



ENGAGE 2019

Advanced Dashboards: Taking It to the Next Level

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Assumptions

1. You've built dashboards already
2. Basic dashboard widget proficiency
3. Able to use cross-sheet formulas
4. Audience in mind for your dashboard
5. Know the key metrics you want to display

Product Development Escalations - Executive



P1 10 P2 32 P3 18 % Fixed 58%

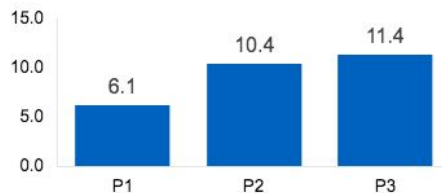
On Time Acknowledgement

86%

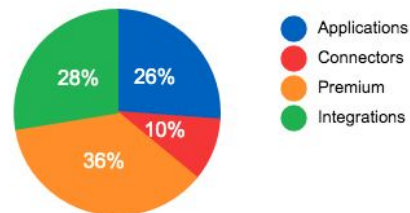
Average Hours to Acknowledge

5.2

Average Hours to Resolve



Total Distribution



RESOURCE LINKS

- ☐ MBFC Escalations
- ☐ MBFC Closed Escalations
- [Escalation Wiki - How To](#)
- [Escalation Workspace](#)
- ☐ File a Support Request!
- ☐ File a GDPR Request!
- ☐ File a T3 Request
- ☐ File a BI Request!

COMMUNICATION BRIDGES

P1 - Slack: #escalations-alerts-p1

P1 - Call: <https://meet.google.com/abc-efc-pqr>

+1425-222-1234 | PIN: 123 678 910#

P2 & P3 - Slack: #escalations-alerts-p2-p3

Escalation Type



Escalations P1

Priority	ESC ID	Escalation Title	Status	Assigned To	Created On	Service Team
P1	ESC-1428	Configuration exception when logging in	Resolved Pending Customer	Alok Kumar Bansal, Wei	09/04/19	Automation
P1	ESC-1313	BI Request	Waiting Prod/Eng	Prabhjot Singh	09/25/19	UX Framework
P1	ESC-1429	Selecting a date range to export and print from Calendar view inconsistent	Assigned	Rachel Singh	09/03/19	Front End Components
P1	ESC-1430	Inverted view on calendar app does not display correctly with Australian localization	Assigned	phuoc.do@smartsheet.c	09/08/19	Calendar App

Product Development Escalations

EXECUTIVE

MANAGER

TEAM

Executive View



OPEN P1

10

OPEN P2

32

OPEN P3

18

ON TIME ACKNOWLEDGMENT

85%

LAST 30
DAYS



TRENDING

% REQUIRED FIX

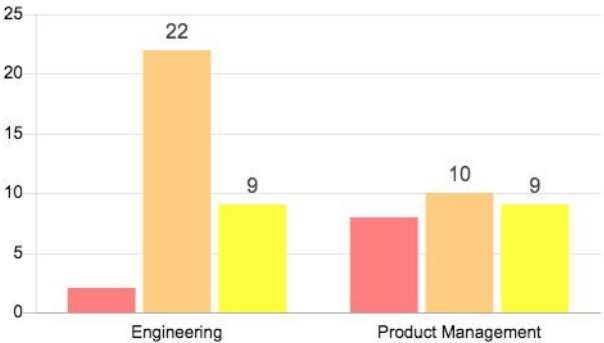
58%

LAST 30
DAYS

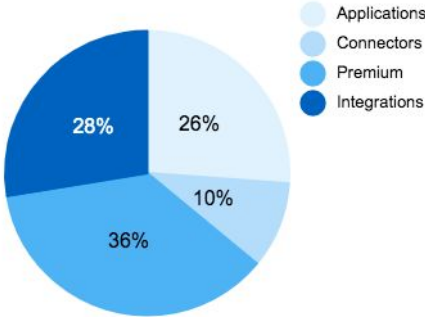


TRENDING

ESCALATION COUNT BY DEPARTMENT



PRODUCT DISTRIBUTION



PRODUCT AREA

Primary	P1	P2	P3
Applications	3	10	5
App - Smartsheet Web	0	4	3
App - Smartsheet Mobile	2	4	0
App - Smartsheet Gov	1	1	2
App - 10,000ft	0	1	0
App - Bridge	0	0	0
Connectors	2	3	4
Connector - Jira / Salesfores	1	1	3
Connector - MSFT Dynamics	0	0	0
Connector - Live Data	1	2	1
Premium	4	10	3
Premium - Control Center	1	5	1
Premium - DvynamicView	0	0	0

Goals

Show you how to...

1. Leverage the right “Smartsheet tool” to calculate key metrics
2. Create the underlying metric data to report and chart on
3. Apply design techniques to improve information visibility

Leverage the Right “Smartsheet Tool” to Calculate Key Metrics



Right “Smartsheet Tool” for Key Metrics

To easily display key metrics on your dashboard via metric widgets, reports and charts, can calculate key metrics in two places:

1. Sheet Summary (feature)
2. “Metric Sheet” (sheet you build)

Sheet Summary

Sheet Summary :										
			Level	Issue	Status	Priority	Team Assigned	Submitted On	Resolved On	Days to Complete
1			1	Issue 1	Complete	P1	Team A	06/01/19	06/04/19	3
2			1	Issue 2	Complete	P1	Team A	06/01/19	06/11/19	10
3			1	Issue 3	Complete	P1	Team A	06/01/19	06/05/19	4
4			1	Issue 5	Complete	P2	Team B	06/01/19	06/03/19	2
5			1	Issue 6	Complete	P2	Team B	06/03/19	06/14/19	11
6			1	Issue 4	Complete	P2	Team B	06/04/19	06/06/19	2
7			1	Issue 7	Complete	P3	Team C	06/10/19	06/14/19	4
8			1	Issue 8	Complete	P3	Team C	06/17/19	06/19/19	2
9			1	Issue 9	Complete	P3	Team C	06/17/19	06/20/19	3
10			1	Issue 10	Complete	P1	Team A	06/19/19	06/20/19	1
11			1	Issue 16	Complete	P1	Team A	07/05/19	07/08/19	3
12			1	Issue 11	Complete	P1	Team A	07/08/19	07/13/19	5
13			1	Issue 12	Complete	P1	Team A	07/08/19	07/11/19	3
14			1	Issue 17	In Progress	P2	Team A	07/09/19		
15			1	Issue 18	Complete	P3	Team A	07/13/19	07/19/19	6
16			1	Issue 20	Submitted	P2	Team A	07/14/19		
17			1	Issue 27	Complete	P3	Team C	07/15/19	07/19/19	4
18			1	Issue 21	Not Started	P3	Team A	07/15/19		

Sheet Summary :

Team Leader

Jenna Shimek

Open Bugs $f(x)$

43

Closed Bugs $f(x)$

26

Percent Closed $f(x)$

37.68%

Avg Days to Complete $f(x)$

4.0

Pillar

Green

+ New Field

Sheet Summary

Great place to organize and calculate key metrics because it is quick and easy to do, and enables you to aggregate the same metric across multiple sheets.

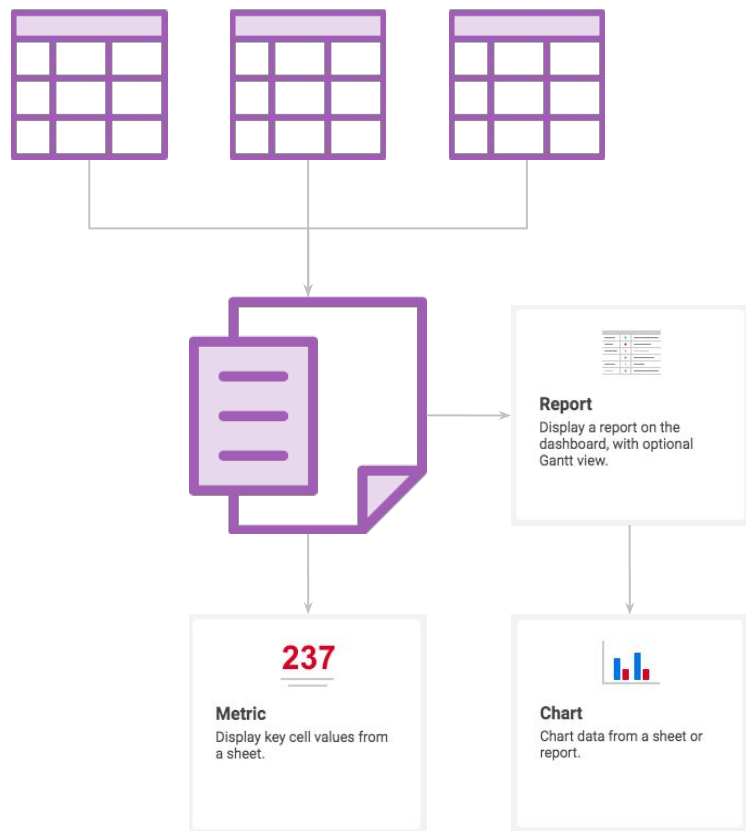
Can do:

- Build a sheet summary report
- Chart from a sheet summary report
- Surface summary metrics on a dashboard

New! - Sheet summary metric widget

Tough to:

- Build charts containing multiple variables on each axis



Sheet Summary

Recommend using sheet summary as your tool of choice if you are adding data to your dashboard that **lives across multiple sheets**.

This type of data might be business metrics that are standard across every program, department or project you manage.

Sheet Summary : ? x

Team Leader

Jenna Shimek

Open Bugs $f(x)$

43

Closed Bugs $f(x)$

26

Percent Closed $f(x)$

37.68%

Avg Days to Complete $f(x)$

4.0

Pillar

Green

+ New Field

Metric Sheet

A “metric sheet” is a sheet you build, leveraging cross-sheet formulas to calculate detailed key metrics based on information in another sheet (your source sheet).

Can Do:

- Build complex calculations
- Tailor metrics specific to your team
- Capture trends
- Provide data source for complex charting
- Provide data source for complex reporting

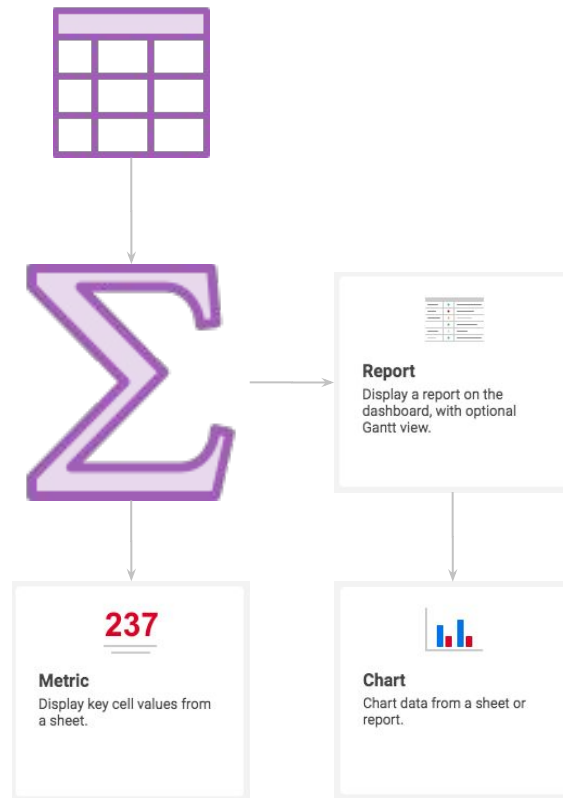
Team	Submitted	Not Started	In Progress	Complete
	Submitted	Not Started	In Progress	Complete
Team A	5	6	5	9
Team B	4	5	7	9
Team C	3	5	3	8
All	12	16	15	26

Start Date	End Date	Pr...	D...	Submitted	Not Started	In Progress	Complete		Avg Days to Complete	Days to Complete... Goal
				Submitted	Not Started	In Progress	Complete			
06/02/19	06/08/19		7d	0	0	0	2		6.5	1
06/09/19	06/15/19	2	7d	0	0	0	1		4.0	1
06/16/19	06/22/19	3	7d	0	0	0	3		2.0	1
06/23/19	06/29/19	4	7d	0	0	0	0		TBD	1
06/30/19	07/06/19	5	7d	0	0	0	1		3.0	1
07/07/19	07/13/19	6	7d	0	0	1	3		3.5	1
07/14/19	07/20/19	7	7d	2	1	0	3		2.0	1
07/21/19	07/27/19	8	7d	1	0	1	1		1.0	1
07/28/19	08/03/19	9	7d	1	1	2	1		1.4	1
08/04/19	08/10/19	10	7d	0	2	1	1		0.3	1
08/11/19	08/17/19	11	7d	0	3	0	1		1.5	1
08/18/19	08/24/19	12	7d	0	1	1	1		0.7	1
08/25/19	08/31/19	13	7d	1	1	1	1		1.0	1

Metric Sheet

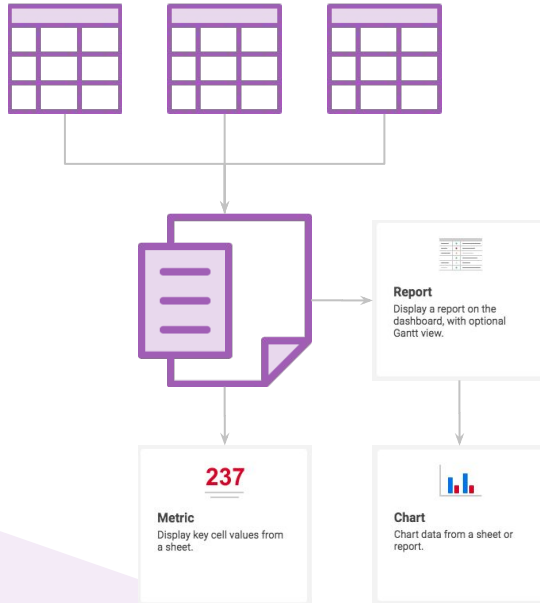
Recommend building a metric sheet if you want to **build complex reports or charts** of key metrics for your dashboard, and the data lives in **one source sheet**.

This type of data might be team or project data, and be different from team to team or project to project.

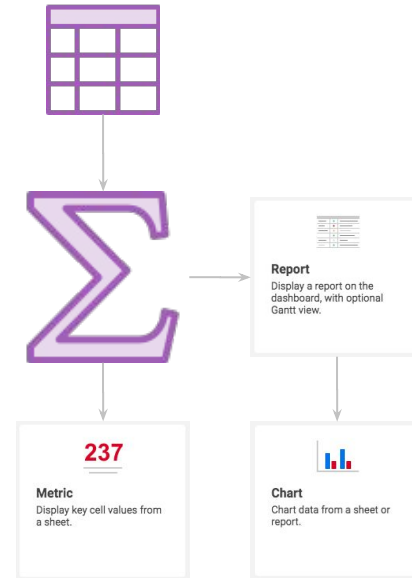


The Right “Smartsheet Tool” for Key Metrics

Leverage Sheet Summary



Build a Metric Sheet



Create Underlying Data



Underlying Data - Sheet Summary

Live How To

Sheet summary session
Thursday @ 9:45 AM
Madyson Morris & Robin Sherwood

Underlying Data - Metric Sheet

237

Metric

Display key cell values from a sheet.



Chart

Chart data from a sheet or report.



Shortcut

Link to commonly accessed files, URLs, and Smartsheet items.

A small icon representing a report, showing a table with columns and rows, and a Gantt chart below it.

Report

Display a report on the dashboard, with optional Gantt view.



Image

Add a company logo or any other image to your dashboard.

T

Title

Add a title to your dashboard.

T

Rich Text

Enter richly formatted text for instructions or updates.

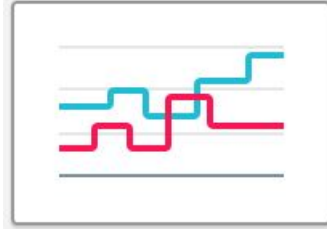
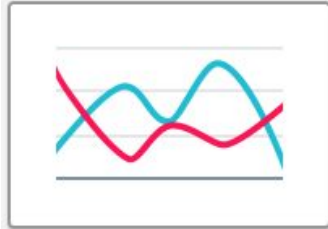
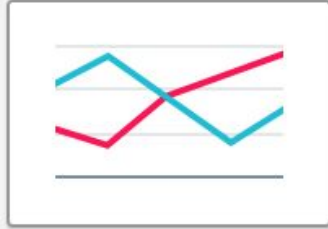


Web Content

Display videos, Smartsheet forms, and other web content for your team.

Chart Options

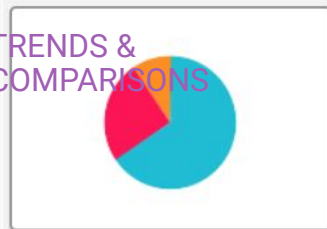
Line



Side Bar



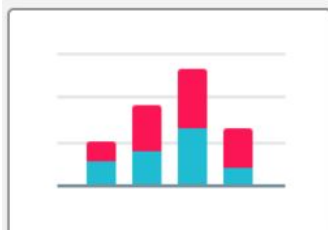
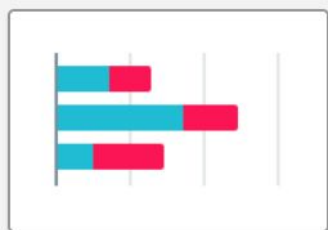
TRENDS &
COMPARISONS



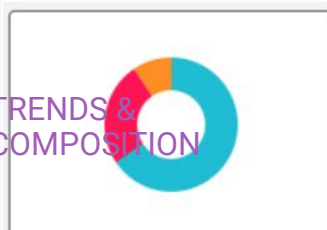
Pie

COMPOSITION &
DISTRIBUTION

Stacked Bar



TRENDS &
COMPOSITION



Donut

Pick Chart Type

DISTRIBUTION, COMPARISON, or COMPOSITION

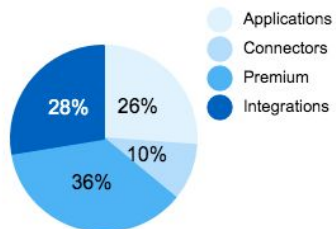
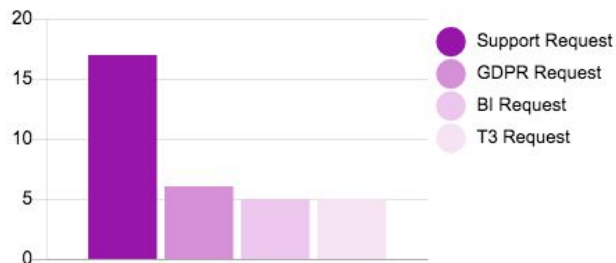


TREND

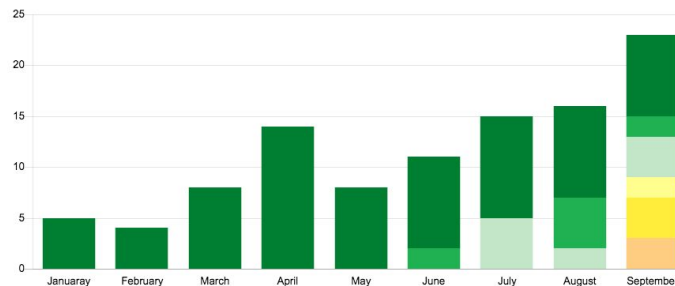


Pick Chart Type

DISTRIBUTION, COMPARISON, or COMPOSITION



TREND



Metric Sheet Types

“General” metrics sheet

Row and columns may have any type of criteria

Example:

Primary	Priority 1	Priority 2	Priority 3
Team A	=COUNTIF(..)	13	16
Team B	4	3	10
Team C	0	2	5

“Trend” metrics sheet

Sheet must have at least one date column!

Example:

Primary	Start Date	Priority 1	Priority 2 ...
Week 1	9/29/19	=COUNTIF(..)	20
Week 2	10/6/19	3	10
Week 3	10/13	2	5

Live How To

REPORTS

REPORTS	Team x Status				Team x Priority				Team x Assignee	
	Team	Submitted	Not Started	In Progress	Complete	Team	P1	P2	P3	
	Team A	5	6	5	9	Team A	12	6	7	not applicable using sheet data
	Team B	4	5	7	9	Team B	4	13	8	
	Team C	3	5	3	8	Team C	3	8	8	



TREND METRIC SHEET

Trend Metrics - Green Pillar Weekly By MBFCORP

Grid View Filter

Arial 10 B I U

Report Abuse Help

		Start Date	End Date	Pr...	D...	Submitted	Not Started	In Progress	Complete		Avg Days to Complete	Day Cor Goa
						Submitted	Not Started	In Progress	Complete			
1												
2		06/02/19	06/08/19		7d	0	0	0	2		6.5	
3		06/09/19	06/15/19	2	7d	0	0	0	1		4.0	
4		06/16/19	06/22/19	3	7d	0	0	0	3		2.0	
5		06/23/19	06/29/19	4	7d	0	0	0	0		TBD	
6		06/30/19	07/06/19	5	7d	0	0	0	1		3.0	
7		07/07/19	07/13/19	6	7d	0	0	1	3		3.5	

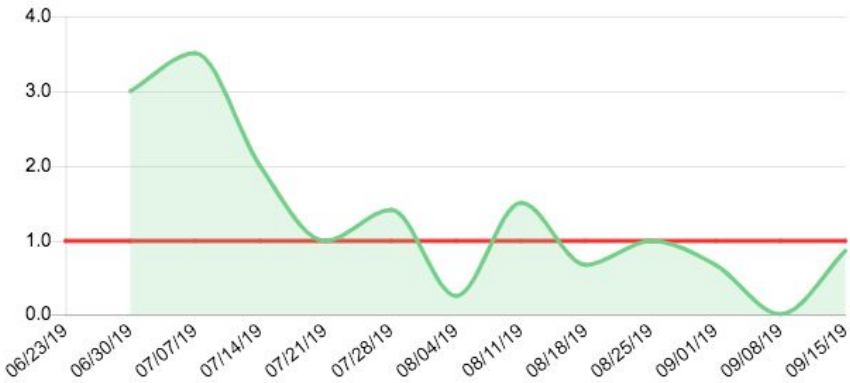
TREND STACKED CHART



TREND REPORT

Start Date	Submitted	Not Started	In Progress	Complete	Avg Days to Complete
06/23/19	0	0	0	0	TBD
06/30/19	0	0	0	1	3.0
07/07/19	0	0	1	3	3.5
07/14/19	2	1	0	3	2.0
07/21/19	1	0	1	1	1.0
07/28/19	1	1	2	1	1.4
08/04/19	0	2	1	1	0.3
08/11/19	0	3	0	1	1.5
08/18/19	0	1	1	1	0.7
08/25/19	1	1	1	1	1.0
09/01/19	1	1	2	2	0.7
09/08/19	0	1	3	0	0.0
09/15/19	1	3	2	1	0.9

TREND LINE CHART



Example Mock Dashboards

Charting pro tips

Sheet design

- Name your columns how you want them to be displayed in the chart
- Include “separator columns” to make the data easy to look at
- Leverage row “levels” for conditional formatting
- For “trending” metric sheets - enable dependencies
- For “trending” metric sheets - remove Holidays from dependency exclusions

Writing formulas

- Leverage @row in formulas
- Leverage \$ in formulas
- Reference text from a cell in the sheet; do not type the “criteria” you want into the formula

Charting

- Chart from a report whenever possible
- Chart using “all columns” from report whenever possible - does not change formatting if data changes
- Use column with repeating single value to display a straight line on a line chart
- Match chart formatting to sheet formatting on dashboard

Taking Formulas to the Next Level
Thursday @ 11:00 AM
Cornelius Oconnor

Apply Design Techniques to Improve Information Visibility



Dashboard Viewer Filter

Tailor information on reports and charts to the dashboard viewer.

Can do:

- Show only viewer specific information

New! - Dashboard viewer reports on dashboards

New! - Dashboard viewer charts on dashboards

- Create one dashboard for multiple individuals
- Restrict viewers to only see what they have access to

×

Advanced Options

How do you want to scope this widget's data?

☐ Widget editor
Every dashboard viewer sees the same data set as the widget editor regardless of sheet permissions. If the 'Current User' filter is applied to the underlying report, the widget is filtered to rows containing the widget editor's name in the contact column.

☒ Dashboard viewer
Every dashboard viewer only sees the data they have access to. If the 'Current User' filter is applied to the underlying report, each viewer only sees rows with their name in the contact column.

When this widget is clicked on

Note: Only people with access to the source report will be able to view it.

Cancel

OK

Dashboard formatting

Pick your dashboard formatting

1. White or grey background
2. Decide on text formatting

Title

HEADER ONE

Header Two

Informational Text



3. Update widget header background color
4. Be consistent!

Keep your widget format and settings the same!

New! Widget cut/copy and paste functionality

- Keyboard shortcuts enabled
- Shadow of widget paste location
- Dynamically move widgets when pasting
- Paste across dashboards & browser tabs
- Maintains source data

New! Ability to left, center, right align widget titles

Dashboard formatting

Suggestions:

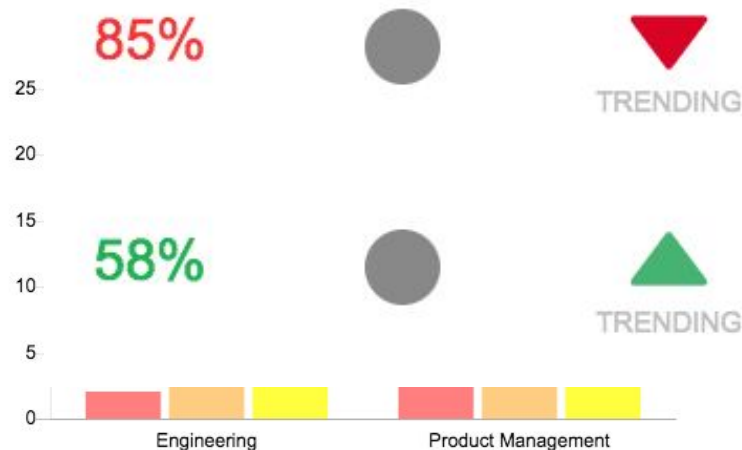
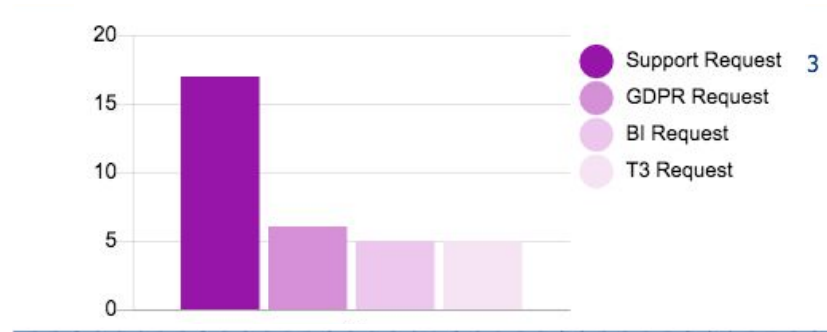
- White dashboard background
- White widget title background
- Center align widget titles
- Text Format:
 - Title text: large size, dark color, bold
 - Headers: medium size, lighter color
 - Informational text: small, easy to read black or grey font
- Customize dashboard auto-refresh
- Make sections in your dashboard

**Pro Tips:

1. Choose text formatting color be from the same color palette
2. Use underscores to create sections
3. Add title widget background color and have no text to create section line

Data formatting

1. Pick data you want to accentuate. Make it **pop** with colors that are different from your dashboard scheme.
2. In charts, use the same color with varied gradient or different colors to help the audience relate information on the dashboard. Eg: match chart formatting to metric or report formatting
3. Use source sheet cell formatting in metric widget
4. Be mindful of people with color blindness. Use symbols instead of circles in a metric widget. Setup the symbol to automatically change with a formula.



Live How To

Q&A

Take a 3-minute survey!



ENGAGE 2019