting projects.

Project Intake

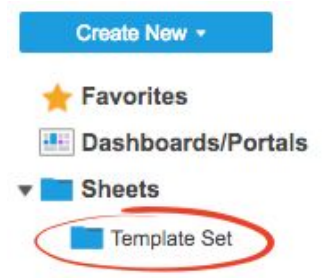
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

The data will download in the *Sheets* folder. Look on the left-hand side, under *Sheets*, to access and launch the template set items.

[Project Intake Template Set](#)

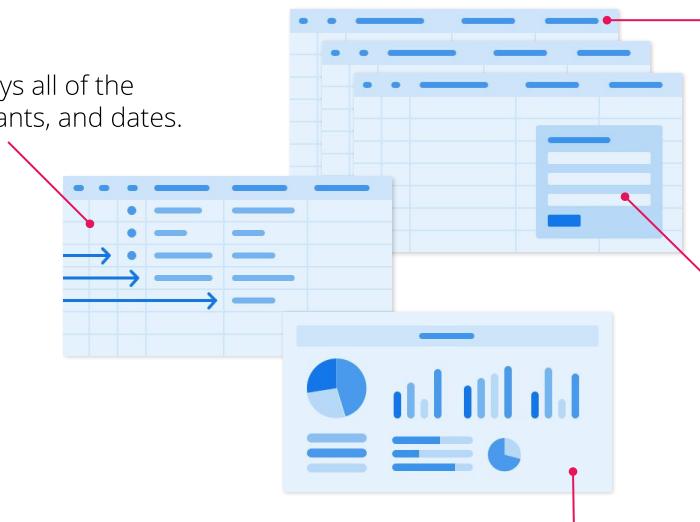


What's Included in the Set

With the Project Intake Template Set, you can track consulting projects, view project status, get notified when new projects are submitted and get an overall view of all of your current consulting projects.

Project Detail Report

Is a live filter that displays all of the projects, stage, consultants, and dates.



Project Tracker Sheet (x2)

Allows your team to manage specific projects and tasks.

Project Intake Sheet

Tracks and maintains all of your projects and the details of each.

Project Intake Form

Allows your team members to submit new consulting project requests.

Metrics Sheet

Shows projects by status and type, and displays consultant hour details.

Project Roll-Up Dashboard

A dashboard that summarizes your project requests, project detail, and statuses.

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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.

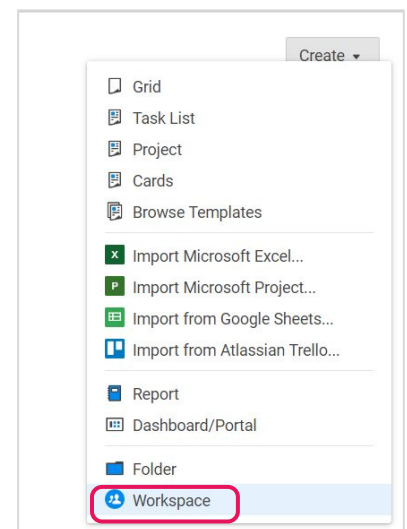
Step 1:

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:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



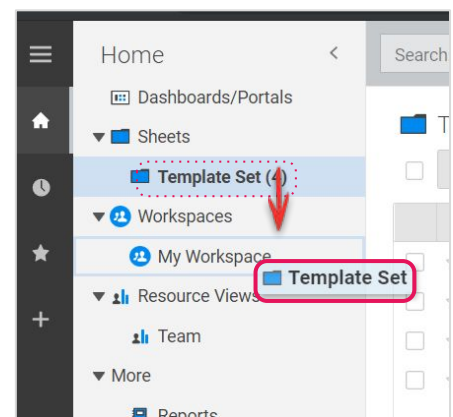
Step 2:

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 \(Add, Move, Remove\)](#)



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Customize

Step 3:

Modify the New Consulting Projects Form

The Project Intake form is where consultants submit new projects. This sheet is built with its own form, and when projects are submitted they are added to the respective sheet.

- Customize the form by first opening the Project Intake sheet and clicking on *Forms* in the top menu.
- Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.
- Click on *Add Field* to add a new field to your form. By creating a new field, you are also adding a new column to the sheet. Drag and drop the field into position on the left hand side of the form builder.
- Hit *Save* to close the form builder and copy and save the URL displayed. This URL is what you'll give to everyone who will be submitting requests.

Learn more:

[Forms, Edit Existing Fields](#)

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Step 4:

Modify the Project Intake Sheet

Use the Project Intake sheet to track and maintain all of your current consulting projects. You can keep record of project approval status, name and stage, clients, key dates, hours, contract value, and assigned consultant. The At Risk column is a *Symbols* column that project owners can flag on items that need immediate attention.

We have also set up conditional formatting rules so you can visually identify projects that have less than 50 hours remaining (red highlight). The Hours Remaining is a locked column to prevent editors from modifying the pre-built formula that calculates the remaining consultant hours. You can assign projects in the Assigned Consultant column, which is a *Contact List* column type. It's a best practice to use *Contact List* columns when assigning owners because they can be leveraged to set automated actions, alerts, reports, and more.

- Add or delete any columns to accommodate your team's unique process: right-click on any column and select *Edit column properties* or *Delete*.
- Customize, disable, or add the conditional formatting rules by clicking on the conditional formatting button in the top toolbar.
- An alert workflow has already been set on this sheet to notify anyone shared to the sheet when a new project has been assigned to them. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu. Then double-click on the New Assigned Consultant Project Alert workflow in order to open the editor window.
- From this sheet you can hyperlink to each project sheet where the tasks and details are managed. To modify the hyperlink, right click on the cell and select *Hyperlink*. You can create hyperlinks to other Smartsheet items, or to a relevant website.

	At Risk	Project ID	Project Name	Project Stage	Client	Sales Rep	Close Date	Manager	Approval Status	Start Date	End Date	Project Type	Available Hours
1		1234	Smartsheet	Kickoff	Smartsheet	Paul Finley	05/24/18	June Taylor	Submitted	07/07/18	12/05/18	Consulting	
2		2345	Anvil	Plan	Anvil	Dyna Appforth	04/04/18			06/04/18	10/31/18	Services	
3		3456	MBF	Kickoff	MBF	Linda King	03/05/18			05/04/18	09/27/18	Onsite	
4		4567	Smartsheet	Act	Smartsheet	Linda King	04/22/18			05/22/18	10/15/18	Training	
5		5678	Anvil	Build	Anvil	Paul Finley	05/01/18			06/01/18	10/25/18	Event	
6		6789	MBF	Test	MBF	Dyna Appforth	06/01/18			07/01/18	11/22/18	Consulting	
7		9123	Smartsheet	Optimize	Smartsheet	Dyna Appforth	06/15/18			07/15/18	12/06/18	Services	
8		4321	Anvil	Close	Anvil	Paul Finley	04/17/18			05/17/18	10/10/18	Onsite	
9		5432	MBF	Close	MBF	Linda King	03/20/18			04/20/18	09/13/18	Training	
10													
11													
12													
13													
14													
15													
16													
17													

Learn more:

[Create a Hyperlink to a Sheet, Report, or Website](#), [Use the Best Column Type for Your Data](#), [Save Time and Work Faster With Automated Workflows](#)

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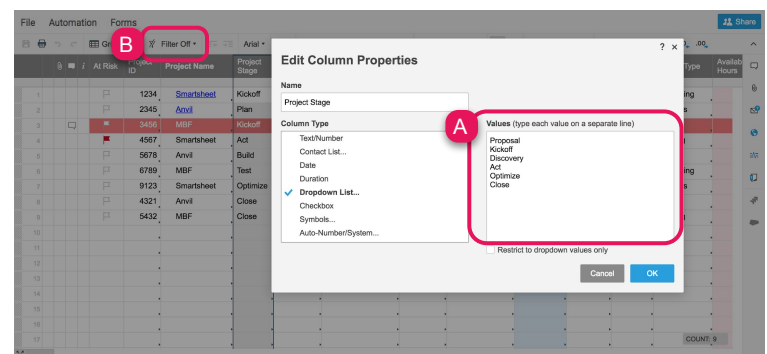
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Step 5:

Update Project Stage and Filters

After a project has been added to the sheet, people with editor permissions or higher can modify project information in unlocked columns. Anyone viewing the sheet can create filters to see projects that meet certain criterias. On the Project Intake sheet, we created a shared filter called Projects Assigned to Me. Anyone viewing the sheet can select that filter to only see their assigned items.

- To modify the options in the dropdown list, double click on the Project Stage column header and edit the options under *Values*. Repeat these steps to modify the options in the Project Type column.
- Select the *Filter Off* button in the toolbar to create, use or modify filters.



Learn more:

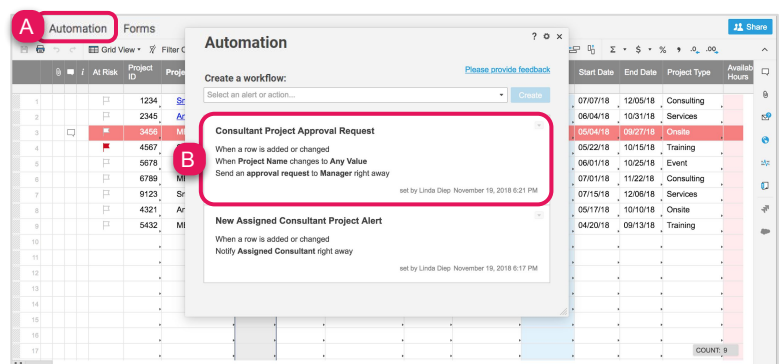
[Dropdown List](#), [Filters](#), [Shared Filter](#)

Step 6:

Edit Automated Approval Request

As new consultant projects get added, an automated approval request will be sent to the manager for their approval. An approval request is a great way to ask someone to approve or deny an item on your sheet automatically. The approval request will be sent to the manager listed in the Manager Contact column.

- To modify the automated approval request workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.
- Then double-click on the Consultant Project Approval Request workflow in order to open the editor window.



Learn more:

[Save Time and Work Faster With Automated Workflows](#)

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Step 7:

Modify the Project Tracker sheets (x2)

Use the Project Tracker sheet to track and maintain critical data about a project. Create a project sheet for each of your projects and use it to manage tasks and deadlines. Project sheets in Smartsheet have dependencies enabled and include 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.

We have also set up conditional formatting rules so you can visually identify tasks that are flagged at risk in the At Risk column (red highlight and task bar in Gantt chart).

- Enter the Project ID on row 3 and the vLookup formulas we built will automatically pull data from the Project Intake sheet that matches the Project ID. These rows are locked to prevent editors from modifying the formulas and data.
- In the Task Name column, name the project phases in the parent (light gray) rows. The other data on your parent rows, including Start Date, End Date, % Complete, and Duration are auto-calculated by the tasks below the parent row.
- Use the indented child (white) rows in your hierarchy, to enter tasks in the Task Name column, contact names in the Consultant column to assign task owners, and dates in the Start Date and End Date columns.
- Attach documents and other files to the row in the Attachment (*paperclip* icon) column to keep all of your project information and resources in one place.
- Customize, disable, or add the conditional formatting rules by clicking on the conditional formatting button in the top toolbar.

File	Automation	Forms	Filter	Sort	View	Columns	Rows	Conditional Formatting	Help
Project ID	1234	SmartSheet	Pat Manchester	05/24/18	07/07/18	12/05/18	Kickoff	Consulting	
Project Kick-Off	07/09/18	07/20/18	10d						
Task 1	07/09/18	07/12/18	4d						
Task 2	07/13/18	07/17/18	3d 13						
Task 3	07/18/18	07/20/18	3d 14						
Discovery	07/23/18	08/03/18	9d						
Task 1	07/23/18	07/26/18	4d 15						
Task 2	07/27/18	07/31/18	3d 17						
Task 3	08/01/18	08/02/18	2d 18						
Act	08/03/18	08/14/18	8d						
Task 1	08/03/18	08/10/18	6d 19						
Task 2	08/13/18	08/14/18	2d 21						

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](#), [vLookup Function](#), [Advanced Cross-sheet Formulas](#)

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Step 8:

Adjust Duration and Predecessors

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

- Set the duration of each task in the Duration column.
- Set predecessors, or relationships between tasks, in the Predecessors column.

Task	Start Date	Finish Date	Duration	Predecessors	Notes
	07/09/18	07/20/18	10d		
	07/09/18	07/12/18	4d		
	07/13/18	07/17/18	3d	13	
	07/18/18	07/20/18	3d	14	
	07/23/18	08/02/18	9d		
	07/23/18	07/26/18	4d	15	
	07/27/18	07/31/18	3d	17	

Learn more:

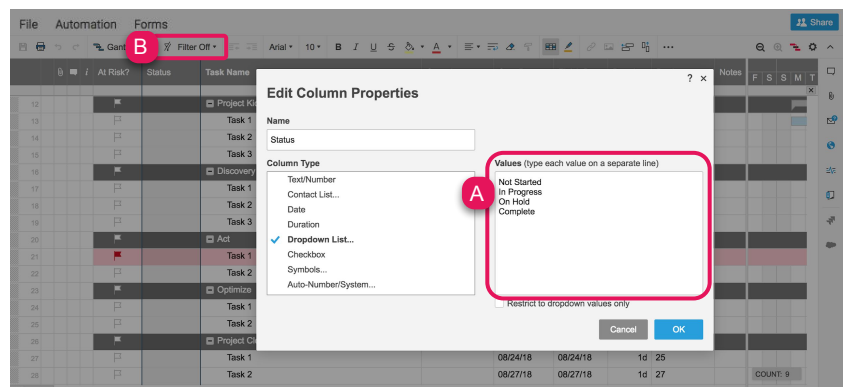
[Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors](#)

Step 9:

Update Status and Filters

After you assign task owners, the owner can update the task status by selecting an option from a custom dropdown list in the Status column. If you have multiple owners, filters are a great way to help people focus on their assignments. 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.

- To modify the options in the dropdown list, double-click on the Status column header and edit the placeholders including the order of the list in the *Values* box.
- Select the *Filter Off* button in the toolbar to create, use, or modify filters.



Learn more:

[Dropdown List](#), [Filters](#), [Shared Filter](#)

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Step 10:

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. The Project Intake with Form sheet and your Project Tracker sheets include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. On the Project Intake sheet, get a snapshot of project stage and type. On the Project Tracker sheets, you can see a quick recap of project information based on the Project ID you enter. Once the Project ID is entered, all other fields will populate. 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.

The screenshot shows the Smartsheet interface with a 'Sheet Summary' panel on the right. The panel includes a 'Please provide feedback' link, a 'WHAT IS SHEET SUMMARY?' section, a 'Summary Information' section, and an 'Enter Project ID to Populate Other Fields' section. The 'Enter Project ID' section has a text input field with '1234'. Below it are fields for 'Client' (Smartsheet), 'Sales Rep' (Paul Finley), and 'Project Lead'. A '+ New Field' button is at the bottom. A red circle 'A' highlights the sheet summary icon in the right sidebar, and a red circle 'B' highlights the '+ New Field' button.

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

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Step 11:

Review the Metrics Sheet

The Metrics sheet is a central repository where metrics you want to track across all project intake sheets are rolled-up. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real-time, the information in the underlying sheets.

- Overwrite the categories under each section to match your drop down lists in the Project Intake sheet. Replace the names of the consultants under the Consultant Hours section.
- If you added new project types in the Project Type column in the Project Tracker sheet, insert a new row to the Projects by Type section and copy the formula. The formulas will automatically recognize the request type you enter in this section. Repeat this step for Project by Stage.

Label	Value 1	Value 2	Value 3	Value 4
Projects by Stage	6			
Proposal	0			
Kickoff	2			
Discovery	0			
Act	1			
Optimize	1			
Close	2			
Projects by Type	Count			
Consulting	2			
Services	2			
Onsite	2			
Training	2			
Event	1			
Consultant Hours	Available Hours	Hours Used	Hours Remaining	Project Count
Molly Dickinson	1588	900	688	
Evan Williams	1000	499	501	
Molly Dickinson	1588	900	688	
Amanda Lovell	550	300	250	
Pat Manchester	1320	350	970	
Total	6046	2949	3097	

Learn more:

[Cross-sheet Formulas](#)

Step 12:

Open the Project Detail Report

Use reports to create cross-sheet filtered lists of the projects that meet certain criteria. For instance, the Project Detail report shows all projects, including stage, consultant, type, hours, and dates from the Project Intake and Roll-up sheet. Reports are live, so as the projects are updated, so will the data on the report. This report is surfaced in the Project Roll-Up dashboard.

- The report is already set up. If you want to make changes to the criteria or add another sheet used for the report, open the report and click on the Report Builder and set your criteria.

Project Name	Project Stage	Consultant	Project Type	Available Hours	Hours Used	Hours Remaining	Start Date	End Date
1234 Smartsheet	Kickoff		Consulting	700	600	100	07/07/18	12/05/18
2345 Anvil	Plan		Services	500	450	50	06/04/18	10/31/18
3456 MBF	Kickoff		Onsite	250	0	250	05/04/18	09/27/18
4567 Smartsheet	Act		Training	550	250	300	05/22/18	10/15/18
5678 Anvil	Build		Event	340	140	200	06/01/18	10/25/18
6789 MBF	Test		Consulting	880	830	50	07/01/18	11/22/18
9123 Smartsheet	Optimize		Services	88	88	0	07/15/18	12/06/18
4321 Anvil	Close		Onsite	500	51	449	05/17/18	10/10/18
5432 MBF	Close		Training	675	75	600	04/20/18	09/13/18

Learn more:

[Reports](#)

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Step 13:

Update Project Roll-Up Dashboard

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

- Click *Edit* in the upper left corner to begin customizing. Then hover over any widget and select the *pencil icon*.
- Replace the logo placeholder with your logo in the *Image* widget.
- Add general information or notes about the use of this dashboard and key contacts for your team by editing the *Rich Text* widget.
- Replace the Resource Links, a *Shortcut* widget, with quick links to your sheets, forms, reports, and other resources outside of Smartsheet.
- Hours Summary section includes three *Metric* widgets, pulling live data from your Metrics sheet.
- Edit the New Consulting Projects form, embedded using the *Web Content* widget, to replace the placeholder web content with your own Smartsheet form URL found in the Project Intake sheet.
- Consultant Hours and Request Status are *Chart* widgets that are also pulling live data from your Metrics sheet.
- The Project Detail is a *Report* widget, which displays your live report in your dashboard.



Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

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Step 14:

Share your Project Intake Template Set

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

Sheet Sharing

Invite Collaborators

Enter names or email addresses...

Permissions

Editor - can share

Admin

Editor - can share

Editor - cannot share

Viewer

Invite Details

Subject Line

Invitation to Edit

Personal message (optional)

☒ Notify people ☐ Cc myself

Collaborators (0)

This sheet is in a workspace: [Template Set Workspace](#)

Cancel Share Workspace Share Sheet

Learn more:

[Workspace Sharing](#)