About Cloud Migration

Gartner estimates that 60% of business users, about 700 million people, will have cloud capabilities by 2022. But moving to the cloud doesn’t just happen on its own. IT departments need to think through all aspects of cloud migration to keep up, from choosing a service provider to migrating applications. This guide is built to help you use Smartsheet to successfully plan for and execute a cloud migration for your organization.

Identify the best vendors
Compare cloud service providers across the same criteria to select the optimal partners.

Prepare your organization and systems
Conduct a robust readiness assessment to ensure your organization is fully prepared for its cloud migration.

Stay in control
Leverage familiar project plan capabilities, like dependencies and Gantt charts, to deliver a successful cloud deployment.

Quickly respond to issues
Track and mitigate potential issues before they derail your migration.
Who should use this guide

Whether you’re strategizing at the highest levels of the organization or assessing the most minute infrastructure requirements, you’re in the right place. Common roles/titles who would benefit from this solution include:

- Chief Information Officer
- Project Manager
- IT Director
- IT Manager
- Business Analyst
- Compliance Manager
- Security Manager
- System Administrator
- Application Engineer
- Network Engineer
- Solutions Technician

Purpose

This guide is designed to help you manage the entire cloud migration process, from planning to execution. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets

Cloud Migration Solution Guide
Components

1. PLAN
   - Vendor Selection
   - Cloud Readiness
   Prepare your organization for a successful cloud deployment.

2. EXECUTE
   - Cloud Deployment Project Plan
   Leverage a robust project plan to execute your migration to the cloud.

3. TRACK
   - Issues Tracking
   Manage and mitigate potential issues that could derail your cloud deployment.

Cloud Migration Solution Guide
Vendor Selection

Finding the right service provider is critical to the success of your cloud strategy. Given the intricacies of your organization, the partner you choose must meet your company’s specific and unique requirements. With the Smartsheet's Vendor Selection sheet, you can compare and prioritize potential cloud vendors against criteria that matters most to you, resulting in more objective decision making.

A. Define your evaluation criteria to compare vendors objectively.

B. Use hierarchy to organize, collapse or expand information.

C. Easily add vendor candidates directly to the sheet or through a customizable web form.

D. Score your vendors based on objective criterion that automatically calculate into a single number.
Cloud Readiness

As businesses increasingly look to move applications and infrastructure to the cloud, IT is responsible for evaluating existing systems to determine what’s ready to migrate. For each workload, IT must thoroughly assess its entire ecosystem, including things like Internet bandwidth, application compatibility, devices, security policies and more. With Smartsheet, IT can use robust checklists to assess the readiness of each application and determine what’s next.

- Organize assessment tasks into collapsible groups using hierarchy.
- Use attachments and discussions to help ensure everyone is on the same page.
- Easily assign owners, which you can pull right from your company’s directory.
- Use symbols, like RYG balls, to quickly communicate status.
Cloud Deployment Project Plan

A lot can go wrong when moving critical business applications and sensitive data to the cloud. Smartsheet manages the end-to-end deployment effort with intuitive project plans so no detail is missed. With features like Gantt charts, task grouping, and task dependencies, IT departments can build a detailed execution plan to manage each phase while minimizing disruption to the business.

- Organize your deployment activities into phases using hierarchy.
- Set email reminders triggered by custom dates or dates in the sheet.
- Toggle to a Gantt view to see how timelines stack up.
- Create dependencies between tasks so Smartsheet can shift dates automatically when a task schedule changes.
Issues Tracking

It’s inevitable that you’ll run into issues when deploying. Smartsheet’s Issue Tracking sheet makes it easy to submit, track and address any problems. With secure sharing and real-time access from any device, your team can work collaboratively to quickly resolve and communicate the status of issues.

A: Organize issues into logical groups, like by priority.

B: Drag and drop rows to prioritize unassigned issues into the right group.

C: Securely share the sheet so everyone can work off the same list in real time.

D: Use conditional formatting to grey out tasks marked as resolved.

E: Simply the issue submission process with a web form.
Jump-Start Your Cloud Migration Efforts with Smartsheet

1. **Read through the solution guide**
   You’ve had an overview of the solution – now try Smartsheet for yourself.

2. **Sign up or log in to Smartsheet**
   Sign up at [smartsheet.com/it-ops-solutions/cloud-migration](https://smartsheet.com/it-ops-solutions/cloud-migration). You can also use this with your existing account by logging in.

3. **Open the Getting Started Sheet**
   Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

4. **Customize the sheet**
   The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

5. **Start working and sharing**
   To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
### Other Recommended Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete sheets you don’t need</td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td>Build your own sheet</td>
<td>We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.</td>
</tr>
<tr>
<td>Use the “cheat sheets” in this guide</td>
<td>To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.</td>
</tr>
</tbody>
</table>
Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - help.smartsheet.com
Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - community.smartsheet.com
Ask questions, share best practices, and get help.

**Submit your question** - solutions@smartsheet.com
Want personalized help? Our design and services teams have you covered!

**Send us your feedback** - help.smartsheet.com/customer/portal/emails/new
Share your thoughts or suggestions about Smartsheet or our Solutions.

**Plans and Pricing** - smartsheet.com/pricing
Enjoy your 30-day free trial.
**Smartsheet Cheat Sheet**

**Keyboard Shortcuts**

### Basics

- **F2 / Fn + F2**
  - Enters edit mode on selected cell

- **Ctrl + S**
  - Saves all unsaved information

- **Ctrl + Z**
  - Undo the previous action since last save

- **Ctrl + Y**
  - Redo the previous action since last save

- **Ins**
  - Inserts a row above the selected row.

To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins**.

### Formatting

- **Ctrl + Enter (or Alt + Enter)**
  - Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.

- **Ctrl + K**
  - Indents Primary Column only

- **Ctrl + M**
  - Outdents Primary Column only

- **Ctrl + I**
  - Italic

- **Ctrl + B**
  - Bold

- **Ctrl + U**
  - Underline

**NOTE:** Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.
**Formulas**

- Ctrl + L x 1 inserts $ before column name (horizontal cell reference lock).
- Ctrl + L x 2 inserts $ after column name (vertical cell reference lock).
- Ctrl + L x 3 inserts $'s around column name (full cell reference lock).

**Date Column Cells**

- t: Inserts today’s date.
- +: Enters date x days from today.
- -: Enters date x days before today.
- mon / tue / wed / etc... inserts date of the current week’s Monday, Tuesday, Wednesday, etc.
- yes: Inserts yesterday’s date.
- tom: Inserts tomorrow’s date.
- next week: Inserts date seven days from today.
- last week: Inserts date from seven days ago.
- Dec 15 / Jan 3 / etc: Inserts date of string entered.

**Additional**

- Ctrl + / Displays the Open a Sheet form.
- Ctrl + G Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- Home Takes you to the first cell of the row you are currently on.
- Ctrl + Home Takes you to the top left cell of your sheet.
- End Takes you to the last cell of the row you are currently on.
- Ctrl + End Takes you to the bottom right cell of your sheet.
- Pg Up Moves you up in your sheet.
- Pg Dn Moves you down in your sheet.
- Space Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article.
### Numeric Formulas

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUM()</strong></td>
<td>Adds selected values, or a range of cells.</td>
<td>=SUM(Cost1: Cost5)</td>
<td>1125.75</td>
</tr>
<tr>
<td><strong>AVG()</strong></td>
<td>Averages selected values, or a range of cells.</td>
<td>=AVG(Cost1: Cost5)</td>
<td>225.15</td>
</tr>
<tr>
<td><strong>MAX()</strong></td>
<td>Returns the highest numeric value, or latest date.</td>
<td>=MAX(Cost1: Cost5)</td>
<td>425.75</td>
</tr>
<tr>
<td><strong>MIN()</strong></td>
<td>Returns the lowest numeric value, or earliest date.</td>
<td>=MIN(Cost1: Cost5)</td>
<td>100</td>
</tr>
<tr>
<td><strong>INT()</strong></td>
<td>Returns the integer portion of a given number.</td>
<td>=INT(Cost5)</td>
<td>425</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ROUND()</strong></td>
<td>Rounds a given number to the desired # of digits.</td>
<td>=ROUND(Cost5, 1)</td>
<td>425.8</td>
</tr>
<tr>
<td><strong>ABS()</strong></td>
<td>Returns the absolute value of a given number.</td>
<td>=ABS(-85)</td>
<td>85</td>
</tr>
<tr>
<td><strong>COUNT()</strong></td>
<td>Counts non-blank cells in a given range.</td>
<td>=COUNT([Task Name]:[Task Name])</td>
<td>5</td>
</tr>
<tr>
<td><strong>LEN()</strong></td>
<td>Returns the number of characters (length) in a given cell.</td>
<td>=LEN([Task Name]5)</td>
<td>6</td>
</tr>
</tbody>
</table>

*NOTE: Formatting/currency values aren’t included. Dates have a length of 5.*
Logic Formulas

**IF()**: Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

**Syntax**: IF(logical_test, value_if_true, value_if_false)

**Example**: =IF([Due Date]1 > [Due Date]2, “Date 1 is Larger”, “Date 2 is Larger”)

**Result**: Date 2 is Larger

**ISBLANK()**: Used within an IF formula to test if a cell is blank.

**Example**: =IF(ISBLANK([Task Name]1), “Cell is blank”, “Cell isn’t blank”)

**Result**: Cell isn’t blank

**ISTEXT()**: used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

**Example**: =IF(ISTEXT([Due Date]1), “Cell is text”, “Cell isn’t text”)

**Result**: Cell isn’t text

**ISNUMBER()**: Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

**Example**: =IF(ISNUMBER([Task Name]1), “Cell is a number”, “Cell isn’t a number”)

**Result**: Cell isn’t a number

**ISDATE()**: Used in an IF formula to test if a cell contains a date.

**Example**: =IF(ISDATE([Due Date]1), “Cell is a date”, “Cell isn’t a date”)

**Result**: Cell is a date

**ISBOOLEAN()**: Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

**Example**: =IF(ISBOOLEAN(Done1), “Cell is a boolean”, “Cell isn’t a boolean”)

**Result**: Cell is a Boolean
Smartsheet Cheat Sheet
Formulas

Logic Formulas (cont.)

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

- **Syntax:** `AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)
- **Example:** `=IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")`
- **Result:** Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

- **Syntax:** `NOT(Done1)`
- **Example:** `=IF(NOT(Done1), "Task A Not Complete", "Task A Complete")`
- **Result:** Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

- **Syntax:** `OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)`
- **Example:** `=IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")`
- **Result:** Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

- **Syntax:** `IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))`
- **Example:** `=IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))`
- **Result:** This is Task A
Additional Formulas and Help

Formula Basics - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

Text Formulas - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

Date Formulas - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

Advanced Formulas - smartsheet.com/date-formulas
Weighted average, prorate, countif, countifs, sumif, sumifs

Using Hierarchy in Formulas - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

Formula Error Messages - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot