



ENGAGE 2019

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Getting Started With Formulas

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Agenda

Learning objectives

Essentials for building formulas

Using formulas to enhance your workflows

Key takeaways

Resources to learn more

Learning objectives



Use Smartsheet formulas to automate workflows and reduce manual sheet changes.



Drive consistency of data using appropriate formulas.



Leverage formulas in sheet summary to summarize projects.

Using cell & column references

Cells are referenced by a column name and row number.

Example: **Column Name: Budget** & **Row: 1** = **Budget1**

Example: **Column Name: Actual Amount** & **Row: 1** = **[Actual Amount]1**

Example whole column reference: **Difference:Difference**

	Task Name	Budget	Actual Amount	Difference
1	- Total Project Budget	9000	8750	=Budget1 - [Actual Amount]1

Formula vs. function

Which is which?

- **Formula:** an **expression** which calculates the value of a cell.
 - Example: = Budget1 + Budget2
- **Function:** a **predefined formula**, such as SUM, COUNT & IF.
 - Example: = SUM(Budget1:Budget4)
- A function can be a formula, but a formula is not always a function!

Options to create a formula

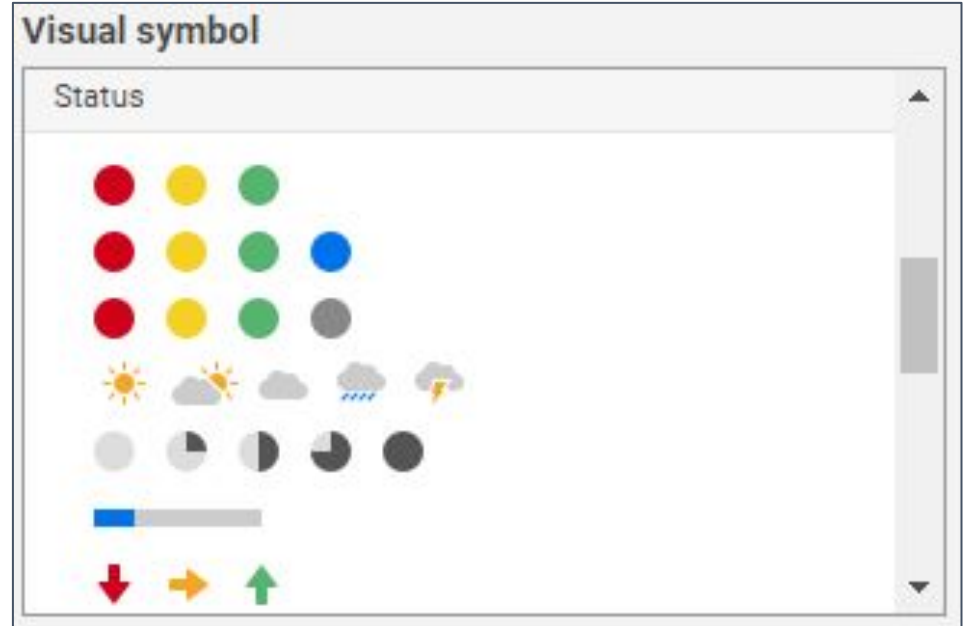
Four ways to create a formula:

- Use the function icon on the toolbar.
- Type an equal (=) sign followed by the formula.
- Copy and paste, or drag-fill a formula into the cell.
- Automatically added in if there are consistent formulas in rows above or below.

Building a Smartsheet formula

Symbols are referenced by the name of the icon.

Checkboxes, flags & stars are binary and referenced by a 1 or 0, where 1 = positive.



Intro to Number Functions

SUM(), COUNT()

SUM() & COUNT()

The foundation for metrics

- SUM() allows you to sum numbers:
 - ***=SUM(Budget1:Budget50)***
- COUNT() allows you to count non-blank values:
 - ***=COUNT([Task Name]:[Task Name])***

Intro to Hierarchy Function

CHILDREN()

CHILDREN()

Formula references simplified

- Smartsheet has a unique function that leverages the hierarchical relationships in your sheets:
 - **CHILDREN()**
- The CHILDREN() function is paired with other functions to simplify references:
 - Replaces **=SUM(Budget10:Budget18)** with **=SUM(CHILDREN())**

Intro to Conditional Functions











IF(), SUMIF(), COUNTIF()

IF(), SUMIF() & COUNTIF()

Build metrics for any condition

- **IF()** allows you to create conditional statements and can automate your sheet in new ways:
 - ***=IF(Budget8 > 1000, 1, 0)***
- **SUMIF()** allows you to sum numbers *if* they meet criteria:
 - ***=SUMIF([Budget Approved]:[Budget Approved], 1, Budget:Budget)***
- **COUNTIF()** allows you to count matches *if* they meet criteria:
 - ***=COUNTIF(Stage:Stage, "Finished")***

Sheet summary report

File ☆ Store Opening Report									
     Grid View ▾   									
		Sheet Name	Store Project ID	Store Type	Project Manager	Finished Tasks	In Progress Tasks	Not Started Tasks	Approved Budget Total
		 							
	1	Store Opening Plan North	1111	Retail	Benjy	8	12	20	\$17,630.00
	2	Store Opening Plan West	1114	Cafe	Benjy	23	3	14	\$28,370.00
	3	Store Opening Plan South	1112	Food	Benjy	5	12	23	\$9,650.00
	4	Store Opening Plan East	1113	Retail	Benjy	11	9	20	\$19,930.00

Key Takeaways

Formulas help you to:

- Automate workflows and reduce manual sheet changes.
- Drive consistency of data.
- Summarize projects in sheet summary.

Resources

The screenshot shows the Smartsheet Learning Center homepage. At the top is a dark blue navigation bar with the Smartsheet logo, 'Contact Support', and a 'Log In' button. Below this is a blue bar with links to 'Learning Center', 'Help Articles', 'Community', and 'Training'. A search bar with a 'Filter Search' dropdown and a 'Search' button is also present. A yellow banner announces the third-annual Smartsheet ENGAGE customer conference. The main content area features a 'What's New' section with links to various resources, and three columns for 'Get Started', 'Smartsheet Intermediate', and 'Smartsheet Advanced' learning paths, each with a numbered badge and a brief description.

smartsheet

Contact Support

Log In

Learning Center Help Articles Community Training

Filter Search Search

Our third-annual Smartsheet ENGAGE customer conference is Sept. 30 - Oct. 3 in Seattle, WA
[Learn More](#)

What's New:

- [Register for the Engage'19 Conference](#)
- [New Formulas and Functions](#)
- [Standardized Date Formats](#)
- [Recurring Multi-step Automated Workflows](#)
- [Sheet Summary and Sheet Summary Reports](#)

Get Started
Basics of building a sheet

Smartsheet Intermediate
Track and Automate

Smartsheet Advanced
Work at Scale



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