About PMO Core Functions

Great project outcomes depend on a lot of things – and a PMO (Program Management Office) that nurtures projects with the right level of functional support is an important one of them. In this guide we show how PMOs can use Smartsheet to identify and mitigate risk, ensure that project requirements map to business goals, and how to control proposed changes to project scopes and schedules.

Report on key project information in real time
Give stakeholders a high-level view of project status and progress.

Mitigate the impact of issues and risks
Identify risk probability and assess impact so you can allocate resources accordingly.

Manage requirements to deliver business value
Establish criteria and specifications so teams stay focused on meeting objectives.

Control end-to-end change processes
Easily submit project change requests so decision makers can take swift action.
Who should use this guide?

Whether you’re a new project manager on a small project or a seasoned Project Management Professional overseeing a complex portfolio of projects, you’re in the right place.

Common roles/titles who would benefit from this solution include:

- Program Managers
- Project Managers
- Business Analysts
- Requirements Analysts
- Specification Writers
- Technical Architects
- QA Teams
- Project Coordinators
- Project Consultants

What You’ll Learn

This guide is designed to show you how you can build and execute on world-class PMO processes with Smartsheet. 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
Components

1. **ALIGN**
   - Business Requirement
   - Master Requirements List
   - Function Requirement
   - Define, document and map requirements to business goals.

2. **MITIGATE**
   - Issue and Risk Dashboard
   - Risk Assessment and Tracking
   - Risk Mitigation Plan
   - Issue Tracker
   - Identify risks, develop mitigation plans, and offer stakeholders real-time views.

3. **CONTROL**
   - Change Requests
   - Give your project stakeholders a way to request changes so you can take action.

PMO Core Functions Solution Guide
Focused, detailed business requirements are critical to the success of any project. They are often the ‘driver’ of the project’s success. Documenting your business requirements in Smartsheet helps ensure that you think through and document the relevant details in a form that can be easily shared and updated to stay consistent.

- Use hierarchy to organize inputs into logical sections.
- Link directly to project plans so people can dig into the details.
- Save the sheet as a template so others can document requirements in a consistent format.
- Use the structure in this template to guide your inputs – it’s built on details that project management experts recommend you capture.
Functional Requirement (with Use Cases)

A functional requirement describes how something should work in order to realize a business objective. Many people, especially those who are new to the task, get confused about what to write. Smartsheet’s Functional Requirement sheet clears up the confusion by giving people an ideal structure to follow that includes use cases, the best way to bring actual scenarios to life.

A. Securely share your sheet in real time.
B. Attach diagrams or any other type of supporting documentation.
C. Ensure people have the latest documents with built-in document version control
D. Smartsheet’s global search makes it easy to locate specific requirements.

PMO Core Functions Solution Guide
Master Requirements List

Because projects are always changing, keeping an up-to-date list of requirements is one of the biggest challenges for project managers. Smartsheet is the perfect place to keep your requirements list because you can document and update how requirements map to business objectives through. Need to see how a test scenario or change request rolls up to a functional or business requirement? Smartsheet has you covered.

- **Link to other requirement documents so when things change, they change in both places.**
- **Use hierarchy to group requirements or change requests to see work being done on a high level.**
- **Filter any column for a focused view on a requirement and the bigger requirement that it rolls up to.**
- **Communicate progress with simple checkboxes as requirements go through various phases.**
Managing a project involves dozens of moving parts – people, tasks, dependencies, deadlines, and more. With so much going on, it can be easy to lose sight of potential problems. Left unresolved, these seemingly small issues can delay your entire project and affect deliverables. With the Issue Tracker and Issue Reporting Form, you can quickly identify issues, assign owners, attach screenshots, and meet deadlines.

A. Use RYG symbols to quickly display issue status at a glance.

B. Attach screenshots to help the QA team understand the issue.

C. Simply drag and drop rows to the appropriate priority level.

D. Trigger email reminders before due dates to stay on track.

E. Give your team a fast way to log new issues through a fully customizable web form.
Risk Assessment and Tracking

Projects are constantly changing – they are unpredictable, volatile, and more complex every day. By their very nature, projects are full of hidden risks. Identifying risks early in your project can be the difference between a costly issue and a high-quality deliverable. Smartsheet gives your team a way to report risks and assess their impact, so your project stays on time and on budget.

A Use conditional formatting to highlight the most likely, critical risks in red.

B Have discussions directly in the sheet to centralize communication and add context.

C Schedule automatic recurring update requests to risk owners so they never forget to update their items.

D Easily identify and submit risks with a customizable web form.
Risk Mitigation Plan

Project managers put out a lot of fires, but you can only do so much. By focusing on prevention, you can spend less time dealing with last-minute problems and more time reducing the impact. Create an action plan for mitigating risks if they move to real problems – identify triggers, assign ownership, and clarify due dates. This way, everyone will be on the same page should a problem arise.

A Use cell linking to include the risks you’ve already identified in the Risk Tracker.

B Set notifications, delivered right to the inbox, so everyone knows when something changes in the sheet.

C Schedule reminders three days before due date so your team can meet deadlines.

D Give everyone access to a real-time plan by securely publishing the sheet to a private intranet or a public web page.
**Issue & Risk Dashboard**

Good communication is essential for any effective risk management strategy. You need to keep stakeholders updated on how issues and risks are progressing, but you don't want to show the nitty-gritty. Smartsheet provides a high-level view of progress and due dates in real time. As information is updated in your other sheets, your dashboard will also be updated to reflect the latest status.

- **A** Easily pull information from others sheets into a single report. Changes made in the report will reflect in the source sheets as well.
- **B** Schedule automatic, weekly emails to send the updated dashboard to stakeholders.
- **C** Control who can access, view, or edit your dashboard.
- **D** Turn on the “Highlight Changes” feature so you can easily track changing information.
- **E** Customize your dashboard with the Report Builder and choose which information to highlight.
Change Requests

Even with the best planning possible, change is still inevitable. Project schedules may need to shift, budgets may increase or deliverables may need to be redefined. Smartsheet helps the end-to-end change control process. With custom web forms, project teams can easily submit their requests and decision makers can then see all requests in a single sheet.

A Use auto-numbering to give requests unique identifiers or to stamp submission dates.

B Simplify navigation with conditional formatting, like formatting text red or green to see what’s been rejected or approved.

C Create a simple web form for your project teams to make their requests.

D Send an update request, complete with a link directly to the sheet, to make it easy for stakeholders to make edits.

E Add consistency to your taxonomy with customizable drop-downs.
Jumpstart your PMO with Smartsheet

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read through the solution guide</td>
<td>You’ve had an overview of the solution – now try Smartsheet for yourself.</td>
</tr>
<tr>
<td>Sign up or log in to Smartsheet</td>
<td>Sign up at <a href="http://smartsheet.com/pm-solutions/pmo-core-functions">smartsheet.com/pm-solutions/pmo-core-functions</a> You can also use this with your existing account by logging in.</td>
</tr>
<tr>
<td>Open the Getting Started Sheet</td>
<td>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.</td>
</tr>
<tr>
<td>Customize the sheet</td>
<td>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.</td>
</tr>
<tr>
<td>Start working and sharing</td>
<td>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.</td>
</tr>
</tbody>
</table>
## 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

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2</td>
<td>Enters edit mode on selected cell</td>
</tr>
<tr>
<td>Fn + F2</td>
<td></td>
</tr>
<tr>
<td>Ctrl + S</td>
<td>Saves all unsaved information</td>
</tr>
<tr>
<td>Ctrl + Z</td>
<td>Undo the previous action since last save</td>
</tr>
<tr>
<td>Ctrl + Y</td>
<td>Redo the previous action since last save</td>
</tr>
<tr>
<td>Ins</td>
<td>Inserts a row above the selected row.</td>
</tr>
</tbody>
</table>

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

Inserts $ before column name (horizontal cell reference lock).

Inserts $ after column name (vertical cell reference lock).

Inserts $’s around column name (full cell reference lock).

Date Column Cells

<table>
<thead>
<tr>
<th>Key</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>t</td>
<td>Inserts today’s date.</td>
</tr>
<tr>
<td>+</td>
<td>Enters date x days from today.</td>
</tr>
<tr>
<td>-</td>
<td>Enters date x days before today.</td>
</tr>
<tr>
<td>mon / tue / wed / etc...</td>
<td>Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.</td>
</tr>
<tr>
<td>yes</td>
<td>Inserts yesterday’s date.</td>
</tr>
<tr>
<td>tom</td>
<td>Inserts tomorrow’s date.</td>
</tr>
<tr>
<td>next week</td>
<td>Inserts date seven days from today.</td>
</tr>
<tr>
<td>last week</td>
<td>Inserts date from seven days ago.</td>
</tr>
<tr>
<td>Dec 15 / Jan 3 / etc</td>
<td>Inserts date of string entered.</td>
</tr>
</tbody>
</table>

Additional

Displays the Open a Sheet form.

Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.

Takes you to the top left cell of your sheet.

Takes you to the bottom right cell of your sheet.

Moves you up in your sheet.

Moves you down in your sheet.

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>: Adds selected values, or a range of cells.</td>
<td>Example: =SUM(Cost1: Cost5)</td>
<td>Result: 1125.75</td>
<td></td>
</tr>
<tr>
<td><strong>AVG()</strong>: Averages selected values, or a range of cells.</td>
<td>Example: =AVG(Cost1: Cost5)</td>
<td>Result: 225.15</td>
<td></td>
</tr>
<tr>
<td><strong>MAX()</strong>: Returns the highest numeric value, or latest date.</td>
<td>Example: =MAX(Cost1: Cost5)</td>
<td>Result: 425.75</td>
<td></td>
</tr>
<tr>
<td><strong>MIN()</strong>: Returns the lowest numeric value, or earliest date.</td>
<td>Example: =MIN(Cost1: Cost5)</td>
<td>Result: 100</td>
<td></td>
</tr>
<tr>
<td><strong>INT()</strong>: Returns the integer portion of a given number.</td>
<td>Example: =INT(Cost5)</td>
<td>Result: 425</td>
<td></td>
</tr>
<tr>
<td><strong>ROUND()</strong>: Rounds a given number to the desired # of digits.</td>
<td>Syntax: ROUND(cell1, #_of_digits) Example: =ROUND(Cost5, 1)</td>
<td>Result: 425.8</td>
<td></td>
</tr>
<tr>
<td><strong>ABS()</strong>: Returns the absolute value of a given number.</td>
<td>Example: =ABS(-85)</td>
<td>Result: 85</td>
<td></td>
</tr>
<tr>
<td><strong>COUNT()</strong>: Counts non-blank cells in a given range.</td>
<td>Example: =COUNT([Task Name]:[Task Name])</td>
<td>Result: 5</td>
<td></td>
</tr>
<tr>
<td><strong>LEN()</strong>: Returns the number of characters (length) in a given cell.</td>
<td>Example: =LEN([Task Name])</td>
<td>Result: 6NOTE: Formatting/currency values aren’t included. Dates have a length of 5.</td>
<td></td>
</tr>
</tbody>
</table>
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
**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