About Agile Development

A good idea doesn’t mean you’ll have a good product. You still need to research, begin development, learn from failure, and collaborate with others to transform a good idea into a great product. Smartsheet streamlines your development processes by helping you create and track plans, designs, documents, versions, tasks, failures and successes, all in one place.

Transform ideas into great products
Prioritize features based on time, difficulty, importance, and customer value.

Improve development consistency
Manage individual tasks while maintaining speed and agility.

Track real-time progress
Keep status up-to-date with automatic alerts and an always accessible web/mobile platform.
Who should use this guide

Whether you’re a director leading an end-to-end development effort or contributing to an important piece as a manager or associate, you’re in the right place. Some common roles that will benefit from this solution include:

- Product Development
- Product Management
- Product Research Management
- Program Management

- Project Management
- Research and Development
- Market Research
- Business Intelligence

Purpose

This guide is designed to help you build and execute a world-class agile development process. 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. **DEFINE**
   - Feature Prioritization
   - Identify the value of each feature to decide which make the cut.

2. **ORGANIZE**
   - Design Backlog
   - Maintain a comprehensive view of all tasks.

3. **PLAN**
   - Agile Project Plan
   - Sprint Plan
   - Create flexible agile plans and organize your sprints.

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Agile Development Solution Guide
Feature Prioritization

One inescapable reality of product development is that you can’t build everything that you want. Hard decisions and trade-offs have to be made. Smartsheet can help you make the best decisions by helping you evaluate each feature against a set of common criteria so you know that what you’re working on will add the most value.

1. Define your evaluation criteria and assign a relative importance weighting.
2. Score each feature on a scale of 1-5 and let Smartsheet calculate a feature score for you.
3. Display the features make the cut with symbols.
4. Attach supporting documents within the sheet to keep everything in context.
Design Backlog

Product development is a daunting process best managed by breaking up work into smaller tasks so they can be assigned and scheduled for completion. One of the biggest challenges with this is that tasks and assignments are always changing. Create your backlog in Smartsheet to simply the entire process. Smartsheet is always up-to-date and easily accessible from anywhere, so you can simplify both the maintenance and communication of every item in your backlog.

A. Use auto-numbering to assign unique IDs for task tracking.

B. Use symbols, like stars, to indicate priority.

C. Assign owners to tasks, pulled from your company’s email address list, to make it easy to see who is working on what.

D. Set conditional formatting to display task status.

E. Toggle on a Gantt view to see a timeline of your remaining work.
Project Plan for Agile

With more frequent and shorter development cycles used in agile, it’s a constant challenge to organize tasks into groups (i.e., sprints) while keeping on top of ownership and progress. With real-time views and intuitive collaboration features, your agile plan is always up to date and accessible to everyone who needs it.

A. Add hierarchy to organize tasks by sprint.
B. Use custom dropdowns to assign story points.
C. Visualize your timeline in a Gantt chart.
D. Securely share the sheet with permission levels that you determine for each individual.
E. Skip the email back-and-forth and request updates directly from the sheet.
Sprint Plan

When working on an individual sprint, everything else in the backlog is just noise. Smartsheet’s Report Builder makes it easy to give your development team a focused view of only those tasks that need to be completed in a given sprint. The means that your sprint planners can spend less time duplicating information and more time figuring out how to get most out of each sprint.

A. Build a sprint plan by pulling information directly from the backlog.

B. Sort ‘Assigned to’ and organize your sprint based on who is working on each task.

C. Automatically reflect any changes made in the sprint plan back to the Design Backlog.

D. Securely publish your sprint plan or embed it into a webpage, like your company’s intranet.
## Jump-Start Your Agile Development with Smartsheet

1. **Read through the solution guide**
   - You’ve had an overview of the solution – now try Smartsheet for yourself.

2. **Sign up or log in to Smartsheet**
   - Sign up at [smartsheet.com/solutions](http://smartsheet.com/solutions). You can also use this with your existing account by logging in.

3. **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.

4. **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.

5. **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.
## Other Recommended Steps

<table>
<thead>
<tr>
<th></th>
<th>Delete sheets you don’t need</th>
<th>Delete a sheet is easy! You can learn how to <a href="#">here</a>.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<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></td>
<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

- 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

Fill down (also available by dragging cell corner)

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

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

\( \times 2 \) Inserts $ after column name (vertical cell reference lock).

\( \times 3 \) 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.

\( \text{mon / tue / wed / etc...} \): 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.

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.

End Takes you to the last cell of the row you are currently on.

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.
### 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></td>
<td>Adds selected values, or a range of cells.</td>
<td>=SUM(Cost1: Cost5)</td>
<td>1125.75</td>
</tr>
<tr>
<td><strong>AVG()</strong></td>
<td>Averages selected values, or a range of cells.</td>
<td>=AVG(Cost1: Cost5)</td>
<td>225.15</td>
</tr>
<tr>
<td><strong>MAX()</strong></td>
<td>Returns the highest numeric value, or latest date.</td>
<td>=MAX(Cost1: Cost5)</td>
<td>425.75</td>
</tr>
<tr>
<td><strong>MIN()</strong></td>
<td>Returns the lowest numeric value, or earliest date.</td>
<td>=MIN(Cost1: Cost5)</td>
<td>100</td>
</tr>
<tr>
<td><strong>INT()</strong></td>
<td>Returns the integer portion of a given number.</td>
<td>=INT(Cost5)</td>
<td>425</td>
</tr>
<tr>
<td><strong>ROUND()</strong></td>
<td>Rounds a given number to the desired # of digits.</td>
<td>=ROUND(Cost5, 1)</td>
<td>425.8</td>
</tr>
<tr>
<td><strong>ABS()</strong></td>
<td>Returns the absolute value of a given number.</td>
<td>=ABS(-85)</td>
<td>85</td>
</tr>
<tr>
<td><strong>COUNT()</strong></td>
<td>Counts non-blank cells in a given range.</td>
<td>=COUNT([Task Name]:[Task Name])</td>
<td>5</td>
</tr>
<tr>
<td><strong>LEN()</strong></td>
<td>Returns the number of characters (length) in a given cell.</td>
<td>=LEN([Task Name]5)</td>
<td>6NOTE: Formatting/currency values aren’t included. Dates have a length of 5.</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(IS_BOOLEAN(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](http://smartsheet.com/formula-basics)
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas** - [smartsheet.com/text-formulas](http://smartsheet.com/text-formulas)
Find, Replace, capitalizing text, etc

**Date Formulas** - [smartsheet.com/formula-basics](http://smartsheet.com/formula-basics)
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas** - [smartsheet.com/date-formulas](http://smartsheet.com/date-formulas)
Weighted average, prorate, countif, countif s, sumif, sumif s

How to reference child rows

**Formula Error Messages** - [smartsheet.com/formula-error-messages](http://smartsheet.com/formula-error-messages)
What they mean, and how to troubleshoot