Learning Objectives

At the end of this session you will be able to:

- **Maximize efficiency of your formulas in Smartsheet**

- **Make automation formulas more powerful**

- **Leverage formulas to run unique and dynamic reports**

Agenda

- **Hierarchy functions**

- **Specialty functions**

- **Error handling**

- **Automation for smarter reports**

Assumptions
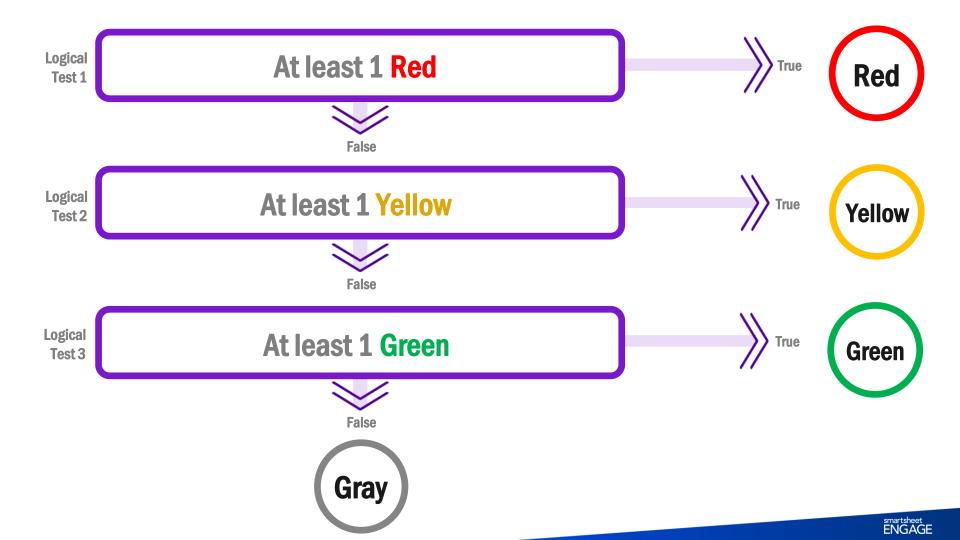
You have…

- Written formulas in Smartsheet or other spreadsheet applications

- Used the CHILDREN() function

- Seen or used logic functions like COUNTIF()

- Automated a Symbols column with IF() or nested IF() statements

- Comfortably used Help material to guide you through using functions

Hierarchy & Specialty Functions
CHILDREN(), ANCESTORS(), PARENT(),
   @row

smartsheet
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CHILDREN()

Opportunity	Total Value	Status Notes
− **Western Region**		
− **Lance**	**$33,039**	
Braun-Schulist Inc	$8,951	
Metz LLC	$5,673	
Wintheiser and Sons	$2,654	
Reynolds LLC	$1,897	
Gleichner Inc	$5,916	
Frami Group	$7,947	
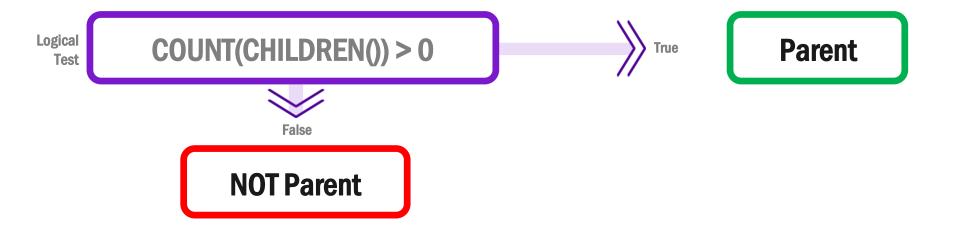
ANCESTORS()
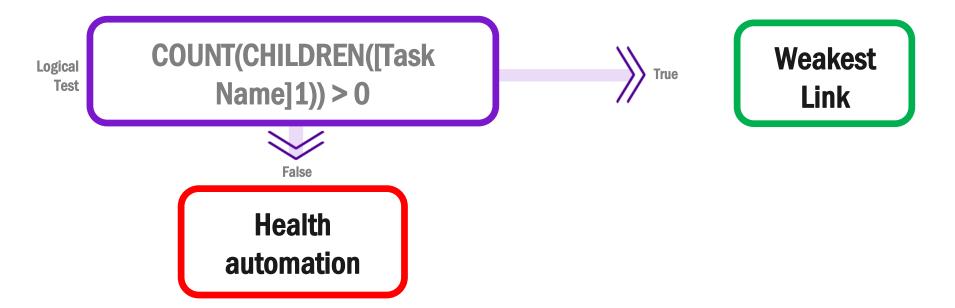
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How do we know if a row is a Parent?

Logical Test

COUNT(CHILDREN()) > 0

True → **Parent**

False → **NOT Parent**

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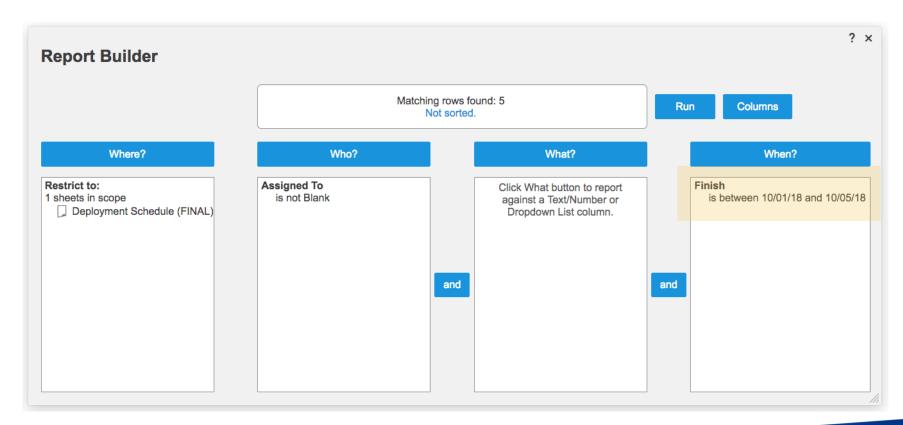
Comprehensive Health Formula

Logical
Test

COUNT(CHILDREN([Task Name]1)) > 0

True

Weakest Link

False

Health automation

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Automation for Smarter Reports

JOIN(), WEEKNUMBER(), TODAY()

Date Criteria

Report Builder

Matching rows found: 5
Not sorted.

Run   Columns

Where?	Who?	What?	When?

Restrict to:
1 sheets in scope
   Deployment Schedule (FINAL)
	Assigned To
	   is not Blank
		Click What button to report against a Text/Number or Dropdown List column.	**Finish**
			   is between 10/01/18 and 10/05/18

and

and

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Recap

- Maximize efficiency of your formulas in Smartsheet

- Make automation formulas more powerful

- Leverage formulas to run unique and dynamic reports

Smartsheet Resources

Solution Center:
"Smartsheet Formula Examples" template

Help and Learning Center:
help.smartsheet.com

Smartsheet Community:
community.smartsheet.com

Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Smartsheet Fundamentals II booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more