Project Tracking and Rollup

Template Set Getting Started Guide

The Project Tracking and Rollup template set is the quick and easy way to get a project up and running, and report on risks and milestone to stakeholders.
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.

Project Tracking and Rollup Template Set

What’s Included in the Set

With the Project Tracking and Rollup template set, you can accelerate work execution and run more effective projects.

**Project Milestones Report**
Track critical project milestones.

**Project Plan Sheet**
Track all of the tasks and deadlines for your project.

**At Risk Report**
A running log of at-risk tasks.

**Project Rollup Dashboard**
A dashboard that summarizes key project details.
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)
## Customize

### Step 3: Modify the Project Plan Sheet

Use the Project Plan sheet to track and maintain critical data about a project. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. The project plan will automate your project timeline from the start date forward and will provide an estimated end date based on project tasks. It's best to enable dependencies for projects with deadlines to ensure every milestone 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 grandchild (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. Attach documents or links to webpages to the row in the Attachment (paperclip icon) column to keep all of your project information and resources in one place.

F. Track the progress of your project by viewing the interactive Gantt timeline to see which tasks are complete (green), which are late (red), which are in progress (blue), and which are on hold (orange). Conditional formatting rules apply formatting automatically to rows or cells based on the values they contain.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Status</th>
<th>Assigned To</th>
<th>Start Date</th>
<th>End Date</th>
<th>% C</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROJECT NAME</td>
<td></td>
<td></td>
<td>03/05/18</td>
<td>04/24/18</td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td>03/05/19</td>
<td>04/02/19</td>
<td></td>
</tr>
<tr>
<td>Project Kickoff</td>
<td>Not Started</td>
<td>Example Name</td>
<td>03/05/18</td>
<td>03/09/18</td>
<td></td>
</tr>
<tr>
<td>Activity 1</td>
<td>On Hold</td>
<td>Example Name</td>
<td>03/12/18</td>
<td>03/15/18</td>
<td></td>
</tr>
<tr>
<td>Activity 2</td>
<td>Complete</td>
<td>Example Name</td>
<td>03/15/18</td>
<td>03/26/18</td>
<td></td>
</tr>
<tr>
<td>Activity 3</td>
<td>In Progress</td>
<td>Example Name</td>
<td>03/27/18</td>
<td>03/29/18</td>
<td></td>
</tr>
<tr>
<td>Collect Deliverables</td>
<td>Not Started</td>
<td>Example Name</td>
<td>03/30/18</td>
<td>04/02/18</td>
<td></td>
</tr>
<tr>
<td>Execution</td>
<td></td>
<td></td>
<td>04/03/18</td>
<td>04/11/18</td>
<td></td>
</tr>
<tr>
<td>Kickoff Activity</td>
<td>Not Started</td>
<td></td>
<td>04/03/18</td>
<td>04/03/18</td>
<td></td>
</tr>
<tr>
<td>Phase 1</td>
<td>Not Started</td>
<td></td>
<td>04/04/18</td>
<td>04/06/18</td>
<td></td>
</tr>
<tr>
<td>Activity 1</td>
<td>Not Started</td>
<td></td>
<td>04/04/18</td>
<td>04/04/18</td>
<td></td>
</tr>
</tbody>
</table>

Learn more:
- Project Management and Gantt Charts
- Hierarchy: Indent or Outdent Rows
- Date Column Type
- Parent Rollup Functionality
- Upload an Attachment
- Symbols Column Type (i.e. Status symbols, Decision symbols, etc.)
- Using Column Symbols
- Apply Formatting Automatically with Conditional Formatting Rules
Step 4: **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.

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

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Step 5: **Assign Tasks to Team Members**

Assign tasks to individuals by adding their email addresses in the Assigned To column. A contact includes both the name and email address, which drives delivery of automated actions, alerts, reports, and more.

A. Add contacts in the Assigned To column by individually creating a new contact, or adding an existing contact from your Contact List.

Learn more:
[Contact List Column](#), [Manage Contacts in the My Smartsheet Contacts List](#)
Step 6: **Adjust Alert**

An automatic 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*
An automated recurring reminder is a great way to save time and keep track of deadlines. The Recurring Incomplete Task alert will notify the contact listed in the Assigned To column every day when the End Date is in the next 3 days and where the current Status is On Hold, Not Started, or In Progress. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

A. Modify the reminder by going to Automation and selecting Manage Workflows in the dropdown menu. Then double-click on the workflow to open the editor window.

B. To customize the workflow’s schedule (trigger box), click on the dropdown that begins with Every day starting on and select Run once to trigger on a single date, or choose Custom to edit the recurrence schedule.

C. Customize the workflow conditions (condition boxes) to add criteria and then click Save.
Step 8:

**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 Plan sheet includes 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 the status of tasks and the count of those at risk. 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
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Step 9: **Update Status and Filters**

After the task has been assigned, the task owner can update the status by selecting an option from a custom dropdown list in the Status column. If there are multiple owners, filters are an ideal way to help people cut through the noise. On the Project Plan sheet, we created a shared filter called *Tasks Assigned to Me*. Anyone viewing the sheet can select that filter and see only their assigned items.

A. Click on the *Filter* button and select *Tasks Assigned to Me* to see tasks assigned to the current user viewing the sheet. You can also select any of the other filter options to perform other tasks.

B. 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: **View the Project Milestone Report**

The Project Milestones Report tracks all the critical project milestones by displaying any rows where the duration is *equal to 0* (the definition of a milestone), and the *Task Name* is *not blank*. The information in this report also appears on the Project Rollup Dashboard.

Learn more: [Reports]
Step 11: **Use the At Risk Report**

A task is automatically flagged as *At Risk* if the status is not *Complete* and the *End Date* is in the past. This report surfaces all at-risk tasks in one view, and also displays them on the Project Tracking and Rollup dashboard.

Learn more: [Reports](#)

Step 12: **Use the Unique Formulas**

The At Risk column on the project plan leverages a formula to automatically flag Tasks that have an End Date in the past and do not have a status of *Complete*. The formula looks like this:

$$=IF(AND([End Date]< TODAY(), NOT(Status = "Complete")), 1, 0)$$

The logic states that if the *End Date* is less than today (in the past) and status is not *Complete* then 1 (flag the row as at risk). If these statements are not true, then 0 (do nothing), and don't flag the row as at risk.

Learn more: [Formulas and Functions](#)
Customize

Step 13: Monitor Your Project Tracking and Rollup Dashboard

The Project Tracking and Rollup 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 in real-time information from your sheets and reports.

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

B. Project Information is a Metric widget that summarizes key project data in your project plan.

C. Key Project Links and Key Resources are Shortcut widgets that you can use to link sheets, reports, and other resources that reside outside of Smartsheet.

D. Update the Key Contacts with information about your team.

E. Both Project Milestones (not shown below) and At Risk Tasks are Report widgets, which display your live reports in your dashboard.

Learn more:
Make Changes to an Existing Dashboard, Viewing and Sharing a Dashboard, Widget Types for Smartsheet Dashboards
Step 14: 
Share Your Project Tracking and Rollup Template Set

Sharing is the best way to collaborate with others involved in your projects. 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.

Learn more: 
Workspace Sharing

FEEDBACK: Let us know what you think of the Project Tracking and Rollup template set! Share your feedback here.