

smartsheet ENGAGE /

Become a Workflow
Design Expert



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Product Marketing Manager

#SmartsheetENGAGE

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Learning Objectives

- **Learn 4 tips for designing solutions before you start building**
- **Learn how to architect solutions in Smartsheet by connecting multiple capabilities and components**
- **Learn from examples of sample workflows**

Before you Start

4 tips for designing solutions



Process

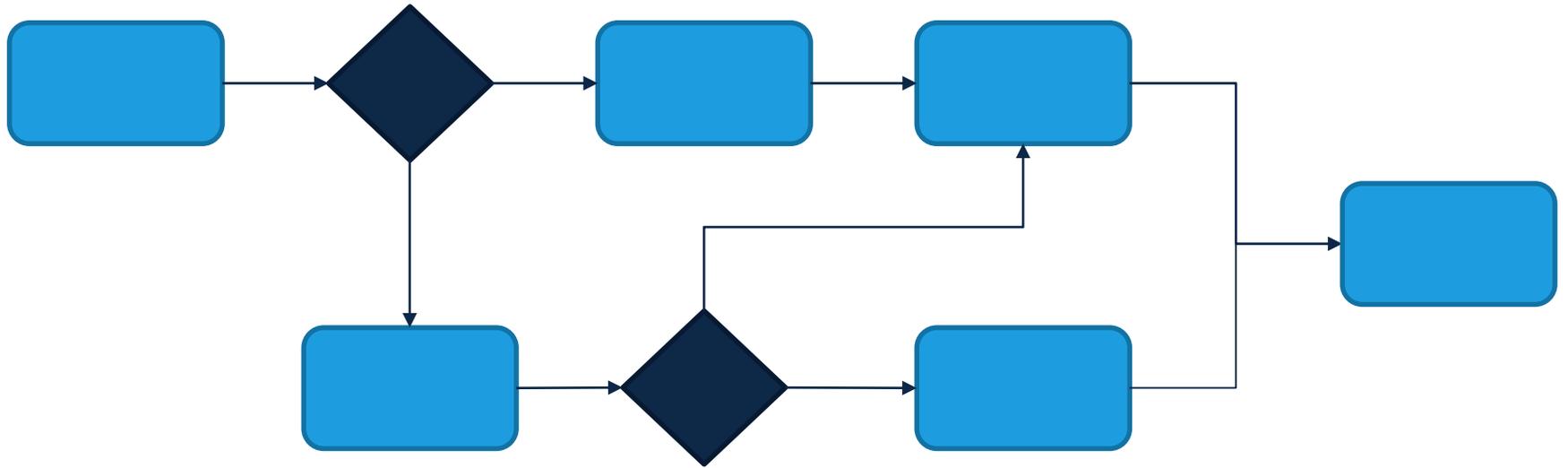
Goals

Roles

Visibility

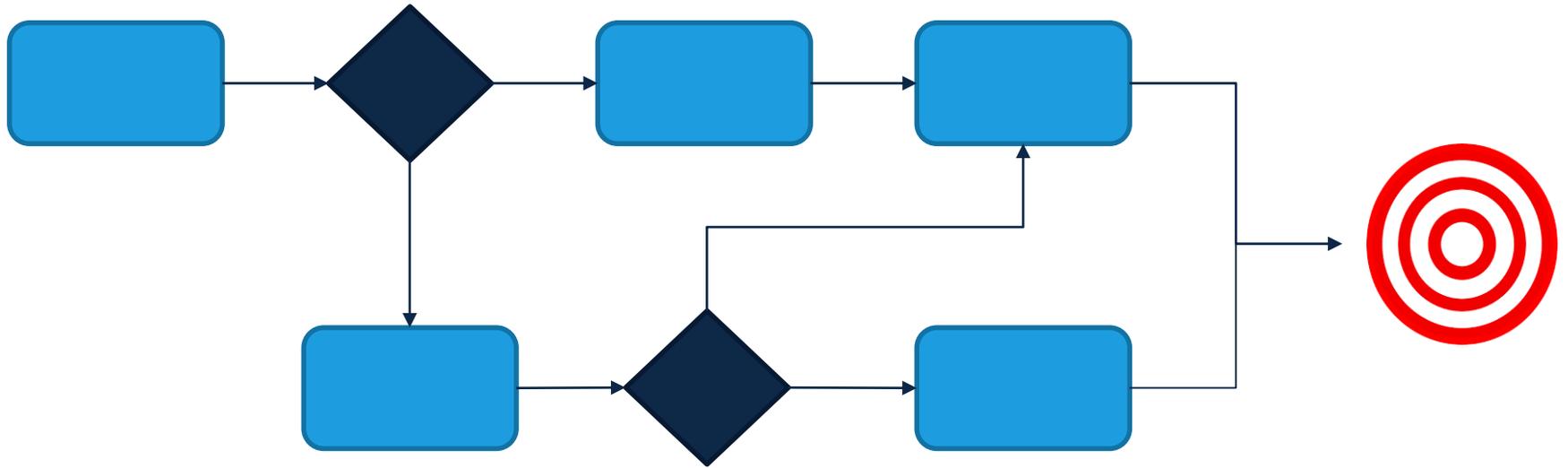
Process

Definition: A series of actions or steps taken in order to achieve a particular end.



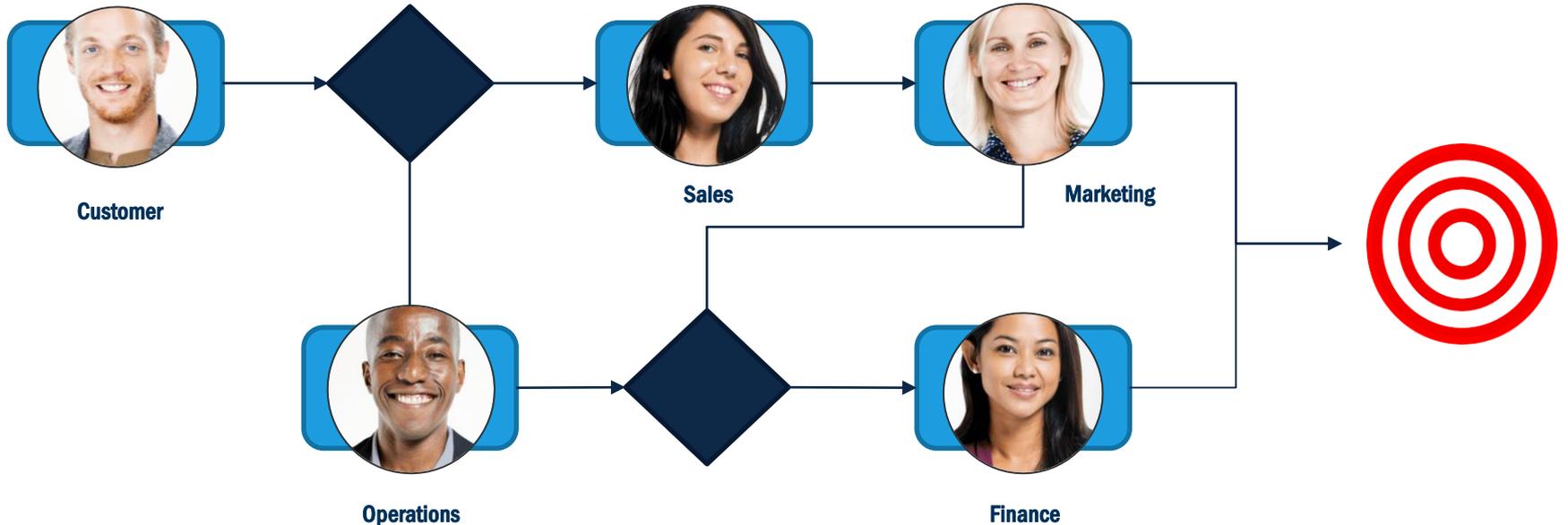
Goals

The result or achievement toward which your process effort is directed



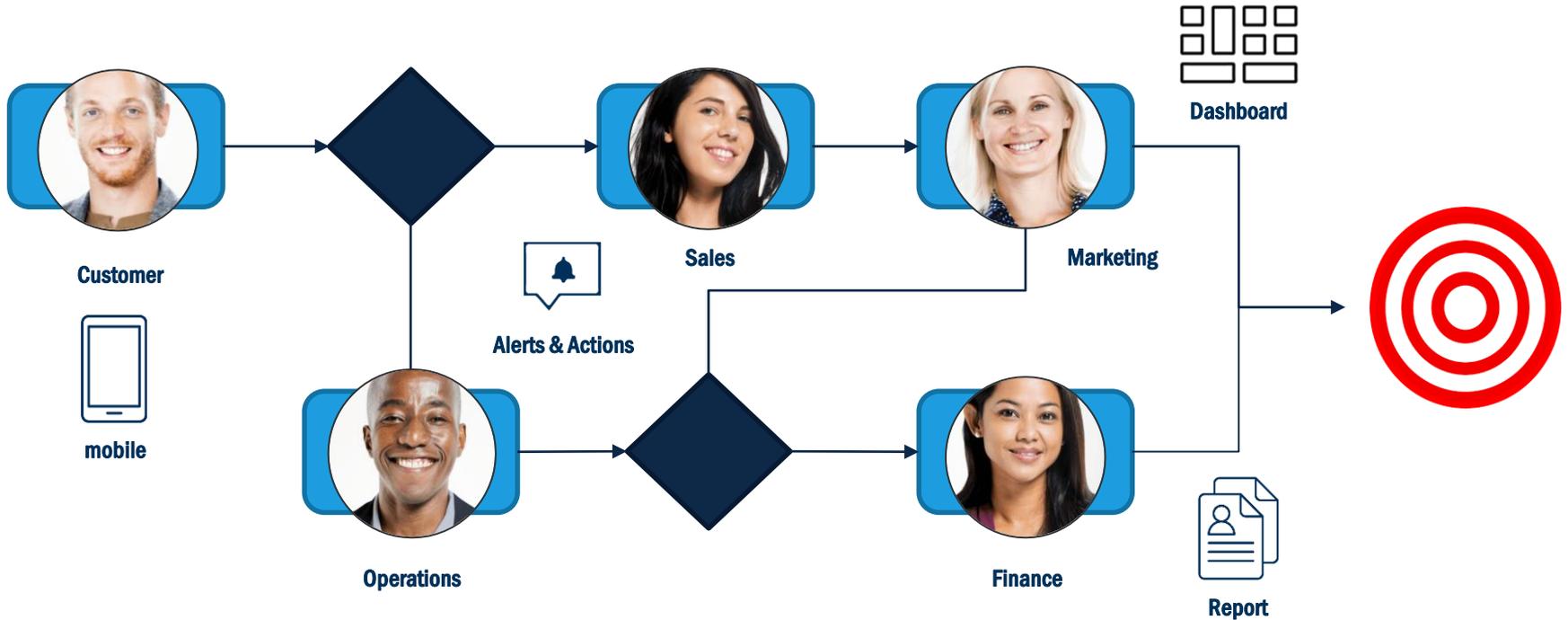
Roles

A function or part performed especially in a particular operation or process.

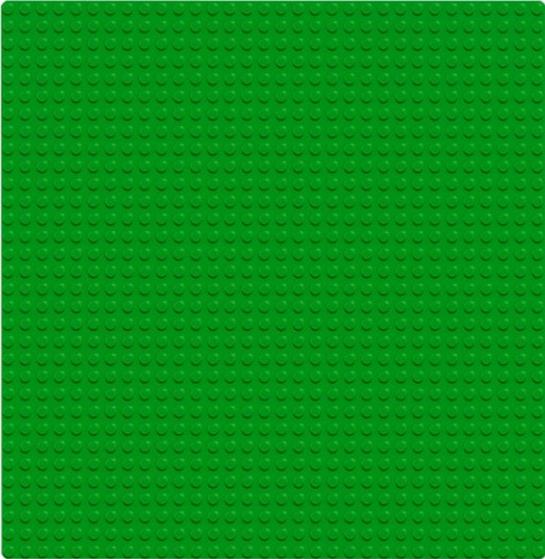


Visibility

Capability of affording a clear and unobstructed view.

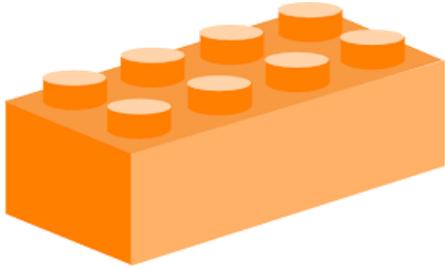


Sheets



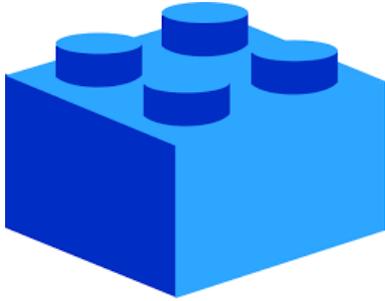
- **Home base where all of your data is stored**
- **Use hierarchy to organize and structure sheet**
- **Use formatting to easily identify information**
- **Different column types track different data**
- **Set automated alerts & actions**
- **Can be viewed as a grid, calendar, card view, or gantt chart**

Forms



- **Collect data from anyone**
- **Customize field properties and help text**
- **Use custom branding and colors**
- **Access via mobile for on-the-go process**
- **Send via email, hyperlink, or even publish to a website**

Reports



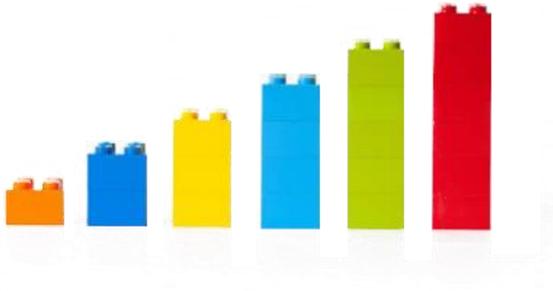
- **Manage work across multiple sheets**
- **Answer key business questions**
- **Display in grid, gantt, or calendar view**
- **Share, send as a PDF, or Publish**

Automation



- **Automated alerts to colleagues**
- **Automated reminders based on dates**
- **Automated update requests for easy partial editing**
- **Automated Approvals for request and approval process**
- **Visual Workflow**
- **Lock and unlock rows**

Dashboards



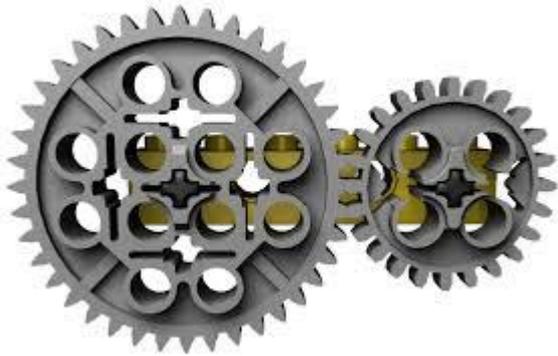
- **Surface key metrics across a program or process without exposing underlying data**
- **Live real-time updates to data as it changes**
- **Use as a central resource portal for your team members**
- **Build charts to visualize trends and metrics**
- **Embed web content including videos, forms, and other applications**

Mobile



- **Easy access to data on-the-go**
- **Remote or field stakeholders can easily update and consume information**
- **Take pictures on your mobile device and attach them to a row in a sheet or enter them into a cell**
- **Receive and respond to alerts, approvals and forms directly on your mobile device**

Integrations

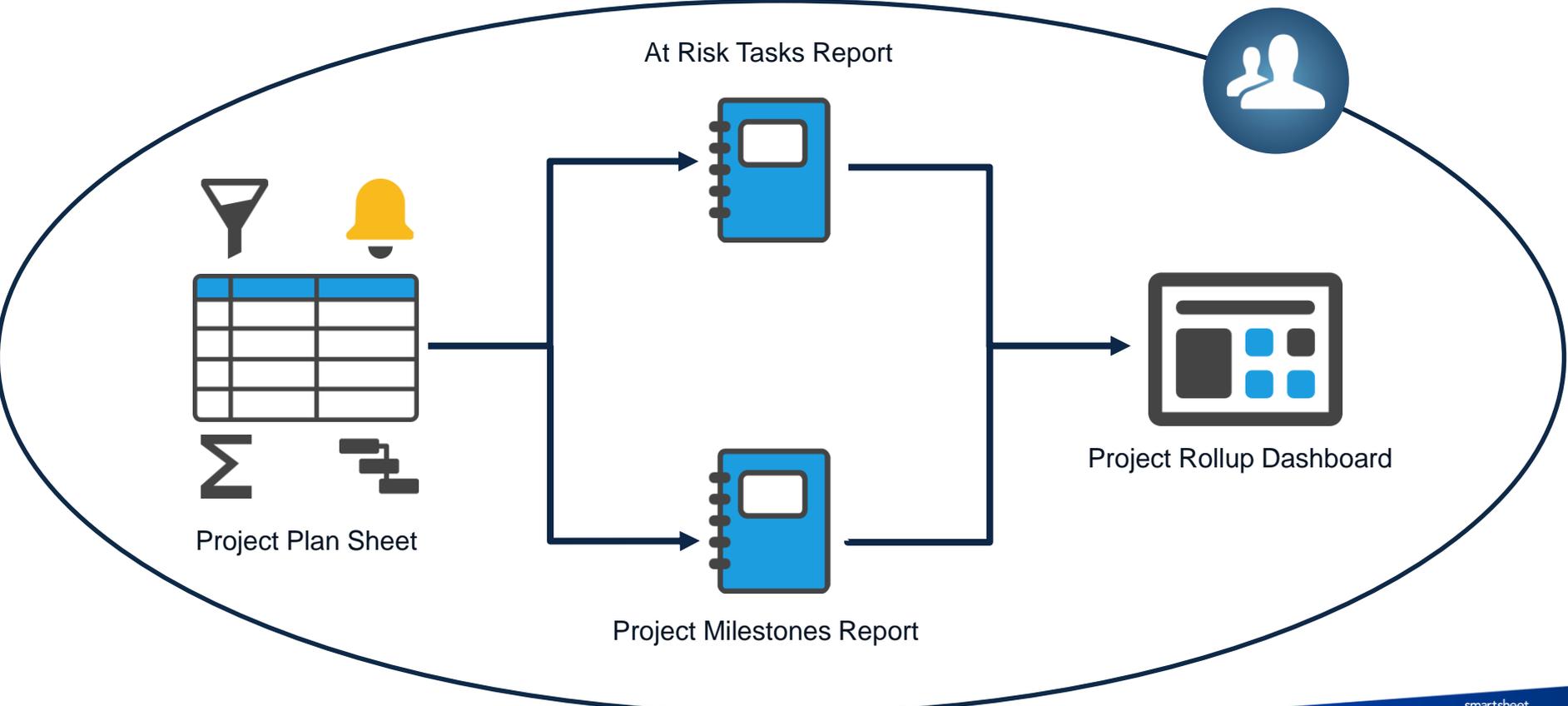


- **Connect to other apps to solve a complex problem**
- **Automation between Smartsheet and other apps**

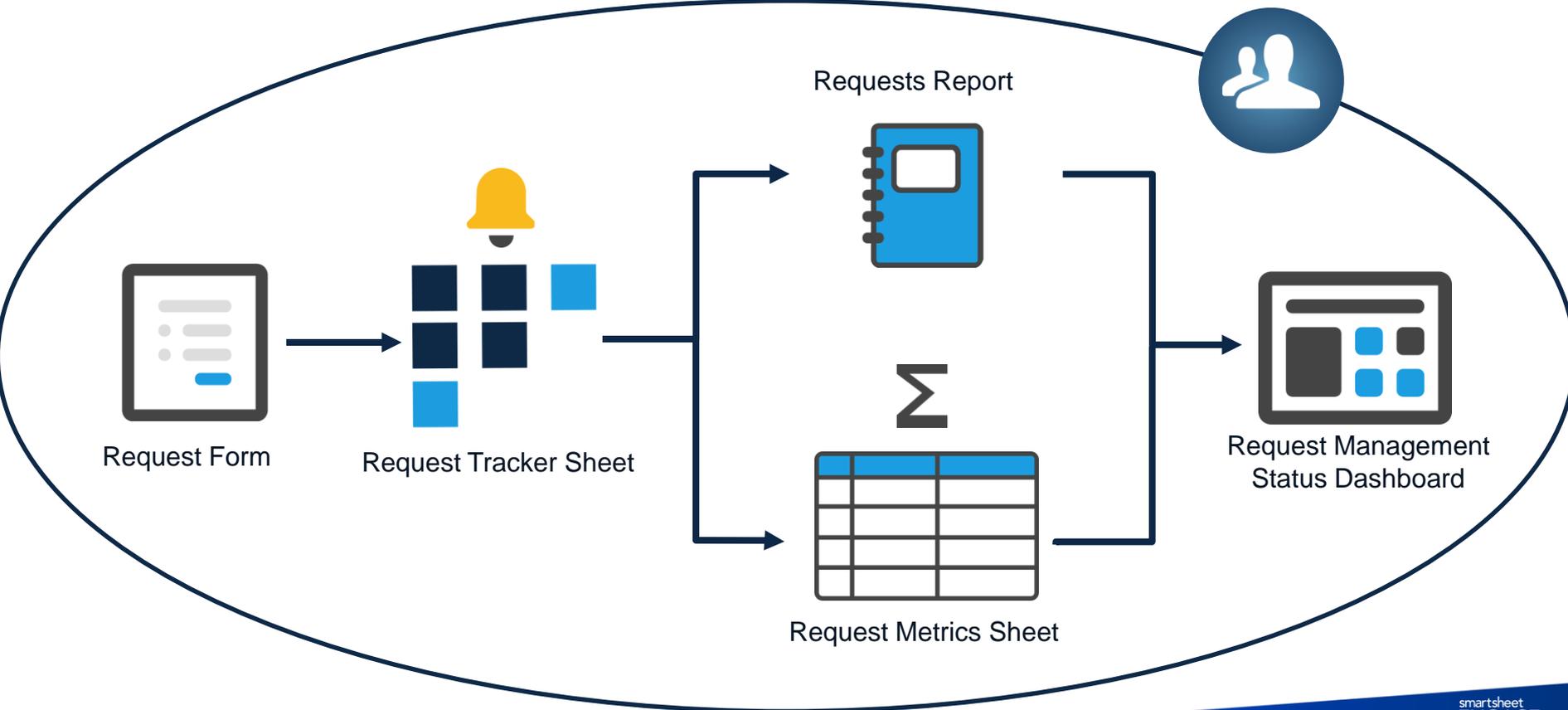
Demos

Status	Assigned To	Start Date	Due Date	Budget	Actuals	% DI
Complete	Elizabeth Bennet	07/31/17	08/01/17	\$5,000	\$3,755	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$10,000	\$9,278	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$5,000	\$5,315	
Complete	Elizabeth Bennet	08/07/17	08/11/17	\$5,000	\$4,714	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$27,808	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$26,779	
Complete	Roman Mars	08/14/17	08/21/17	\$65,000	\$66,280	
Complete	Roman Mars	08/21/17	09/01/17	\$65,000	\$67,310	
In Progress	Charlotte Lucas	09/04/17	09/08/17	\$75,000	\$73,000	
Not Started	William Darcy	09/11/17	09/22/17	\$70,000		

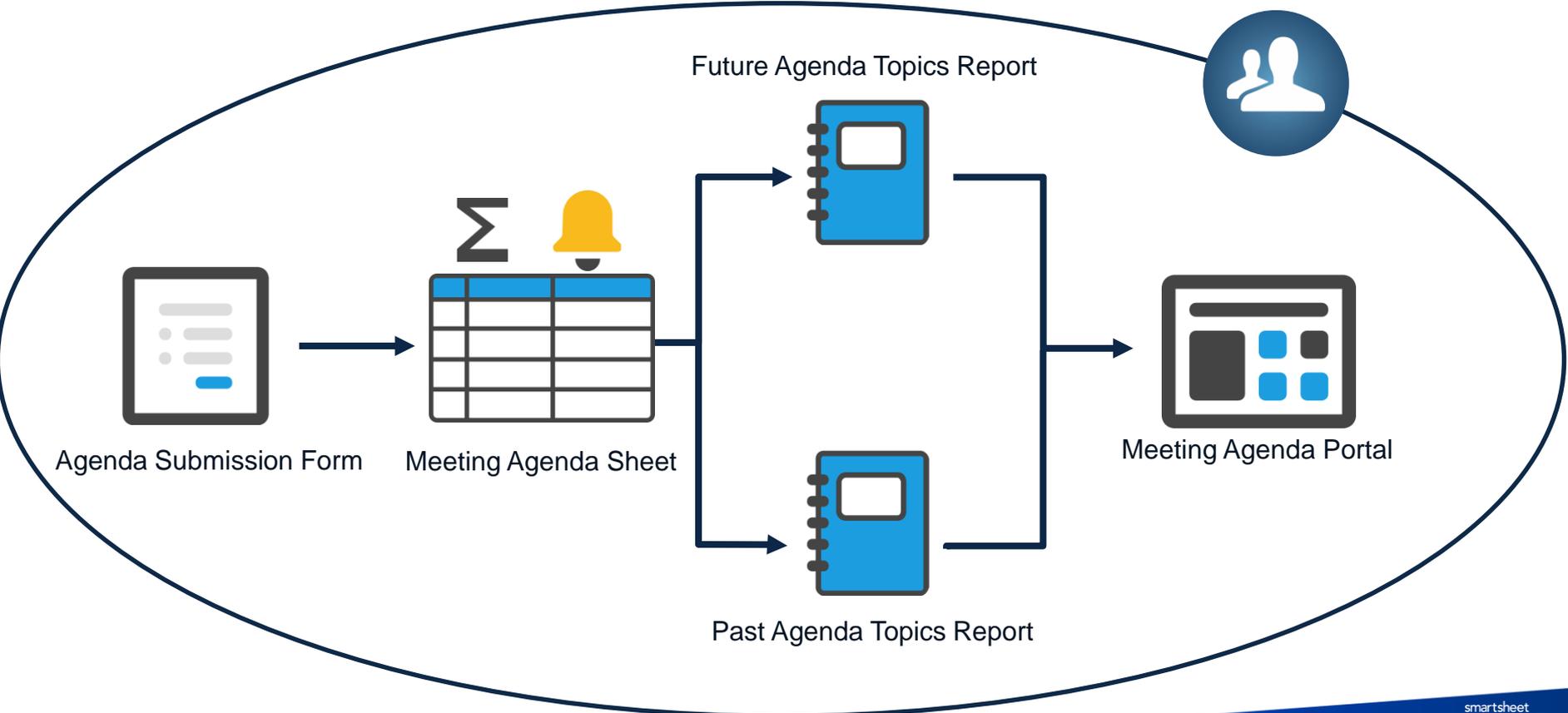
Project Tracking and Rollup Workflow



Request Management Workflow



Meeting Management Workflow



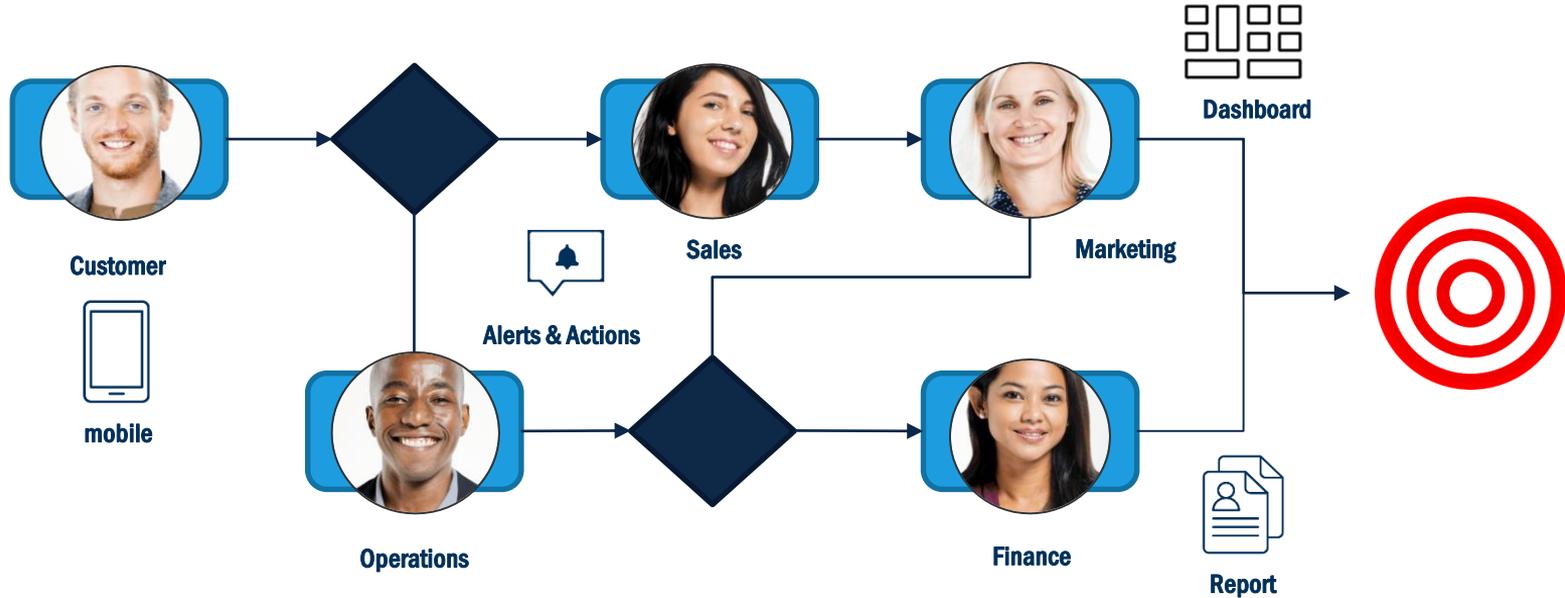
Review

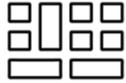
Process

Goals

Roles

Visibility





dashboards



Sharing



**published
sheet**



automation



mobile



attachments



Cell linking



alerts



sheet



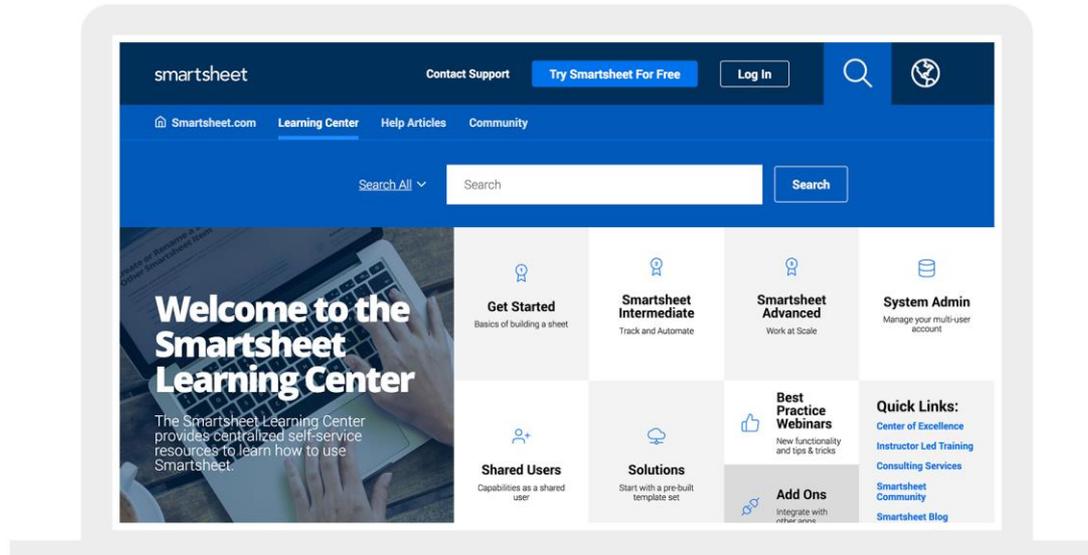
report



comments

The Learning Center

The Smartsheet Learning Center provides centralized self-service resources to learn how to use Smartsheet.



www.smartsheet.com/learning-center



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ENGAGE / Q&A

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Don't forget to:

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

