Solution Guide
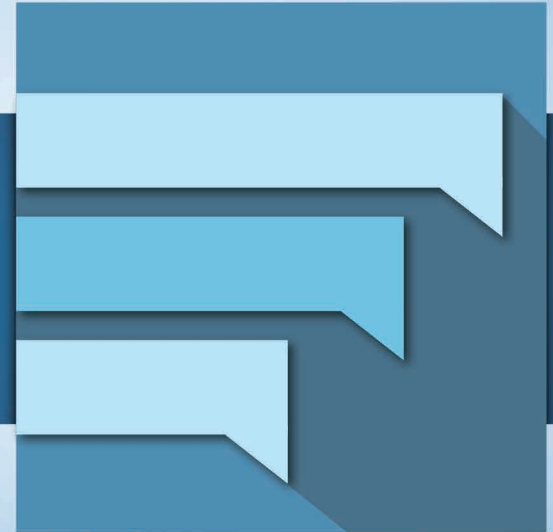PROJECT .01

Program Management Office

Find it online: smartsheet.com/pm-solutions/program-management-office

smart**sheet**

Coordinate **Anything**

About Program Management Office

Great program management gives project managers the mandates, structures, tools and communication channels they need to ensure successful project outcomes. This guide is built to help you get started with Smartsheet to achieve your program management.

Control program costs and boost efficiency
Implement the best project management processes to deliver projects on time and on budget.

Drive accountability and transparency
Ensure everyone knows who is doing what and understands the overall project goals.

Streamline cross-team communication
Share information with the right teams, in real time.

Maximize chances of project success
Automate your workflows and processes so your team can spend time focusing on deliverables.

Program Management Office Solution Guide

Who should use this guide?

Whether you're building new program management capabilities or seeking ways to improve your current ones, you're in the right place.

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

Program Managers

Project Managers

Business Analysts

Business Consultants

Subject Matter Experts

Operations Managers

Operations Specialists

What You'll Learn

This guide is designed to show you how you can build and run world-class program management processes with Smartsheet. We have a wealth of specific how-to resources in our Help Center, so this guide covers:

1 An overview of the solution

2 A tour of the individual sheets

3 How to get going

4 Helpful resources and cheat sheets

→

Program Management Office Solution Guide

Components

1 INITIATE

Program Management Office Charter

Program Governance Structure

Document the foundational elements for successful project oversight.

2 PLAN

Roles & Responsibilities

Business Case

Articulate who is going to do what, and when.

3 COMMUNICATE

Program Master Calendar

Project Portfolio Scorecard

Continuously share critical project information and success metrics.

Program Management Office **Solution Guide**

Program Management Office (PMO) Charter

Charters are an important first step in launching a new Project Management Office.
A good charter not only establishes the scope, goals, and budget of the PMO but also stimulates discussion to build consensus across all stakeholders. With rich discussion, collaboration and sharing capabilities, Smartsheet is the perfect tool to help structure people's contributions.

A Link to supporting information – whether in another sheet, a document, or on the internet.

B Use the structure in this charter template to ensure that you think through all aspects of the program such as PMO objectives, performance measures and project delivery frameworks.

C Have discussions within the charter to keep comments and suggestions in context.

D Simple and secure sharing lets you decide who can view and edit the charter.

A Drive transparency by attaching supporting documentation, like meeting minutes.

B Securely share the sheet so everyone has access to the latest information.

C Explain the purpose of each governance team so project stakeholders can understand how decisions are made.

D Use hierarchy to expand and collapse groups for easy navigation.

Program Governance

Documenting a program's governance structure helps stakeholders understand approved methodologies, delivery frameworks and the context for how decisions are made. Without it, stakeholders may not understand how to engage with a PMO, deliver projects and or even understand why some projects exist at all. Smartsheet is ideal for keeping a record of your program's governance information because it's easy to update, share and make available in real-time.

Business Case

A good business case is credible and compelling. This requires authors to thoughtfully articulate a lot of information -- the project goals, issues, recommended approach, costs, benefits, risks, constraints and assumptions. Smartsheet gives you and your co-authors an ideal business case structure to follow, the ability to collaborate in real time, and enables you to keep a log of changes as the business case evolves.

A View the change history of any cell to keep a historical record of who changed what and when.

B Link your Business Case to other sheets with supporting material, such as the Roles & Responsibilities sheet.

C Skip the email back-and-forth, and have discussions within Smartsheet.

D Easily share the sheet so everyone always works from the latest version.

E Use hierarchy to easily organize the structure and layout.

A Keep your notes and discussions within Smartsheet so the information is always available and in context.

B Easily share with others so everyone knows who owns what.

C Built-in "Send Update Request" functionality makes it easy to collect the latest information.

D Set up alerts to be automatically notified when anything changes.

E Customized drop-down menus make it easy to conform to the framework.

Roles & Responsibilities (RACI)

The RACI framework allows project managers to document who is Responsible, Accountable, Consulted and Informed (or RACI). Understanding how people are involved in an initiative is extremely valuable when there's a need for increased integration and collaboration. Smartsheet is the perfect tool for your RACI matrix because it's easy to update, simple to share, and available in real time.

Program Master Calendar

Any program manager will tell you that it is a challenge to maintain a calendar to communicate milestones and important meetings across multiple projects. Smartsheet's Program Master Calendar helps you keep items up to date, share the latest schedule with stakeholders, request updated timelines, and set up email notifications so nothing is missed.

A Organize and track all important milestones and meeting dates in one central location.

B Flag items, like major milestone, to call attention to the most important dates.

C Set up custom notifications to be alerted if anything changes. Or set reminders so you don't miss anything.

D Toggle to a traditional calendar view. Color code items for easy visual reference.

E Publish the calendar to securely share with all of the stakeholders.

A Get out of the inbox and send update requests through Smartsheet.

B Track key performance metrics across the project portfolio.

C Use RYG symbols to visually indicate performance

D Use hierarchy to group performance measure by project.

E Keep a historical record of your scorecards by creating a new sheet for each review period.

Project Portfolio Scorecard

Collecting and reporting on performance from multiple project teams is time-consuming and tedious work. Smartsheet helps you streamline the entire process. With built-in update request features, project owners can be automatically notified to make updates on a recurring or ad-hoc schedule.

Jump-Start Your Program Management Office with Smartsheet

Read through the solution guide

You've had an overview of the solution – now try Smartsheet for yourself.

Sign up or log in to Smartsheet

Sign up at **smartsheet.com/pm-solutions/program-management-office** You can also use this with your existing account by logging in.

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.

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.

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.

Program Management Office Solution Guide

Other Recommended Steps

◯	**Delete sheets you don't need**	Deleting a sheet is easy! You can learn how to [here]().
◯	**Build your own sheet**	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.
◯	**Use the "cheat sheets" in this guide**	To help you get the most out of Smartsheet, we've included cheat sheets for formulas and shortcuts at the end of this guide.

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.

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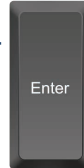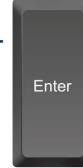
To insert multiple rows at once, press **Shift**
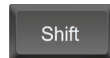
and select multiple row headers, then click **Ins** .

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** + **D**   Fill down *(also available by dragging cell corner)*

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).

x 2 Inserts **$** after column name (vertical cell reference lock).

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 are 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.

Smartsheet Cheat Sheet
Formulas

Numeric Formulas

SUM(): Adds selected values, or a range of cells.
>Example: =SUM(Cost1: Cost5)
>Result: 1125.75

AVG(): Averages selected values, or a range of cells.
>Example: =AVG(Cost1: Cost5)
>Result: 225.15

MAX(): Returns the highest numeric value, or latest date.
>Example: =MAX(Cost1: Cost5)
>Result: 425.75

MIN(): Returns the lowest numeric value, or earliest date.
>Example: =MIN(Cost1: Cost5)
>Result: 100

INT(): Returns the integer portion of a given number.
>Example: =INT(Cost5)
>Result: 425

ROUND(): Rounds a given number to the desired # of digits.
>Syntax: ROUND(cell1, #_of_digits)
>Example: =ROUND(Cost5, 1)
>Result: 425.8

ABS(): Returns the absolute value of a given number.
>Example: =ABS(-85)
>Result: 85

COUNT(): Counts non-blank cells in a given range.
>Example: =COUNT([Task Name]:[Task Name])
>Result: 5

LEN(): Returns the number of characters (length) in a given cell.
>Example: =LEN([Task Name]5)
>Result: 6NOTE: 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, countif s, sumif, sumif s

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

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