Solution Guide
PROJECT .05

Project Portfolio Rollup

Find it online: smartsheet.com/pm-solutions/project-portfolio-rollup
Project Portfolio Rollup

Keeping a pulse on a single project, let alone an entire portfolio of projects, is daunting for even the most seasoned project managers. Smartsheet makes things easier by giving you the ability to effortlessly roll up key project information like status, progress, risk and timelines, so your project stakeholders have a real-time window into activity. This guide is designed to help you use Smartsheet to roll up project information across your portfolio.

Simplify project portfolio reporting
Track the big picture and dive into operational details, all without additional asks of your project managers.

Offer real-time self-service reports
Easily surface issues or risks by setting up reports to be delivered on a periodic basis.

Monitor project status and trends
Compare KPIs like quality index, client satisfaction rating and budget performance across projects.

See project timelines in a single view
Provide a rollup timeline view of all your projects so that you can easily identify conflicts and resource constraints.
Who should use this guide?

Whether you’re overseeing a few projects or an entire portfolio of projects, you’re in the right place.

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

- Project Portfolio Managers
- 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 use Smartsheet to roll up key project information for stakeholders to view in real time.

This guide will cover the following:

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. COORDINATE**

*Portfolio Master Calendar*

Organize project timelines into a single calendar rollup to identify conflicts and resource constraints.

**2. EVALUATE**

*Portfolio Risk Tracker*
*Portfolio Scorecard*

Evaluate performance and manage and mitigate risk across your portfolio.

**3. REPORT**

*Portfolio Master List*
*Portfolio Milestone Rollup*

Share comprehensive portfolio information to your stakeholders.
Portfolio Master Calendar

Intertwined dependencies and potential resource conflicts make managing multiple projects a juggling act. Smartsheet’s Portfolio Master Calendar helps you assess the health of your projects so you can make informed decisions on resourcing, keep clients and stakeholders informed, and ultimately maximize the impact of your project portfolio.

**Setup a report that pulls project calendar information from multiple project plans.**

**Include important project information like Project Status and ‘Path to Green’ if the project is not on track.**

**Show how schedules stack up across the portfolio.**

**Add status symbols to your timelines to show how each project is doing.**

### Project Portfolio Rollup Solution Guide
Coordinating different projects can feel like you are constantly checking your blind spots. Smartsheet’s Portfolio Risk Tracker is your go-to place to see risks across different projects and the mitigation plan for each. For project managers, flagging a risk is as simple as one click. For portfolio managers, a periodic report gives them the confidence that they are on top of their projects.

A. Set up a report that pulls risk information from multiple project plans.
B. Surface an activity in the Risk Tracker byflagging it as ‘At Risk’ in its Project Plan.
C. Include information on how to mitigate the risk and get the project on a “path to green” status.
D. Send risk reports as PDFs or Excel spreadsheets directly from Smartsheet.
E. Set recurring reports on a regular, customizable cadence.
Portfolio Scorecard

Project managers need to constantly balance the big picture against the details. Smartsheet’s Portfolio Scorecard helps compare the health of different projects in your portfolio and direct action and resources where it’s needed the most. Project managers can also write a short sentence on project status giving executives color commentary that complements project KPIs.

Set up a report that pulls project health information from multiple project sheets. (A)
Link to the underlying sheet for more project information. (B)
Compare key KPIs across your portfolio – quality index, client satisfaction rating or performance against budget. (C)
Let executives submit questions or feedback for the entire team which in turn gets displayed in the respective project plan. (D)
Enter a short status update in your Project Plan; the report will automatically update to show the latest. (E)
Portfolio Master List

While the Portfolio Scorecard gives you the big picture, the Portfolio Master provides all the details for smooth operations. Smartsheet’s Portfolio Master List keeps everyone accountable, monitors project movement through the pipeline, and drives relentless focus on tracking open issues and propelling them to closure.

- Link to the underlying project sheets to dig into details of the project.
- Pull in data, like issue counts, from other sheets. Click through to the Issue Tracker to track the minutiae.
- Show clear accountability by assigning tasks to specific people.
- Visually represent progression as projects advance through phases.
- Send automatic notifications to project stakeholders when key stages are cleared.
Portfolio Milestone Rollup

Tracking milestones ensures you catch a fire before it’s too late. But with many projects and many more milestones, keeping everything straight can be a challenge. Smartsheet’s Portfolio Milestone Rollup guarantees that milestones across all your projects get automatically tracked and issues get discussed early, before resulting in project delays.

- **Link to detailed plans for status of project activities as well as key KPIs.**
- **Use cell linking to automatically pull milestone information like dates, milestone type and project team updates from detailed plan.**
- **Set up reminders to automatically notify project managers before a milestone is due.**
- **Log feedback and action items while reviewing project status.**
- **Share this report with clients for full transparency on status of project milestones.**
## Jump-Start Your Project Portfolio 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/project-portfolio-rollup">smartsheet.com/pm-solutions/project-portfolio-rollup</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>Option</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

- **Alt** + **Enter**: (or) **Ctrl** + **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

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

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

$\text{Ctrl} + \text{L} \times 1$ \quad \text{Inserts $ before column name (horizontal cell reference lock).}

$\times 2$ \quad \text{Inserts $ after column name (vertical cell reference lock).}

$\times 3$ \quad \text{Inserts $'s around column name (full cell reference lock).}

Date Column Cells

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

Additional

$\text{Ctrl} + /$ \quad \text{Displays the Open a Sheet form.}

$\text{Ctrl} + G$ \quad \text{Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.}

$\text{Home}$ \quad \text{Takes you to the first cell of the row you are currently on.}

$\text{Ctrl} + \text{Home}$ \quad \text{Takes you to the top left cell of your sheet.}

$\text{End}$ \quad \text{Takes you to the last cell of the row you are currently on.}

$\text{Ctrl} + \text{End}$ \quad \text{Takes you to the bottom right cell of your sheet.}

$\text{Pg Up}$ \quad \text{Moves you up in your sheet.}

$\text{Pg Dn}$ \quad \text{Moves you down in your sheet.}

$\text{Space}$ \quad \text{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: 6
  - NOTE: Formatting/currency values aren’t included. Dates have a length of 5.
### Logic Formulas

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Syntax</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IF()</strong></td>
<td>Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.</td>
<td><code>IF(logical_test, value_if_true, value_if_false)</code></td>
<td>=IF([Due Date]1 &gt; [Due Date]2, &quot;Date 1 is Larger&quot;, &quot;Date 2 is Larger&quot;)</td>
<td>Date 2 is Larger</td>
</tr>
<tr>
<td><strong>ISBLANK()</strong></td>
<td>Used within an IF formula to test if a cell is blank.</td>
<td><code>IF(ISBLANK([Task Name]1), &quot;Cell is blank&quot;, &quot;Cell isn’t blank&quot;)</code></td>
<td>=IF(ISBLANK([Task Name]1), &quot;Cell is blank&quot;, &quot;Cell isn’t blank&quot;)</td>
<td>Cell isn’t blank</td>
</tr>
<tr>
<td><strong>ISTEXT()</strong></td>
<td>Used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).</td>
<td><code>IF(ISTEXT([Due Date]1), &quot;Cell is text&quot;, &quot;Cell isn’t text&quot;)</code></td>
<td>=IF(ISTEXT([Due Date]1), &quot;Cell is text&quot;, &quot;Cell isn’t text&quot;)</td>
<td>Cell isn’t text</td>
</tr>
<tr>
<td><strong>ISNUMBER()</strong></td>
<td>Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).</td>
<td><code>IF(ISNUMBER([Task Name]1), &quot;Cell is a number&quot;, &quot;Cell isn’t a number&quot;)</code></td>
<td>=IF(ISNUMBER([Task Name]1), &quot;Cell is a number&quot;, &quot;Cell isn’t a number&quot;)</td>
<td>Cell isn’t a number</td>
</tr>
<tr>
<td><strong>ISDATE()</strong></td>
<td>Used in an IF formula to test if a cell contains a date.</td>
<td><code>IF(ISDATE([Due Date]1), &quot;Cell is a date&quot;, &quot;Cell isn’t a date&quot;)</code></td>
<td>=IF(ISDATE([Due Date]1), &quot;Cell is a date&quot;, &quot;Cell isn’t a date&quot;)</td>
<td>Cell is a date</td>
</tr>
<tr>
<td><strong>ISBOOLEAN()</strong></td>
<td>Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).</td>
<td><code>IF(ISBOOLEAN(Done1), &quot;Cell is a boolean&quot;, &quot;Cell isn’t a boolean&quot;)</code></td>
<td>=IF(ISBOOLEAN(Done1), &quot;Cell is a boolean&quot;, &quot;Cell isn’t a boolean&quot;)</td>
<td>Cell is a Boolean</td>
</tr>
</tbody>
</table>
**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