



ENGAGE

# Legal

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# Creative Solutions to Your Creative Team's Biggest Challenges



smartsheet

ENGAGE

v.07/16



**Tygre Hamilton**  
Marketing Solutions  
Specialist



**Karen Pytel**  
Design Operations Manager  
Savas Learning Co.



# Learning Objectives

**Learn to set up an effective intake process and prioritize projects strategically.**

**Foster collaboration and create a structured environment that supports creativity.**

**Identify and mitigate common bottlenecks using Smartsheet tools.**

**Ensure brand consistency and compliance with approval workflows and proofing processes.**

# Table of contents

1

Meet the Creative Ops Manager  
- Jordan

2

Streamlining Success

3

Formula Magic

4

Schedule Snapshot

5

Reining in Resources

6

Scaling Collaboration

7

Scaling Data

8

Wrap up

1

## Meet Jordan

Creative Ops, Manager

 smartsheet  
ENGAGE



\*Gemini generated logo

app.smartsheet.com/template-gallery/templates/3feb7afc-e62d-4f8b-8a65-0e6c28cb606d/Marketing-Shared-Services

MBFCORP

Back to templates

Capabilities: Conditional Formatting, Alert, Update Request, Approval Request, Chart Widget

```

    graph LR
      A[Creative Services Request Form] --> B[Request Tracker]
      B --> C[Approved]
      B --> D[In Progress]
      B --> E[Past Due]
      B --> F[Ready for Review]
      B --> G[Unassigned]
      C --> H[Marketing Shared Services Dashboard]
      D --> H
      E --> H
      F --> H
      G --> H
  
```

Process Map

Marketing Shared Services

Description

- Easily submit content requests to creative teams
- Submit, proof, approve, track, and report on creative work all in the same place
- Provide leadership the ability to understand the impact projects that are being worked on

Complexity

Medium

Instructions

Setup information

More support

[Contact our Implementation Services](#)



app.smartsheet.com/template-gallery/templates/3feb7afc-e62d-4f8b-8a65-0e6c28cb606d/Marketing-Shared-Services

MBFCORP

Back to templates

Copy link Create from template

Marketing Shared Services Dashboard (View Only) | smartsheet | Report Abuse | Help

## Marketing Shared Services DASHBOARD

Company Logo

Requests by Department

Department	Percentage
Sales	36%
Product	17%
Services	11%
IT	11%
Finance	6%
Other	3%

Requests by Type

Type	Count
Image	9
Font	11
Powerpoint	5
Dashboard	3
Branded Document	2
Data	2
Reports	4

Requests by Status

Status	Percentage
Review	17%
Complete	83%

Marketing Shared Services Dashboard

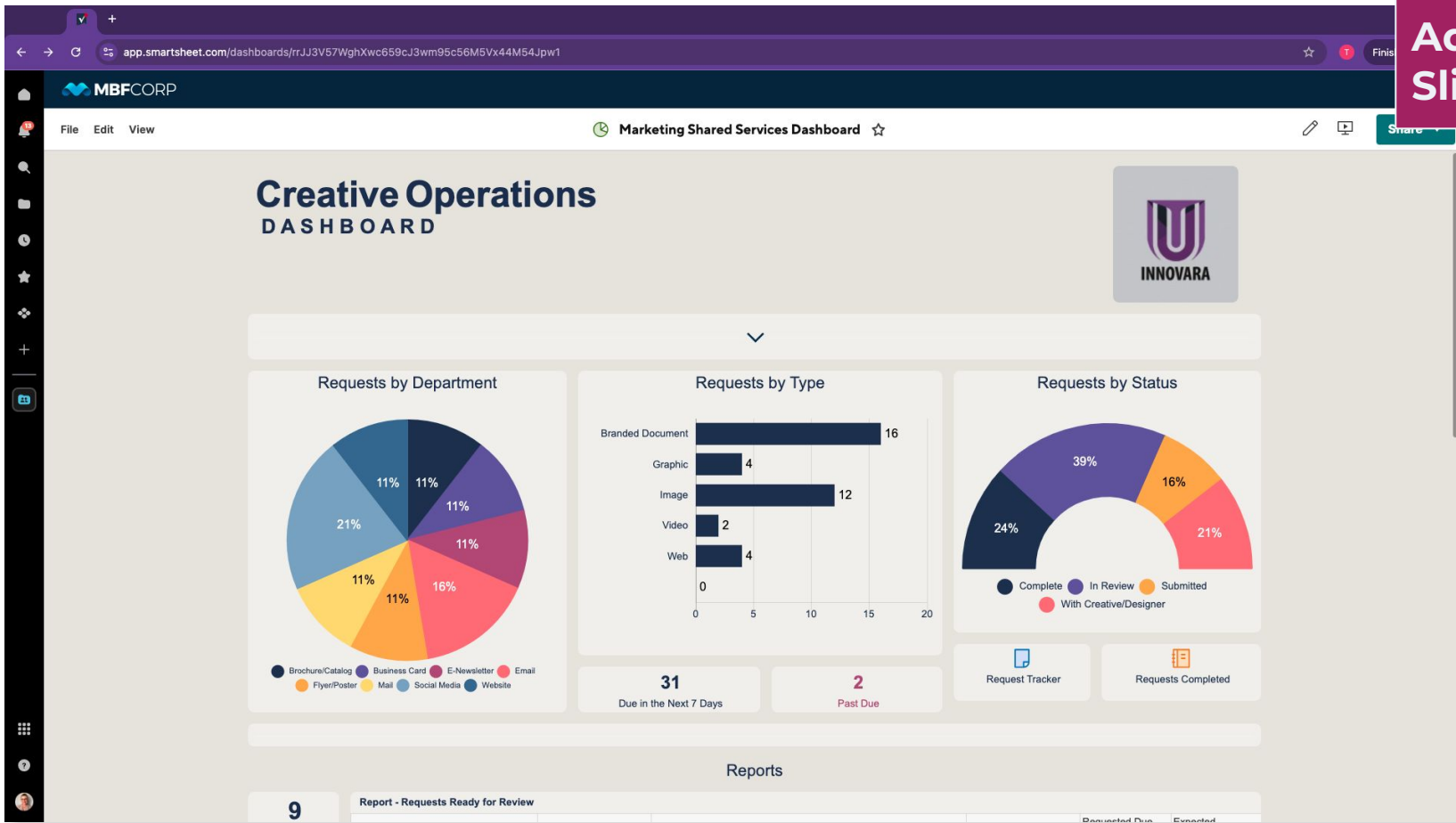
## Marketing Shared Services

- Description**
- Easily submit content requests to creative teams
  - Submit, proof, approve, track, and report on creative work all in the same place
  - Provide leadership the ability to understand the impact projects that are being worked on

**Complexity**  
Medium

**Instructions**  
Setup information

**More support**  
Contact our Implementation Services





**Dashboard Tip:**

# **Dashboard Theme**

# Additional Slide

The screenshot displays a Smartsheet dashboard titled "Creative Operations DASHBOARD" for "MBFCORP". The dashboard includes three main charts: "Requests by Department" (a pie chart), "Requests by Type" (a horizontal bar chart), and "Requests by Status" (a donut chart). Below these charts are two summary cards: "Request Tracker" showing 32 requests due in the next 7 days and "Requests Completed" showing 2 past due requests. A "Reports" section is visible at the bottom. On the right side, a "Dashboard theme" panel is open, showing various theme options like Standard, Classic, Rainbow, Sunny surf, Retro, Pastel, Starry night, Deep space, and Forest, along with background and widget background color selection options.

## Creative Operations DASHBOARD

**INNOVARA**

### Requests by Department

Department	Percentage
Brochure/Catalog	11%
Business Card	11%
E-Newsletter	11%
Email	11%
Flyer/Poster	11%
Mail	11%
Social Media	21%
Website	16%

### Requests by Type

Type	Count
Branded Document	16
Graphic	4
Image	12
Video	2
Web	4

### Requests by Status

Status	Percentage
Complete	26%
In Review	37%
Submitted	16%
With Creative/Designer	21%

**Request Tracker**  
32 Due in the Next 7 Days

**Requests Completed**  
2 Past Due

### Dashboard theme

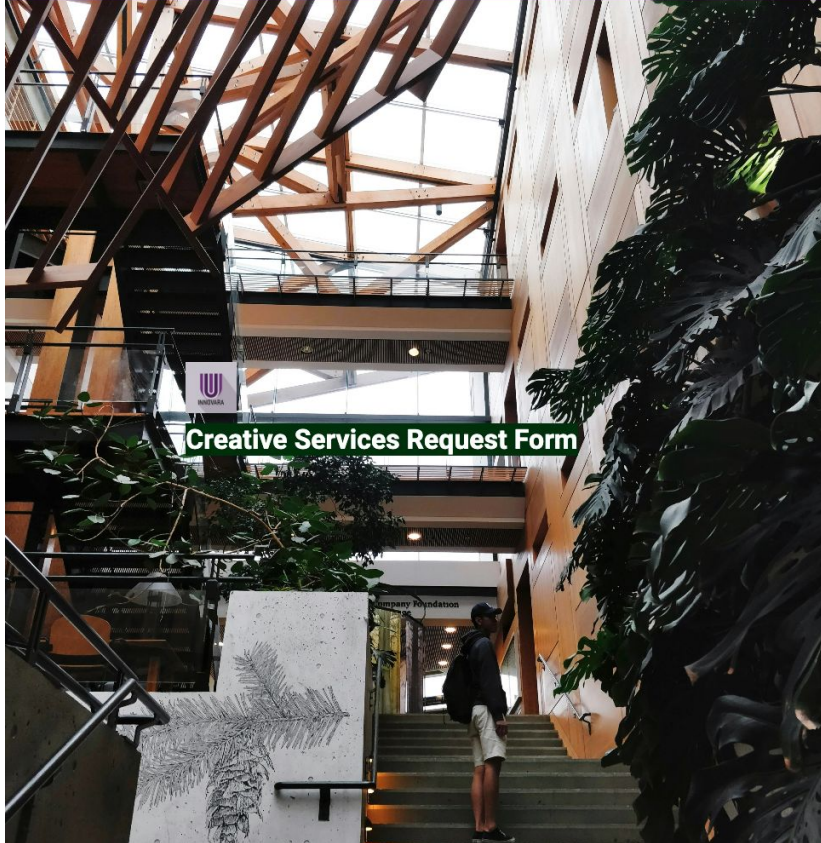
Themes 9

- Standard
- Classic
- Rainbow
- Sunny surf
- Retro
- Pastel
- Starry night
- Deep space
- Forest

Background color: #E9E7E1 [Change](#)

Widget background color: #F2F1ED [Change](#)

app.smartsheet.com/b/form/6248314f39064b93aa200947aa3ddbb2



**Creative Services Request Form**

Submitted by \*

Select or enter value

Approver \*

Request Name \*

Description \*

Type \*

Video/Animation

Requesting Department \*

Select or enter value

Video/Animation Request Details

What type of video/animation? \*

- Location
- Studio
- Narrated (no Anmx)
- Narrated (with Anmx)
- Interview
- Gif
- 3D
- Demo

What is this video or animation being created for? \*

- Social
- Blog
- Website
- Other

What are the required dimensions for the video? \*

Intake form with logic for creative requests

app.smartsheet.com/sheets/MP48CCrxJ32GJmXg2rvpWH5fPH9X2m58C9h32w1?view=grid

Request Tracker - Base

	Request Number	Status	Priority	Request Name	Description	Type	Requested Due Date	Requesting Department	Submitted by
1	REQ#1	Complete	!	New accelerator product launch	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Image	09/27/23	Product	summer.ohye@smartsheet.com
2	REQ#2	Complete	!	Marketing Accelerators	Need updated imagery for the marketing accelerator dashboards and customer facing pitch decks	Image	09/19/23	Sales	summer.ohye@smartsheet.com
3	REQ#3	Complete	-	New accelerator product launch	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Image	09/27/23	Product	summer.ohye@smartsheet.com
4	REQ#4	Complete	-	Marketing Accelerators	Need help building a pitch deck for the new product launch	Powerpoint	09/19/23	Sales	summer.ohye@smartsheet.com
5	REQ#5	Complete	-	Feature release 85	Need data services to produce a list of all customers currently using feature for proactive release engagement	Data	09/19/23	Marketing	summer.ohye@smartsheet.com
6	REQ#6	Review	↓	Feature release 85	Create external facing assets for distribution on digital channels including social	Image	09/19/23	IT	summer.ohye@smartsheet.com
7	REQ#7	Complete	↓	Pro Desk relaunch	White paper and case studies	Reports	09/19/23	Services	summer.ohye@smartsheet.com
8	REQ#8	Complete	-	Can do campaign assets	Multiple assets needed for upcoming CAN DO Campaign. Includes social and digital outreach, email and internal assets for sharing and leave behinds	Powerpoint	09/19/23	Services	summer.ohye@smartsheet.com
9	REQ#9	Complete	↓	Sales Accelerators	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Font	09/18/23	Operations	summer.ohye@smartsheet.com
10	REQ#10	Complete	↓	Can do campaign assets	Need updated imagery for the marketing accelerator dashboards and customer facing pitch decks	Font	09/18/23	Operations	summer.ohye@smartsheet.com
11	REQ#11	Complete	↓	Sales Accelerators	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Font	09/18/23	Operations	summer.ohye@smartsheet.com
12	REQ#12	Complete	!	Can do campaign assets	Need help building a pitch deck for the new product launch	Font	09/18/23	Operations	summer.ohye@smartsheet.com
13	REQ#13	Complete	-	Marketing Accelerators	Create internal assets for upcoming feature release to include FAQs and training materials	Powerpoint	09/19/23	Sales	summer.ohye@smartsheet.com
14	REQ#14	Complete	-	Pro Desk relaunch	Create external facing assets for distribution on digital channels including social	Dashboard	09/18/23	Sales	summer.ohye@smartsheet.com
15	REQ#15	Complete	-	Pro Desk relaunch	White paper and case studies	Reports	09/27/23	Finance	summer.ohye@smartsheet.com
16	REQ#16	Complete	!	New consulting package	Multiple assets needed for upcoming CAN DO Campaign. Includes social and digital outreach, email and internal assets for sharing and leave behinds	Image	09/18/23	Sales	summer.ohye@smartsheet.com
17	REQ#17	Complete	-	Product advisory council	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Image	09/18/23	Sales	summer.ohye@smartsheet.com
18	REQ#18	Complete	↓	Marketing Accelerators	Need updated imagery for the marketing accelerator dashboards and customer facing pitch decks	Image	09/19/23	Sales	summer.ohye@smartsheet.com
19	REQ#19	Review	-	Pro Desk relaunch	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Font	09/19/23	Services	summer.ohye@smartsheet.com
20	REQ#20	Review	-	Unnamed campaign assets	Need help building a pitch deck for the new product launch	Font	09/19/23	Services	summer.ohye@smartsheet.com
21	REQ#21	Complete	!	webinar follow up	Create internal assets for upcoming feature release to include FAQs and training materials	Font	09/19/23	Finance	summer.ohye@smartsheet.com
22	REQ#22	Complete	-	New consulting package	Create external facing assets for distribution on digital channels including social	Image	09/18/23	Sales	summer.ohye@smartsheet.com
23	REQ#23	Complete	↓	Product advisory council	White paper and case studies	Reports	09/18/23	Sales	summer.ohye@smartsheet.com
24	REQ#24	Complete	-	Marketing Accelerators	Multiple assets needed for upcoming CAN DO Campaign. Includes social and digital outreach, email and internal assets for sharing and leave behinds	Image	09/19/23	Sales	summer.ohye@smartsheet.com
25	REQ#25	Complete	-	Pro Desk relaunch	Need updated imagery for the website, pitch decks, and data sheets for the new product launch	Font	09/19/23	Services	summer.ohye@smartsheet.com

“Marketing Shared Services” template

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid&timelineGroupBy=none

MBFCORP

Request Tracker

Share

Grid View Filter Off

	Request Number	Priority	Submitted by	Task Due in:	Goby / Final Image	Filename	Request Name	Description	Status	Type	Campaign	Date Sub
1	REQ#42						Social Media					09
10	REQ#46						Email					09
17	REQ#8:						Physical Mail					
22	REQ#6:						E-Newsletter					
27	REQ#7:						Business Card					
32	REQ#7:						Flyer/Poster					
37	REQ#7:						Brochure/Catalog					
42	REQ#5:						Website					
47												
48												
49												
50												
51												
52												
53												
54												
55												
56												







Grouping like tasks together

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid

MBFCORP

Request Tracker

Share

Due in:	Goby / Final Image	Filename	Request Name	Description	Status	Type	Category	Campaign	Date Submitted
10 Days		IU_CPN654_SM001	Facebook Ad Graphic	Theme: Campus Life Image: A vibrant image of students studying together in a modern library or collaborating on a project in a collaborative workspace. Text: "Innovate your future at Innovara University." Call to Action: "Learn More" or "Apply Now"	Complete	Image	Category		
5 Days		IU_CPN654_SM002	Instagram Graphic	Theme: Alumni Success Image: A photo of a successful alumnus in their professional field, with a quote about their experience at Innovara University. Text: "Innovara alumni are making a difference." Call to Action: #InnovaraAlumni #SuccessStory	In Review	Image	Category		
5 Days		IU_CPN654_SM003	Instagram Ad	Theme: Academic Programs Image: A visually appealing graphic showcasing a specific academic program (e.g., engineering, business, arts). Text: "Discover your passion at Innovara University." Call to Action: "Explore Programs" or "Request Information"	In Review	Video	Category		
5 Days		IU_CPN654_SM004	LinkedIn Banner	Image: A panoramic shot of the Innovara University campus, highlighting modern architecture and beautiful surroundings. Text: "Innovara University: Where Innovation Meets Education" Call to Action: "Visit Our Website" or "Join Our Network"	In Review	Image	Category		
5 Days		IU_CPN654_SM005	X Ad	Theme: Student Life Image: A video showcasing the vibrant student life at Innovara University, including social events, clubs, and extracurricular activities. Text: "Experience the Innovara Difference" Call to Action: "Watch Video" or "Apply Now"	In Review	Image	Social Media	Next Gen Leaders	09/16/24
5 Days		IU_CPN655_SM001	Facebook Ad Graphic	Image: A group of diverse students discussing a case study in a modern classroom. Text: "Launch your business career at Innovara's School of Business."	Complete	Image	Social Media	Going Further	09/10/24

Category dropdown menu:

- Name
- Category
- Column Type: Dropdown list
- Allow multiple values per cell: [X]
- Restrict to list values only: [X]
- Values:
  - Social Media
  - Email
  - Mail
  - E-Newsletter
  - Business Card
  - Flyer/Poster
  - Brochure/Catalog
  - Website
- Cancel
- Ok

COUNT: 38

Created new drop down column



app.smartsheet.com/sheets/pr37Mji64VF4Qjc3hMQg3V8P6GRXJMhxG2WhrQm?view=board

**MBFCORP** Request Tracker Help & feedback Share

Board Filter Category

Saved filters + Add a filter No filters applied

Category: Uncategorized (1)	Social Media (8)	Email (6)	Mail (4)	E-Newsletter (4)	Business Card (4)	Flyer/Poster (4)	Brochure/Cata
<p><b>Facebook Ad Graphic</b></p> <p>REQ#1</p> <p>Theme: Campus Life ...</p> <p>Image</p> <p>Tygre Morehart</p> <p>Steven Guzaski</p> <p>Approved - Ready for DAM</p>	<p><b>NGL Email 1</b></p> <p>REQ#50</p> <p>Email targeted to prospective students</p> <p>Image</p> <p>Steven Guzaski</p> <p>In Review</p>	<p><b>Student Recruitment</b></p> <p>REQ#63</p> <p>Description: Create a mailer to attract prospective students to ...</p> <p>Branded Document</p> <p>Approved - Ready for DAM</p>	<p><b>Student News</b></p> <p>REQ#68</p> <p>Description: Create a weekly e-newsletter to keep students ...</p> <p>Branded Document</p> <p>Assigned for Build</p>	<p><b>New Professor Business Card</b></p> <p>REQ#75</p> <p>Description: Create a business card for a general professor, ...</p> <p>Branded Document</p> <p>New Request</p>	<p><b>Campus Event</b></p> <p>REQ#79</p> <p>Description: Create a flyer or poster to promote a campus-wi...</p> <p>Graphic</p> <p>Completed</p>	<p><b>Student Har</b></p> <p>REQ#53</p> <p>Description: comprehens</p> <p>Branded Do</p> <p>New Reque</p>	
	<p><b>NGL Email 2</b></p> <p>REQ#51</p> <p>Email targeted to alumni</p> <p>Image</p> <p>Steven Guzaski</p> <p>New Request</p>	<p><b>Alumni Engagement</b></p> <p>REQ#64</p> <p>Description: Create a mailer to reconnect with alumni and foste...</p> <p>Branded Document</p> <p>In Review</p>	<p><b>Faculty and Staff Updates</b></p> <p>REQ#69</p> <p>Description: Create a monthly e-newsletter to provide faculty an...</p> <p>Branded Document</p> <p>Legal Review</p>	<p><b>New Department Chair</b></p> <p>REQ#76</p> <p>Description: Create a business card for a department chair, ...</p> <p>Branded Document</p> <p>Assigned for Build</p>	<p><b>Academic Program</b></p> <p>REQ#80</p> <p>Description: Create a flyer or poster to promote a specific ...</p> <p>Graphic</p> <p>In Revision</p>	<p><b>Academic P</b></p> <p>REQ#54</p> <p>Description: showcasin</p> <p>Branded Do</p> <p>Proof Review</p>	
	<p><b>NGL Email 3</b></p> <p>REQ#52</p> <p>Email targeted to current students and faculty</p> <p>Image</p> <p>Steven Guzaski</p> <p>In Revision</p>	<p><b>Faculty Recruitment</b></p> <p>REQ#65</p> <p>Description: Create a mailer to attract talented faculty member...</p> <p>Branded Document</p> <p>In Revision</p>	<p><b>Alumni News</b></p> <p>REQ#70</p> <p>Description: Create a quarterly e-newsletter to keep alumni ...</p> <p>Branded Document</p> <p>Completed</p>	<p><b>New Research Scientist</b></p> <p>REQ#77</p> <p>Description: Create a business card for a professor who is also ...</p> <p>Branded Document</p> <p>Proof Review Complete</p>	<p><b>Student Organization</b></p> <p>REQ#81</p> <p>Description: Create a flyer or poster to promote a student ...</p> <p>Graphic</p> <p>Assigned for Build</p>	<p><b>Research ar</b></p> <p>REQ#55</p> <p>Description: catalog high</p> <p>Branded Do</p> <p>Approved -</p>	
		<p><b>Donor Relations</b></p>	<p><b>Donor Updates</b></p>	<p><b>New Adjunct Professor</b></p>	<p><b>Job Fair</b></p>	<p><b>Campus Life</b></p>	

New dropdowns in Board view

app.smartsheet.com/reports/55vRPGQHrPH8RW8RVf9hmvrFfVvXH4RXXjq9vZ1?view=grid

MBFCORP

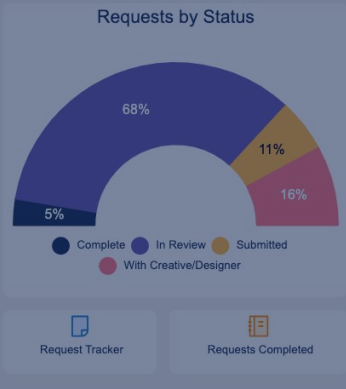
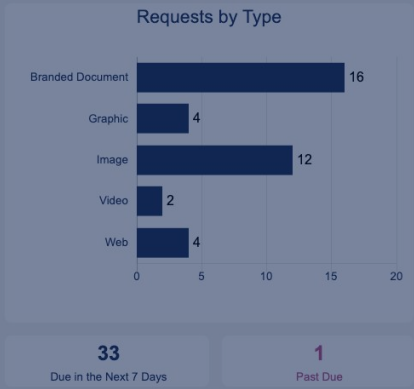
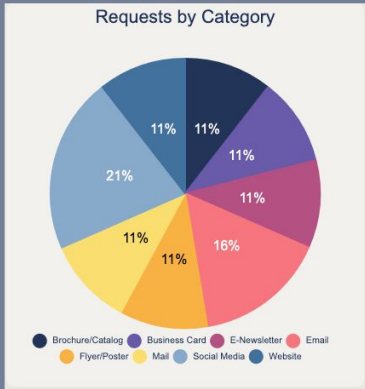
File Dynamic View [METRIC] Category ☆ Share

Grid View 1 Sheet 6 Columns Filter Criteria 1 Group 1 Summary Sort

Primary	Category	Description	Assigned to	Stage Due Date	Routing Status
	<b>Total</b>	Count			
		<b>38</b>			
▶ Category	<b>Brochure/Catalog</b>	Count			
		<b>4</b>			
▶ Category	<b>Business Card</b>	Count			
		<b>4</b>			
▶ Category	<b>E-Newsletter</b>	Count			
		<b>4</b>			
▶ Category	<b>Email</b>	Count			
		<b>6</b>			
▶ Category	<b>Flyer/Poster</b>	Count			
		<b>4</b>			
▶ Category	<b>Mail</b>	Count			
		<b>4</b>			
▶ Category	<b>Social Media</b>	Count			
		<b>8</b>			
▶ Category	<b>Website</b>	Count			
		<b>4</b>			
▶ Category	<b>Blank</b>	Count			
		<b>0</b>			

40

# Creative Operations DASHBOARD



**33**  
Due in the Next 7 Days

**1**  
Past Due

**Request Tracker**

**Requests Completed**

## Reports

**2** Report - Requests Ready for Review

Categories in a Report: Referenced for a chart

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RJMhxG2WhrQm1?view=grid

MBFCORP

Request Tracker

Share

Stage Due Date	Date Approved	Uploaded to Brandfolder	Proof Info Col... >>>	Proof Status	Version	Date Created	Date Completed	Approved By	Changes Required By	Pending Approval From	H... C... >...	Exp Cor Dat
9	9/17/24	<input type="checkbox"/>		In Review	2	09/10/24			Tygre Morehart	Eugene Oliver Shirley Huson		
10	9/16/24	<input type="checkbox"/>										
11	9/19/24	<input type="checkbox"/>		Requires Cha	1	09/10/24		Kai Senjima	Helen Bates Jamal King			
12	9/18/24	<input type="checkbox"/>		Requires Cha	3	09/10/24		Tygre Morehart	Devon Gomez Leigh Gibbs			
13	9/16/24	<input type="checkbox"/>		Requires Cha	2				Dominick George karen.pytel@savva			
14	9/19/24	<input type="checkbox"/>		In Review	1	09/10/24			Shirley Huson Eugene Oliver Hazel Christensen	Jamal King		
15	9/16/24	<input type="checkbox"/>		Approved	3	09/10/24		Everett Crosse Kai Senjima Kelly Smart				
16	9/18/24	<input type="checkbox"/>		Requires Cha	1	09/10/24		Helen Bates Hilda Wilson	Tamika Marshall			

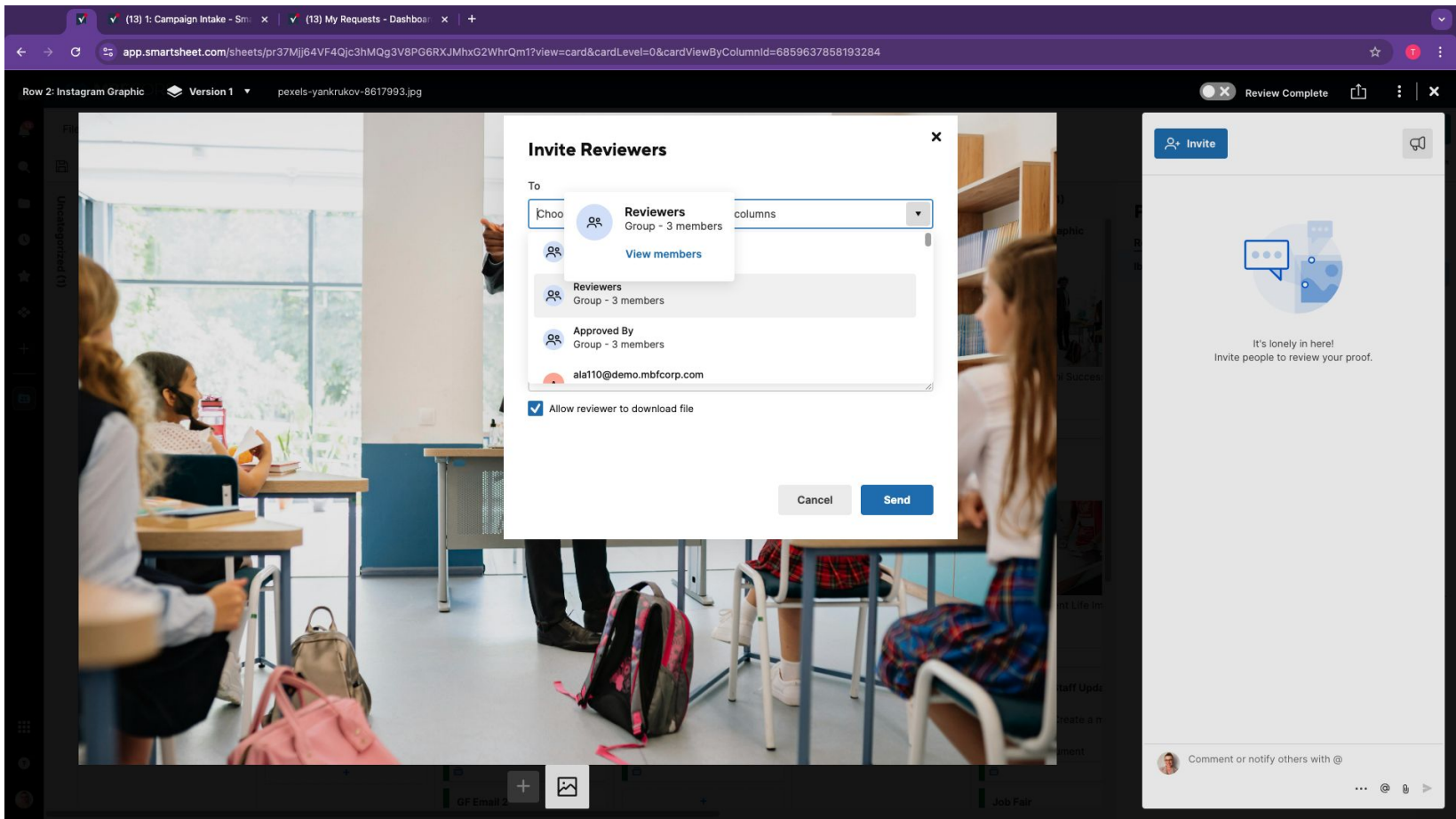
### Proof Info Columns

Info Type	Sheet Column	
Proof Status	Proof Status	⊖
Version	Version	⊖
Date Created	Date Created	⊖
Date Completed	Date Completed	⊖
Approved By	Approved By	⊖
Changes Required By	Changes Required By	⊖
Pending Approval From	Pending Approval From	⊖
Select a proof info type...		+

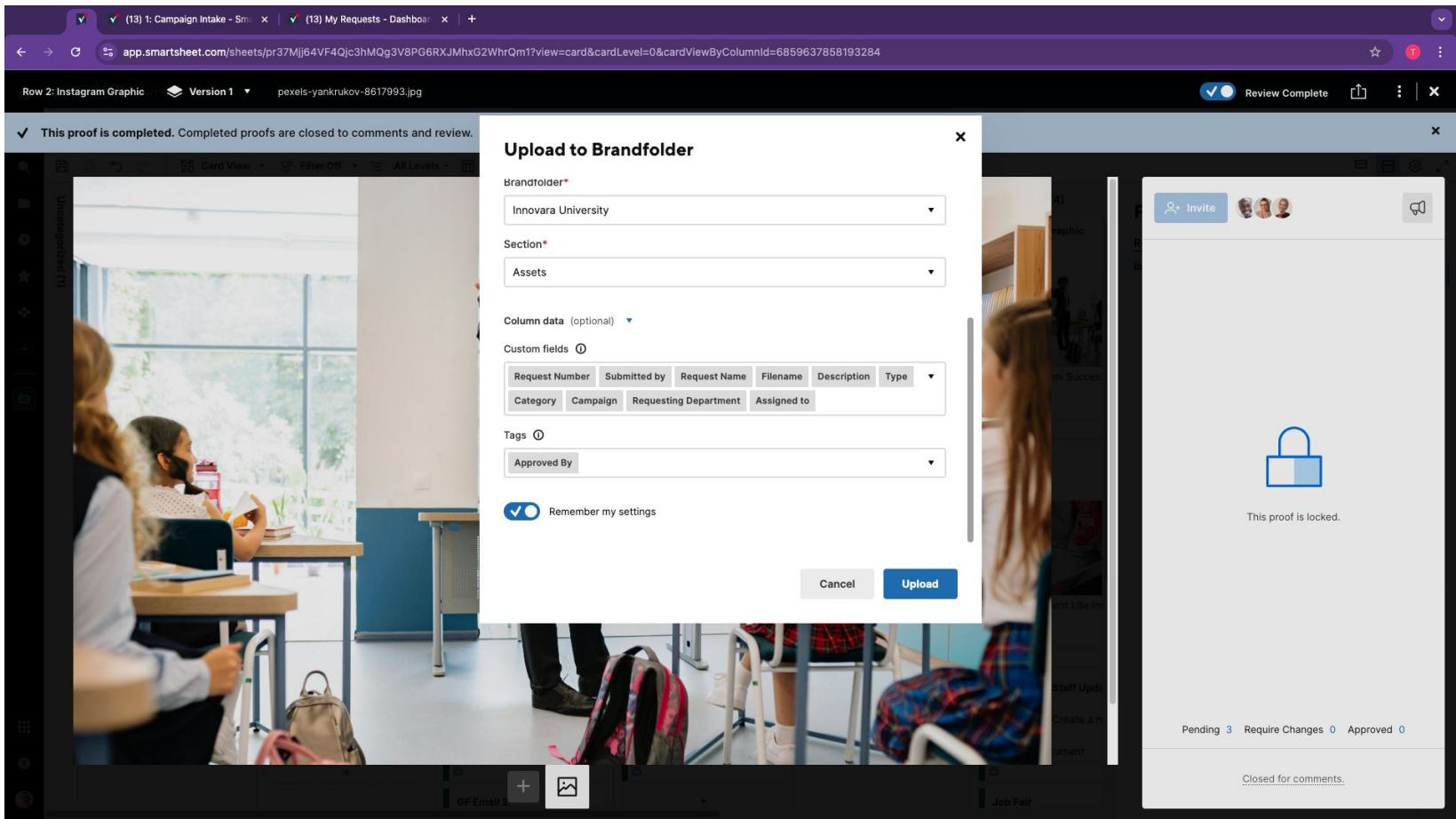


**Proofing Tip: Invite using a**

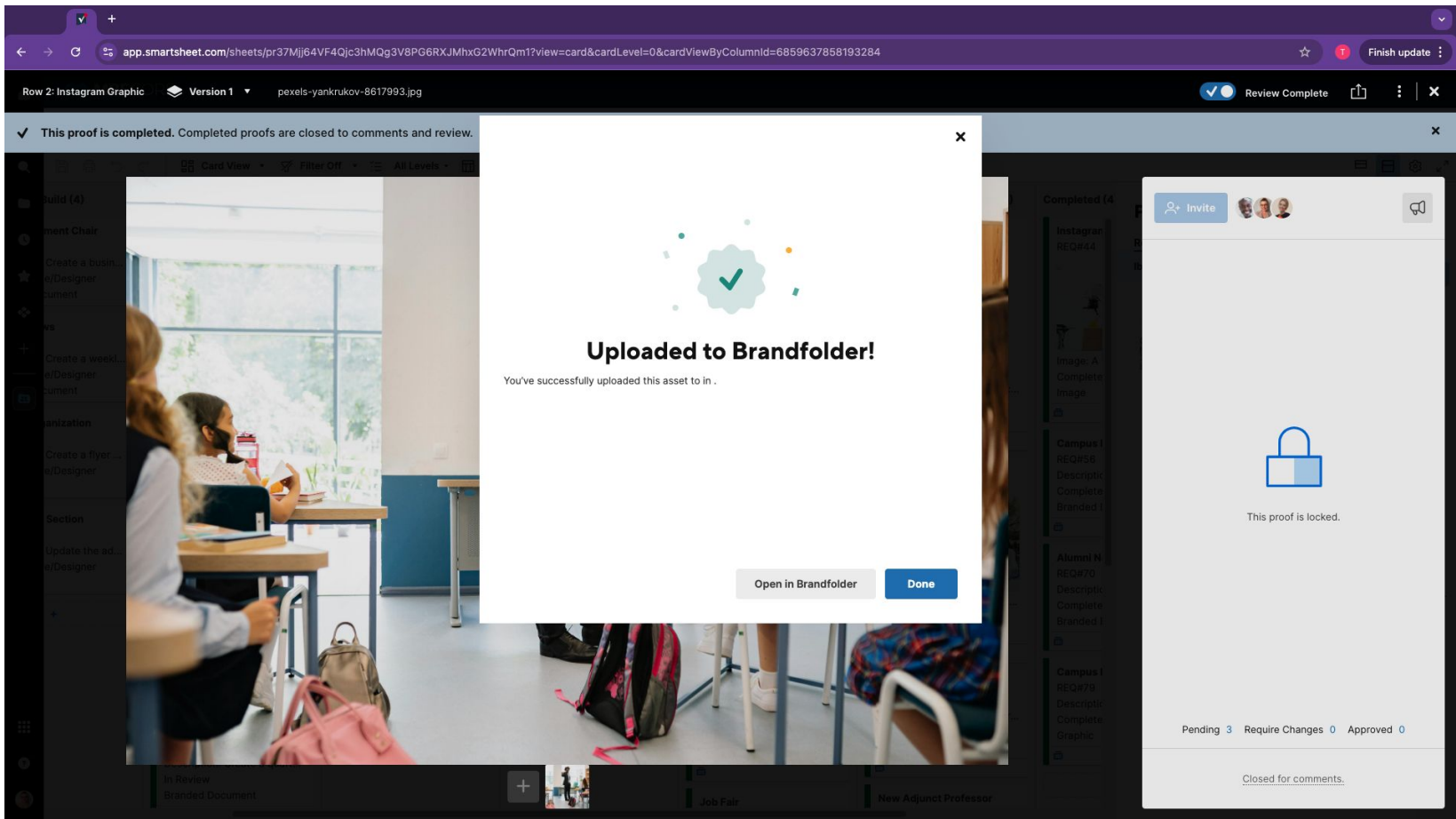
# **Contact Column**



Using Contact columns to invite reviewers to a proof



Pushing final asset to Brandfolder with metadata from the intake sheet




Uploaded!



Innovara University Official | brandfolder.com/innovara-university#/asset/mf9sr9q6pk9783gfnpmh49

### Instagram Graphic

@ 1 Overview Metadata Similar Embed Usage Workflow Edit X



Created on 09/14/2024 by Tygre Hamilton · [View recent updates](#)  
Approved by tygre.morehart@demo.mbfcorp.com

[Open in new tab](#)

#### TAGS

Bookcase Furniture Interior Design Social Group Table

#### DESCRIPTION

[View In Smartsheet](#)

#### CUSTOM FIELDS

Type	Image
Description	Theme: Alumni Success Image: A photo of a successful alumnus in their professional field, with a quote about their experience at Innovara University. Text: "Innovara alumni are making a difference." Call to Action: #InnovaraAlumni #SuccessStory

@ 1 attachment

[Options](#) [Download](#)

pexels-yankrukov-8617993.jpg  
JPG · 1.6 MB · 5895 x 3930 px · RGB · 9/14/2024

[Share](#) [Download @ 1](#)

# Additional Slide

Innovara University Official D x +

brandfolder.com/innovara-university#/asset/mf9sr9q6pk9783gfnpmh49

### Instagram Graphic

@ 1 Overview Metadata Similar Embed Usage Workflow Edit X

**TAGS**

Bookcase Furniture Interior Design Social Group Table

**DESCRIPTION**

[View In Smartsheet](#)

**CUSTOM FIELDS**

Type	Image	Q
Description	Theme: Alumni Success Image: A photo of a successful alumnus in their professional field, with a quote about their experience at Innovara University. Text: "Innovara alumni are making a difference." Call to Action: #InnovaraAlumni #SuccessStory	Q
Category	Social Media	Q
Campaign	Next Gen Leaders	Q
Filename	IU_CPN654_SM002	Q
Request Number	REQ#2	Q
Request Name	Instagram Graphic	Q


Hide Some Fields X

**ASSET KEY**

mf9sr9q6pk9783gfnpmh49 [Copy asset key](#)

LINK TO ASSET CARD

@ 1 attachment



Options Download

pexels-yankrukov-8617993.jpg

JPG 1.6 MB · 5895 x 3930 px · RGB · 9/14/2024

Share Download @ 1

# Additional Slide

The screenshot shows the Smartsheet interface for editing an asset named "Instagram Graphic". The top navigation bar includes tabs for Overview, Metadata, Similar, Embed, and Usage. The "Edit" button is highlighted with a red box and a blue arrow. The main editing area has sections for Asset Name, Description, Tags, and Suggested Tags. The "Suggest Description" button is highlighted with a red box and a blue arrow. Other buttons like "Delete Asset" and "Save Changes" are also visible.


Use AI to Suggest Description

brandfolder.com/innovara-university#asset/mf9sr9q6pk9783gfnpmh49

### Instagram Graphic

Overview Metadata Similar Embed Usage Workflow **Edit**

Asset Name: Instagram Graphic



Instagram Graphic @ 1

Asset Details Custom Fields Advanced English (EN) (default)

Description [Suggest Description](#)

**Suggested description** X

A teacher is standing in front of a classroom full of students

How is this description?

Append **Replace**

Tags [Copy Tags](#) [Delete Tags](#)

Bookcase X Furniture X Interior Design X Social Group X Table X

Suggested Tags  library  чен

**Delete Asset** **Save Changes**

Use AI to Suggest Description

## Brandfolder AI “Suggest Description”

# Append

Will keep the link to Smartsheet

Search pins updated! X  
42 Assets Share Brandfolder

# Innovara University

- Links
- Sections  All  Assets  Campus  NexGen Leaders
- Pins  Alumni

LABELS >>

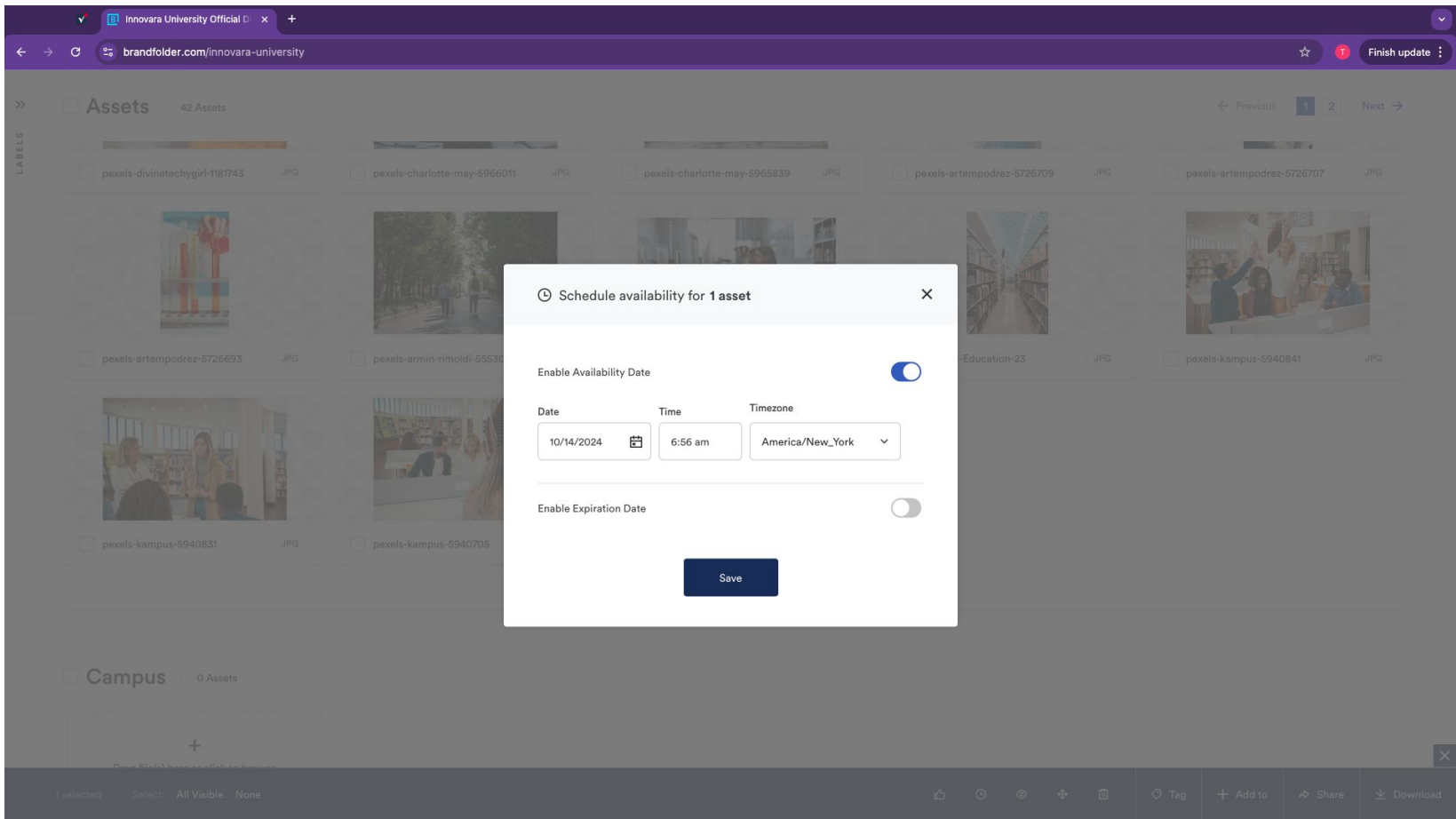
Filters 1 Any of these terms Q Alumni Search

Organize by section Sort by: Creation date (new... View Options

## NexGen Leaders 1 Asset

+  
Drag file(s) here or click to browse  
Create new asset







Set availability and Expiration dates for assets in Brandfolder


LABELS


### Assets | 42 Assets


← Previous 1 2 Next →


- 


pexels-artempodrez-5726693 JPG
- 


pexels-armin-rimoldi-5553054 JPG
- 

Solutions-Education-27 JPG
- 

Solutions-Education-23 JPG
- 

pexels-kampus-5940841 JPG
- 

pexels-kampus-5940831 JPG
- 

pexels-kampus-5940705 JPG
- 

Innovara University Wher... PNG

### Campus | 0 Assets

+  
Drag file(s) here or click to browse

Create new asset



app.smartsheet.com/sheets/pr37Mj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=card&cardLevel=0&cardViewByColumnId=6859637858193284

MBFCORP

File Automation Forms Connections Dynamic View

Request Tracker ☆

Share

Card View Filter Off All Levels View by Routing Status

New Request (6)	Assigned for Build (4)	In Review (7)	In Revision (4)	Proof Review Complete (4)	Legal Review (3)
<b>Instagram Ad</b> REQ#43 "Image: A student celebrati... Submitted Video	<b>New Department Chair</b> REQ#76 Description: Create a busin... With Creative/Designer Branded Document	<b>NGL Email 1</b> REQ#50 Email targeted to prospecti... In Review Image	<b>Faculty Recruitment</b> REQ#65 Description: Create a mailer... With Creative/Designer Branded Document	<b>New Research Scientist</b> REQ#77 Description: Create a busin... In Review Branded Document	<b>X Ad</b> REQ#5 Theme: Student Li In Review Image
<b>New Professor Business Card</b> REQ#75 Description: Create a busin... Submitted Branded Document	<b>Student News</b> REQ#68 Description: Create a week... With Creative/Designer Branded Document	<b>Instagram Ad</b> REQ#3 Theme: Academic Program... In Review Video	<b>Homepage Redesign</b> REQ#58 Description: Redesign the u... With Creative/Designer Web	<b>Academic Programs</b> REQ#54 Description: Create a catalo... In Review Branded Document	<b>Faculty and Staff</b> REQ#69 Description: Creat In Review Branded Document
<b>Student Handbook</b> REQ#53 Description: Create a comp... Submitted Branded Document	<b>Student Organization</b> REQ#81 Description: Create a flyer ... With Creative/Designer Graphic	<b>LinkedIn Banner</b> REQ#4 Image: A panoramic shot of... In Review Image	<b>GF Email 1</b> REQ#49 Email targeted to prospecti... With Creative/Designer Image	<b>Donor Relations</b> REQ#66 Description: Create a mailer... In Review Branded Document	<b>Job Fair</b> REQ#82 Description: Creat In Review Graphic
<b>NGL Email 2</b> REQ#51 Email targeted to alumni Submitted Image	<b>Admissions Section</b> REQ#59 Description: Update the ad... With Creative/Designer Web	<b>Donor Updates</b> REQ#71 Description: Create a quart... In Review Branded Document			
<b>GF Email 3</b> REQ#47 Email targeted to current st... Submitted Image					
<b>NGL Email 3</b> REQ#52 Email targeted to current st... Submitted Image					

**Brandfolder**

← MBF Corp

Innovara University

1 Search

All Se Alumni

Assets 1-16 of 41 assets

Assets shown include: pexels-visual (JPG), pexels-tima-1 (JPG), pexels-thisis (JPG), and pexels-thisis (JPG).

# From solid foundation to scaled solution



## Process =

Collaboration and workflow  
are going well



## Thoughtful Changes

Improve but don't break

Adapt to needs



## Scaling the Solution

Building automation and  
using formulas to reduce  
manual effort

Scaling setup with Control  
Center

# 2

## Streamlining Success

Using Automation to reduce manual effort

smartsheet

ENGAGE



**Automations Tip:**

**[ACTION]**

- *Brief description of  
action*

EX: [DATE] Update “Routing/Revision Status Date Changed” column



## Saved Automation Workflows

Filter by all ▾

Sort by name ▾





## Popular Templates

 **[Change Cell] Assign Cost for each Asset Type** 

Trigger: When rows are added or changed AND when 'Request Type' changes to Any Value

Actions: Change a cell

Last ran on Jul 25, 2024, 12:12 PM • Last modified by Tygre Morehart on Mar 5, 2024, 3:40 PM

 **[Change cell] If "Proof Status" changes to "In Review", then Status = "In Review"** 

Trigger: When rows are added or changed AND when 'Routing/Revision Status' changes to 'In Review'

Actions: Change a cell



Last ran on Aug 28, 2024, 1:01 PM • Last modified by Tygre Morehart on Mar 5, 2024, 3:40 PM

 **[Change Cell] If "Routing/Revision Status" is "Assigned for Build", then "Status" = "In Progress"** 

Trigger: When rows are changed AND when 'Routing/Revision Status' changes to 'Assigned for Build'

Actions: Change a cell

Last ran on Aug 29, 2024, 12:58 PM • Last modified by Tygre Morehart on Mar 5, 2024, 3:40 PM

 **[Change cell] If "Routing/Revision Status" is "Complete", then Status = "Complete"** 

Trigger: When rows are added or changed AND when 'Routing/Revision Status' changes to one of 'Completed', 'Approved - Ready for DAM',...

Actions: Change a cell

Last ran on Aug 28, 2024, 1:01 PM • Last modified by Tygre Morehart on Mar 5, 2024, 3:40 PM

 **[Change Cell] If "Routing/Revision Status" is "In Review", then "Status" = "In Review"** 

Trigger: When rows are changed AND when 'Routing/Revision Status' changes to 'In Review'



Alert someone when specified criteria are met



Remind someone on a specific date



Move a row to another sheet when specified criteria are met



Request an update every week

See more templates

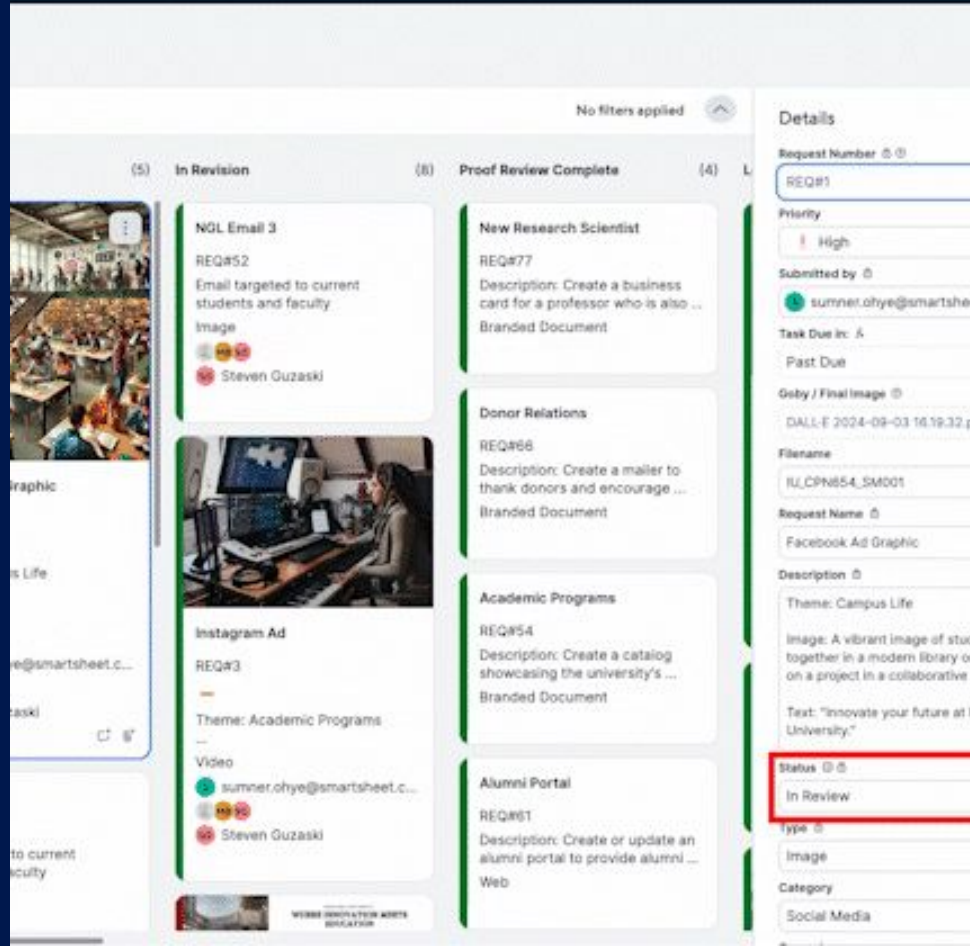
# Update Overall Status

**What:** Workflow to update “Status” column

**Why:** Reduce duplicative manual updates

**How:**

1. Define different status columns
2. Determine grouping
3. Create Workflow





connections Dynamic View

Request Tracker\_Conditional Formatting turned off ☆

Request Tracker\_Conditional Formatting turned off ☆

Filter Off Arial 10 B I U S A

Status	Goby / Final Image	Filename	Request Name	Description	Assigned to	Approver	Reviewers	Approval	Routing Status	Routing Status Changed	Days to complete task	Stage Du Date									
<div data-bbox="67 289 363 682"> <p>Name: <input type="text" value="Status"/></p> <p>Column Type: <input type="text" value="Dropdown list"/></p> <p>Allow multiple values per cell: <input type="checkbox"/></p> <p>Restrict to list values only: <input checked="" type="checkbox"/></p> <p>Values: Submitted, With Creative/Designer, In Review, Complete</p> <p>Buttons: Cancel, Ok</p> </div>																					
		iM001	Facebook Ad Graphic	<p>Theme: Campus Life</p> <p>Image: A vibrant image of students studying together in a modern collaborating on a project in a collaborative workspace.</p> <p>Text: "Innovate your future at Innovara University."</p> <p>Call to Action: "Learn More" or "Apply Now"</p>	sg Steven Guzaski		Devon Gomez, Hazel Christensen, Kai Senjima		<div data-bbox="1555 289 1850 748"> <p>Name: <input type="text" value="Routing Status"/></p> <p>Column Type: <input type="text" value="Dropdown list"/></p> <p>Allow multiple values per cell: <input type="checkbox"/></p> <p>Restrict to list values only: <input type="checkbox"/></p> <p>Values: New Request, Assigned for Build, In Review, In Revision, Proof Review Complete, Legal Review, Approved - Ready for DAM, Completed</p> <p>Buttons: Cancel, Ok</p> </div>												
		iM002	Instagram Graphic	<p>Theme: Alumni Success</p> <p>Image: A photo of a successful alumnus in their professional field, about their experience at Innovara University.</p> <p>Text: "Innovara alumni are making a difference."</p> <p>Call to Action: #InnovaraAlumni #SuccessStory</p>	sg Steven Guzaski		Dominick George, Kelly Smart, Tygre Morehart														
		iM003	Instagram Ad	<p>Theme: Academic Programs</p> <p>Image: A visually appealing graphic showcasing a specific acaden (e.g., engineering, business, arts).</p> <p>Text: "Discover your passion at Innovara University."</p> <p>Call to Action: "Explore Programs" or "Request Information"</p>	sg Steven Guzaski		Eugene Oliver, Leigh Gibbs, Tamika Marshall														
		iM004	LinkedIn Banner	<p>Image: A panoramic shot of the Innovara University campus, highl architecture and beautiful surroundings.</p> <p>Text: "Innovara University: Where Innovation Meets Education"</p> <p>Call to Action: "Visit Our Website" or "Join Our Network"</p>	sg Steven Guzaski		Everett Crosse, Shirley Huson														
With Creative/D		IU_CPN654_SM005	X Ad	<p>Theme: Student Life</p> <p>Image: A video showcasing the vibrant student life at Innovara Uni including social events, clubs, and extracurricular activities.</p> <p>Text: "Experience the Innovara Difference"</p> <p>Call to Action: "Watch Video" or "Apply Now"</p>	sg Steven Guzaski		Helen Bates, Hilda Wilson, Jamal King		Assigned for Build	09/14/24	2	09/17/24									
With Creative/D		IU_CPN655_SM001	Facebook Ad Graphic	<p>Image: A group of diverse students discussing a case study in a r classroom.</p> <p>Text: "Launch your business career at Innovara's School of Busine</p>	ra Rajiv Arunkundram		Karen Pytel		Assigned for Build	09/14/24	1	09/18/24									

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=board&cardViewByColumnId=6859637858193284

**MBFCORP** Request Tracker Help & feedback Share

Board Filter Routing Status

Saved filters + Add a filter No filters applied

(4) Assigned for Build	(5) In Review	(6) In Revision	(1) Proof Review Complete	(17) Legal Review	(2) Approved - Ready for DAM
<p><b>New Department Chair</b> REQ#76 Description: Create a business card for a department chair, ... Branded Document Eugene Oliver</p> <p><b>Student News</b> REQ#68 Description: Create a weekly e-newsletter to keep students ... Branded Document Everett Crosse</p> <p><b>Student Organization</b> REQ#81 Description: Create a flyer or poster to promote a student ... Graphic Leigh Gibbs</p> <p><b>Admissions Section</b> REQ#59 Description: Update the admissions section of the website</p>	<p>Jose Price</p> <p><b>Donor Updates</b> REQ#71 Description: Create a quarterly e-newsletter to thank donors and ... Branded Document Leigh Gibbs</p> <p><b>GF Email 2</b> REQ#48 Email targeted to alumni Image Jose Price</p> <p><b>Faculty and Staff Directory</b> REQ#60 Description: Create or update a faculty and staff directory to ... Web Leigh Gibbs</p>	<p><b>Facebook Ad Graphic</b> REQ#45 Image: A group of diverse students discussing a case stud... Image Everett Crosse</p>	<p><b>Facebook Ad Graphic</b> REQ#1 Theme: Campus Life ... Image Jordan Smith</p> <p><b>New Research Scientist</b> REQ#77 Description: Create a business card for a professor who is also ... Branded Document Tamika Marshall</p> <p><b>Academic Programs</b></p>	<p><b>Faculty and Staff Updates</b> REQ#69 Description: Create a monthly e-newsletter to provide faculty an... Branded Document Hilda Wilson</p> <p><b>Job Fair</b> REQ#82 Description: Create a flyer or poster to promote a job fair or ... Graphic Everett Crosse</p>	<p><b>Research and Innovation</b> REQ#55 Description: Create a brochure or catalog highlighting the ... Branded Document Everett Crosse</p> <p><b>Instagram Graphic</b> REQ#44 Image: A team of scientists or researchers working in a state-o... Image Hilda Wilson</p>







app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=board&filterId=8840225812860804

**Request Tracker** Help & feedback

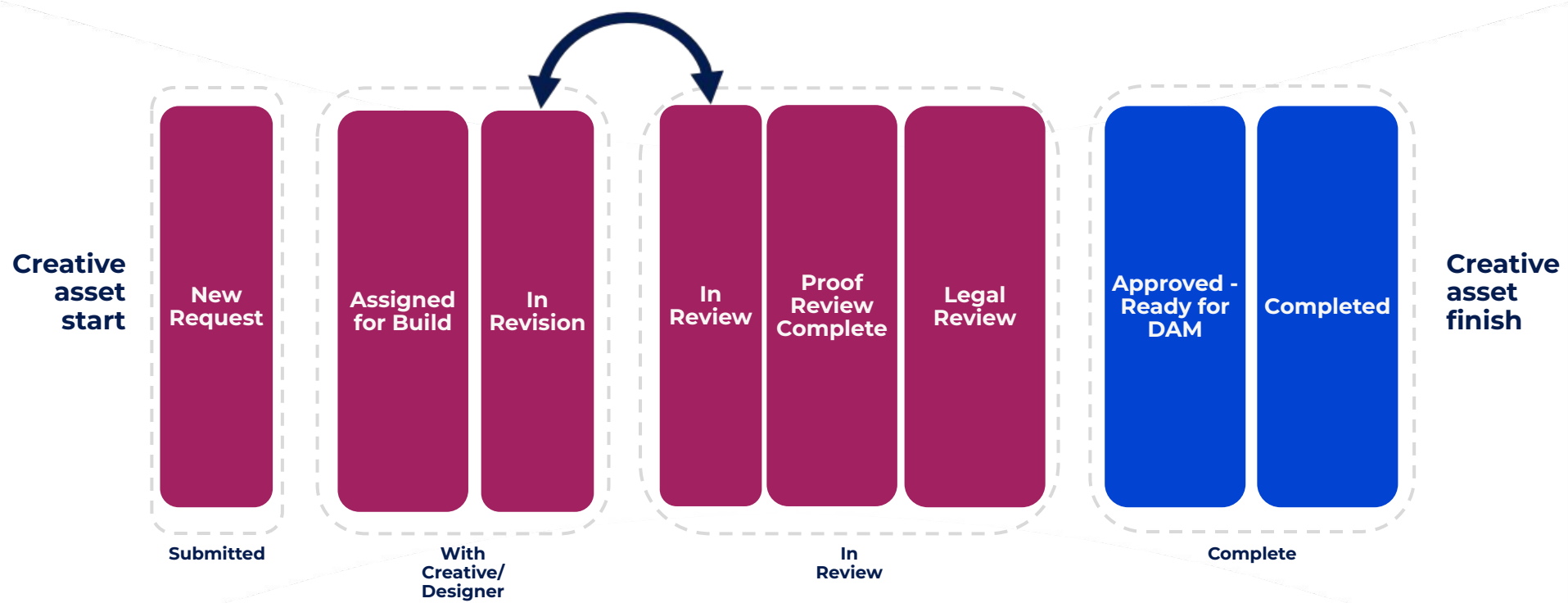
Board | 1 Filter | Status | 38 of 40 items shown

Request Date needs Review... | + Add a filter

Status: Uncategorized (0)

Submitted (4)	With Creative/Designer (6)	In Review (26)	Complete (2)	+ Add lane
<p><b>NGL Email 2</b></p> <p>REQ#51</p> <p>Email targeted to alumni</p> <p>Image</p> <p>New Request</p> <p>Leigh Gibbs</p>	 <p><b>Facebook Ad Graphic</b></p> <p>REQ#45</p> <p>Image: A group of diverse students discussing a case stud...</p> <p>Image</p> <p>In Revision</p> <p>Everett Crosse</p>	 <p><b>Facebook Ad Graphic</b></p> <p>REQ#1</p> <p>Theme: Campus Life</p> <p>Image</p> <p>Proof Review Complete</p> <p>Jordan Smith</p>	 <p><b>Instagram Graphic</b></p> <p>REQ#2</p> <p>Theme: Alumni Success</p> <p>Image</p> <p>Completed</p> <p>Hilda Wilson</p>	
<p><b>New Professor Business Card</b></p> <p>REQ#75</p> <p>Description: Create a business card for a general professor, ...</p> <p>Branded Document</p> <p>New Request</p> <p>Everett Crosse</p>	<p><b>Student News</b></p> <p>REQ#68</p> <p>Description: Create a weekly e-newsletter to keep students ...</p> <p>Branded Document</p> <p>Assigned for Build</p> <p>Everett Crosse</p>	 <p><b>Instagram Ad</b></p> <p>REQ#43</p>	<p><b>Research and Innovation</b></p> <p>REQ#55</p> <p>Description: Create a brochure or catalog highlighting the ...</p> <p>Branded Document</p> <p>Approved - Ready for DAM</p> <p>Everett Crosse</p>	
<p><b>Student Handbook</b></p> <p>REQ#53</p>	<p><b>Instagram Ad</b></p> <p>REQ#43</p>			

# Status | Routing/Revision Status



(13) Request Tracker - Smart... x +

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm1?view=grid&timelineGroupBy=none

Request Tracker / Manage Automation Workflows

### [CHANGE CELL] When "Routing Status" changes, update "Status" column

Trigger: When rows are added or changed

When Any field changes

Run workflow: When triggered

Conditions (1): Where Routing Status is one of

- New Request
- In Revision, Assigned for Build
- Legal Review, In Review, Proof Review Complete
- Approved - Ready for DAM, Completed

Change cell value: Change cell value in: Status

- Submitted
- With Creative/Designer
- In Review
- Complete

Cancel Save

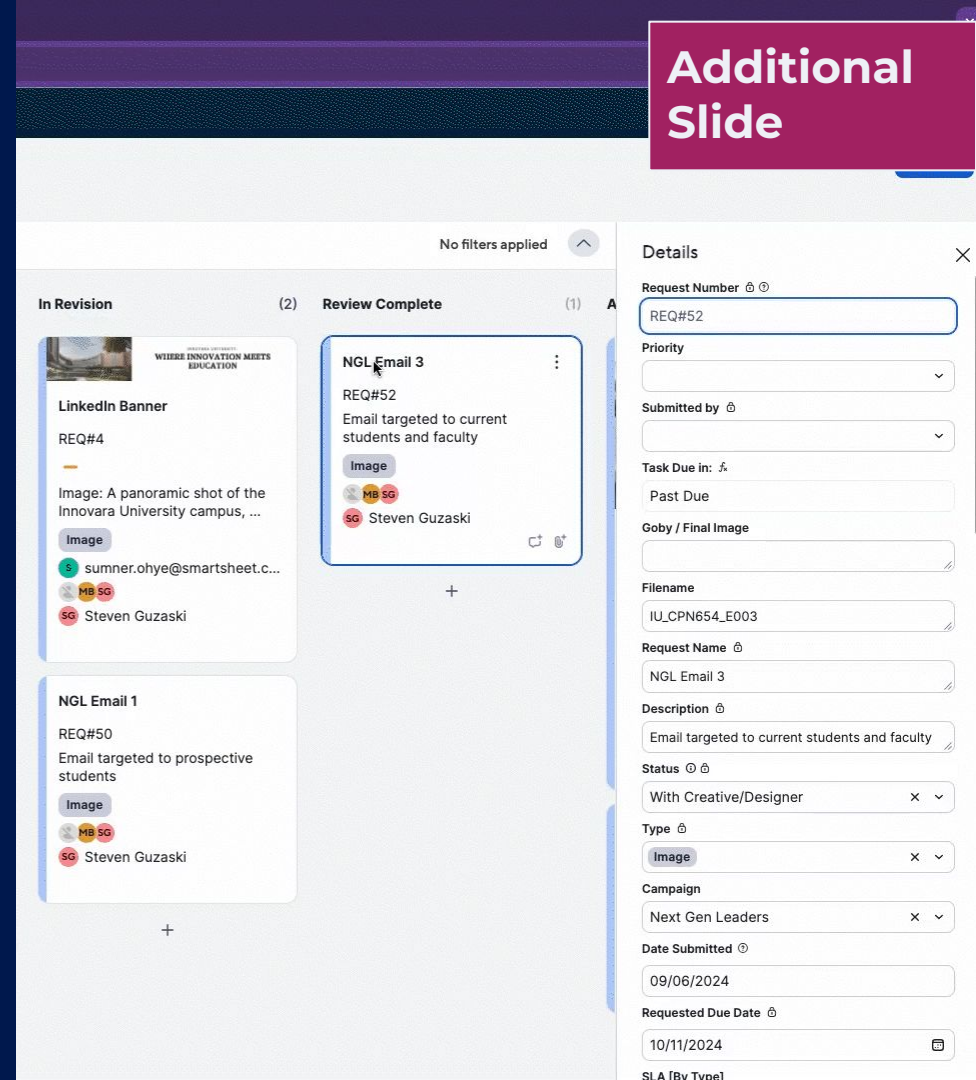
## Auto-fill dates

**What:** Workflow to automatically stamp the date when a particular column is updated.

**Why:** Having a “Stage Due Date” column means that there will always be a due date for each phase.

### How:

1. **Create** 3 Columns
  - a. Routing Status Changed [date]
  - b. Days to complete task [text]
  - c. Stage Due Date [date]
2. Create **workflow** to change date in “Routing Status Changed” column



Additional Slide

The screenshot shows a Smartsheet interface for a 'Request Tracker' grid. The grid has several columns: 'Expected Due Date', 'Due Date Needs Review', 'Req Date / SLA Differ...', 'HOT JOB Appro...', 'Request... Depart...', 'Assigned to', 'Approver', 'Reviewers', 'Approval', 'Routing Status', 'Routing Status Changed', 'Days to complete task', 'Stage Due Date', 'Date Approved', 'In Progress', and 'Up Brz'. The 'Routing Status Changed', 'Days to complete task', and 'Stage Due Date' columns are highlighted in light yellow. The grid contains 6 rows of data. The browser address bar shows the URL: app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid.

	Expected Due Date	Due Date Needs Review	Req Date / SLA Differ...	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers	Approval	Routing Status	Routing Status Changed	Days to complete task	Stage Due Date	Date Approved	In Progress	Up Brz
1	11/07/24	✗	10	🔥		Jordan Smith	Steven Guzaski	Devon Gomez, Hazel Christensen, Kai Senjima		Approved - Ready for D					<input type="checkbox"/>	
2	10/25/24	✓				Hilda Wilson	Steven Guzaski	Dominick George, Kelly Smart, Tygre Morehart		Legal Review					<input type="checkbox"/>	
3	11/07/24	✓				Hilda Wilson	Steven Guzaski	Eugene Oliver, Leigh Gibbs, Tamika Marshall	Requires Changes	In Review					<input type="checkbox"/>	
4	10/25/24	✓				Jose Price	Steven Guzaski	Everett Crosse, Shirley Huson		In Review					<input type="checkbox"/>	
5	10/28/24	✓				Eugene Oliver	Steven Guzaski	Helen Bates, Hilda Wilson, Jamal King		Legal Review					<input type="checkbox"/>	
6	10/22/24	⚠	1			Everett Crosse	Rajiv Arunkundram	Karen Pytel		Approved - Ready for D					<input type="checkbox"/>	

Auto-fill dates: New Columns

# Additional Slide

The screenshot shows a Smartsheet automation workflow configuration window titled "[DATE] Record date when 'Routing Status' changes". The configuration is as follows:

- Trigger:** When rows are added or changed
- When:** Routing Status changes to: Any Value
- Run workflow:** When triggered
- Action:** Record a date in: Routing Status Changed

Buttons for "Cancel" and "Save" are visible at the bottom right of the configuration window.

Auto-fill dates: Automation setup

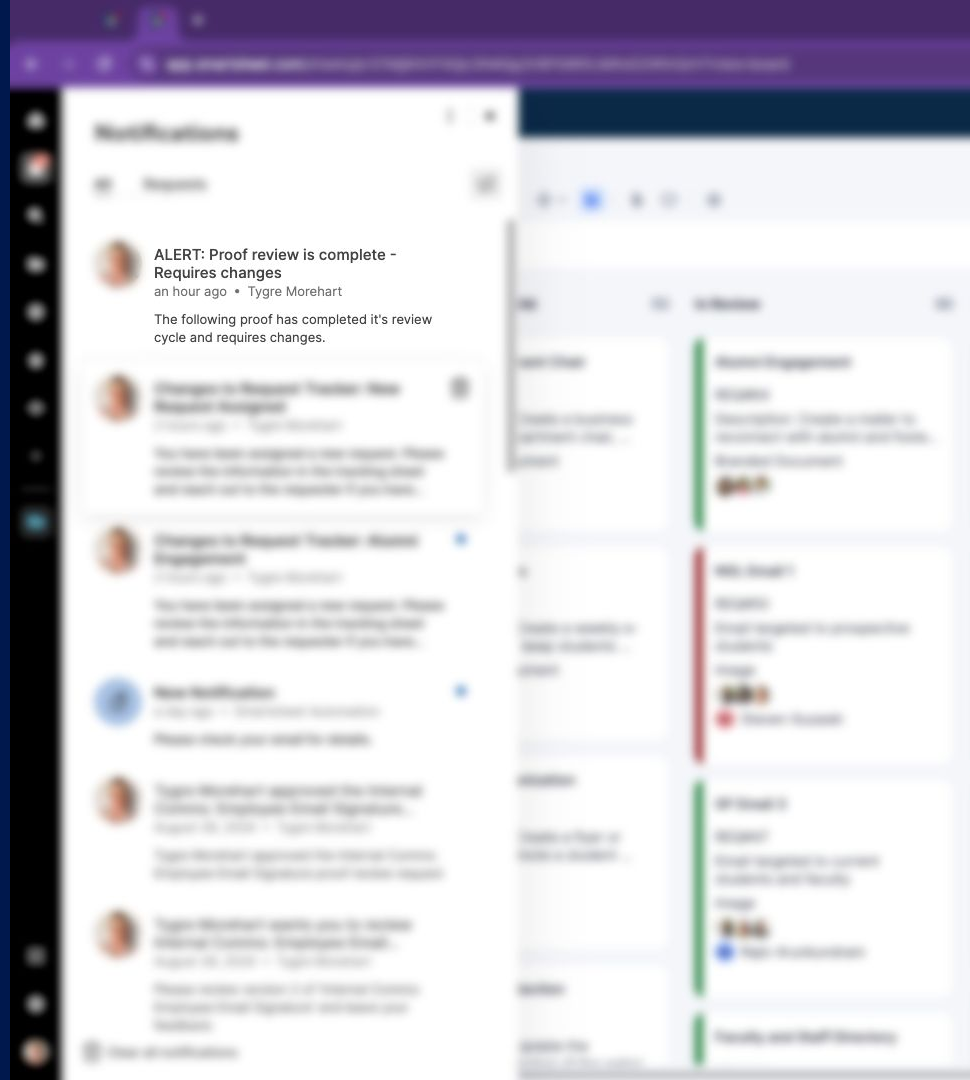
# Review is Complete

**What:** Notification and/or update routing status when proof review is complete.

**Why:** Having a stage specifically for review complete can be handy for several reasons.

- Alert routing person
- Arrange on board view to show task required

**How:** Workflow can include both steps. When “Pending approval” changes, update “Routing Status” and alert Jordan that review is complete.



# Additional Slide

### Notifications

All Requests

**ALERT: Proof review is complete - Requires changes**  
September 11, 2024 • Tygre Morehart

The following proof has completed its review cycle and requires changes.

**ALERT: Proof review is complete - Requires changes**  
9/11/24 3:16 PM

**Request Tracker**

The following proof has completed its review cycle and requires changes.

Changes since 9/11/24 3:16 PM

Rows:  
1 updated

Rows  
1 added or updated (shown in yellow)

Row 13

Filename	IU_CPN655_E002
Request Name	GF Email 2
Description	Email targeted to alumni
Type	Email
Category	Email
Reviewers	Dominick George, Karen Pytel, Shirley Huson
Approved By	
Changes Required By	Dominick George, karen.pytel@savvas.com, Shirley Huson
Pending Approval From	
Routing Status	In Review

Changes made by **Tygre Morehart**

You are receiving this notification because you are subscribed to a workflow "[ALERT & CHANGE CELL] Update Status when proof is complete" (ID# 1794258828060548) on sheet **Request Tracker**.

No filters applied

(4) **Proof Review Complete** (4) **Legal Review** (4) **Approved - Re**

**New Research Scientist**  
REQ#77  
Description: Create a business card for a professor who is also ...  
Branded Document

**Academic Programs**  
REQ#54  
Description: Create a catalog showcasing the university's ...  
Branded Document

**Donor Relations**  
REQ#66  
Description: Create a mailer to thank donors and encourage ...  
Branded Document

**Alumni Portal**  
REQ#61  
Description: Create or update an alumni portal to provide alumni

**Instagram Graphic**  
REQ#2  
Theme: Alumni Success ...  
Image  
Tygre Morehart  
Steven Guzaski

**Facebook A**  
REQ#1  
Theme: Can ...  
Image  
Tygre M  
Steven C

**X Ad**  
REQ#5



# Additional Slide

The screenshot shows a Gmail interface with an email from Smartsheet Automation. The email subject is "ALERT: Proof review is complete - Requires changes". The sender is Smartsheet Automation. The email content includes the MBFCORP logo and a message stating that a proof review cycle is complete and requires changes. A link to "Request Tracker" is provided, showing changes since 9/11/24, 3:16 PM. The changes include 1 row changed and 1 row added or updated (shown in yellow). The updated row details are as follows:

Row 13	
Filename	IU_CPN655_E002
Request Name	GF Email 2
Description	Email targeted to alumni
Type	Image
Category	Email
Reviewers	Dominick George, Karen Pytel, Shirley Huson
Approved By	
Changes Required By	Dominick George, <a href="mailto:karen.pytel@savvas.com">karen.pytel@savvas.com</a> , Shirley Huson

Review is Complete: Email

# Additional Slide

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm1?view=grid

Request Tracker / Manage Automation Workflows

### [ALERT & CHANGE CELL] Update Status when proof is complete

Trigger: When rows are added or changed

When Proof Status changes to:  
Approved Requires Changes  
+ Specify another change

Run workflow: When triggered

Conditions (1):  
Where Proof Status is one of:  
Requires Changes  
+ Add another condition

Conditions (1):  
Where Proof Status is one of:  
Approved  
+ Add another condition

Otherwise

Alert someone  
Send to specific people  
Jordan Smith

Alert someone  
Send to specific people  
Jordan Smith

Cancel Save

Last modified by Tygre Morehart on Sep 6, 2024, 12:57 PM

# Additional Slide

The screenshot shows a Smartsheet automation workflow editor for a workflow titled "[ALERT & CHANGE CELL] Update Status when proof is complete". The workflow is configured with two parallel paths:

- Path 1 (Left):**
  - Starts with a blue plus icon and a downward arrow.
  - Condition: "+ Add another condition".
  - Action: "Alert someone" with a bell icon. Sub-action: "Send to specific people" with "Jordan Smith" selected.
  - Message: "ALERT: Proof review is complete - Requires chan...". Body: "The following proof has completed it's review cycle and requires changes. Includes sheet links, 10 fields".
  - Next step: Blue plus icon and downward arrow.
  - Action: "Change cell value" with a pencil icon. Sub-action: "Change cell value in: Routing Status" with "Proof Review Complete" selected.
  - Next step: Blue plus icon and downward arrow.
- Path 2 (Right):**
  - Starts with a blue plus icon and a downward arrow.
  - Condition: "+ Add another condition".
  - Action: "Alert someone" with a bell icon. Sub-action: "Send to specific people" with "Jordan Smith" selected.
  - Message: "ALERT: Proof review is complete - Approved". Body: "The following proof has completed it's review cycle and requires changes. Includes sheet links, 10 fields".
  - Next step: Blue plus icon and downward arrow.
  - Action: "Change cell value" with a pencil icon. Sub-action: "Change cell value in: Routing Status" with "Proof Review Complete" selected.
  - Next step: Blue plus icon and downward arrow.

At the bottom right of the editor are "Cancel" and "Save" buttons. At the bottom left of the overall interface, it says "Last modified by Tygre Morehart on Sep 6, 2024, 12:57 PM".

# Additional Slide

The screenshot shows the Smartsheet automation workflow editor for a workflow titled "[CHANGE CELL] Update Status when proof is complete". The workflow is configured as follows:

- Trigger:** When rows are added or changed
- When Proof Status changes to:** Approved, Requires Changes
- Run workflow:** When triggered
- Conditions (1):** Where Proof Status is one of: Requires Changes, Approved
- Action:** Change cell value in: Routing Status, Proof Review Complete

The workflow is visually represented by a flowchart with a trigger box, a conditions box, and an action box, connected by arrows. There is also an "Otherwise" box branching from the conditions box.

At the bottom of the editor, it shows: "Last ran on Sep 20, 2024, 11:57 AM" and "Last modified by Tygre Morehart on Sep 11, 2024, 2:47 PM".

Review is Complete: Update Routing Status

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJmhxG2WhrQm1?view=board&cardViewByColumnId=6859637858193284

MBFCORP Request Tracker Help & feedback Share

Board Filter Routing Status

Saved filters + Add a filter No filters applied

(4) Assigned for Build	(5) In Review	(6) In Revision	(1) Proof Review Complete (17)	Legal Review	(2) Approved - Ready for DAM (2)
<p><b>Business Card</b></p> <p><b>New Department Chair</b> REQ#76 Description: Create a business card for a department chair, ... Branded Document Eugene Oliver</p> <p><b>Student News</b> REQ#68 Description: Create a weekly e-newsletter to keep students ... Branded Document Everett Crosse</p> <p><b>Student Organization</b> REQ#81 Description: Create a flyer or poster to promote a student ... Graphic Leigh Gibbs</p> <p><b>Admissions Section</b> REQ#59 Description: Update the admissions section of the website</p>	<p>Jose Price</p> <p><b>Donor Updates</b> REQ#71 Description: Create a quarterly e-newsletter to thank donors and ... Branded Document Leigh Gibbs</p> <p><b>GF Email 2</b> REQ#48 Email targeted to alumni Image Jose Price</p> <p><b>Faculty and Staff Directory</b> REQ#60 Description: Create or update a faculty and staff directory to ... Web Leigh Gibbs</p>	<p><b>Facebook Ad Graphic</b> REQ#45 Image: A group of diverse students discussing a case stud... Image Everett Crosse</p>	<p><b>Facebook Ad Graphic</b> REQ#1 Theme: Campus Life ... Image Jordan Smith</p> <p><b>New Research Scientist</b> REQ#77 Description: Create a business card for a professor who is also ... Branded Document Tamika Marshall</p> <p><b>Academic Programs</b></p>	<p><b>Faculty and Staff Updates</b> REQ#69 Description: Create a monthly e-newsletter to provide faculty an... Branded Document Hilda Wilson</p> <p><b>Job Fair</b> REQ#82 Description: Create a flyer or poster to promote a job fair or ... Graphic Everett Crosse</p>	<p><b>Research and Innovation</b> REQ#55 Description: Create a brochure or catalog highlighting the ... Branded Document Everett Crosse</p> <p><b>Instagram Graphic</b> REQ#44 Image: A team of scientists or researchers working in a state-o... Image Hilda Wilson</p>

Review is Complete: Update Routing Status

## Turnaround time by “Type”

**What:** An automation that places the turnaround time based on the type of request

**Why:** We will use this column to identify if a new request has a reasonable due date.

**How:** An automation will place the number of days required to complete the type of asset.

Request Tracker ☆

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]
Website to provide a more	With Creative/D	Web	Website		09/04/24	12/10/24	20
Instructions, frequently asked							
or "Provide feedback on							
History to make it easier for	In Review	Web	Website		09/05/24	02/03/25	20
y with detailed profiles and							
sign" or "Submit updates to							
vide alumni with exclusive	In Review		Website		09/06/24	11/25/24	
s such as event							
vide feedback on portal							

# Additional Slide

name	Request Name	Description	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Expected Due Date
1	CPN654_SM001	Facebook Ad Graphic Theme: Campus Life Image: A vibrant image of students studying together in a modern library or collaborating on a project in a collaborative workspace. Text: "Innovate your future at Innovara University." Call to Action: "Learn More" or "Apply Now"	Complete	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24
2	CPN654_SM002	Instagram Graphic Theme: Alumni Success Image: A photo of a successful alumnus in their professional field, with a quote about their experience at Innovara University. Text: "Innovara alumni are making a difference." Call to Action: #InnovaraAlumni #SuccessStory	In Review	Image	Social Media	Next Gen Leaders	09/13/24	10/28/24	30	10/25/24
3	CPN654_SM003	Instagram Ad Theme: Academic Programs Image: A visually appealing graphic showcasing a specific academic program (e.g., engineering, business, arts). Text: "Discover your passion at Innovara University." Call to Action: "Explore Programs" or "Request Information"	In Review	Video	Social Media	Next Gen Leaders	09/26/24	11/21/24	30	11/07/24
4	CPN654_SM004	LinkedIn Banner Image: A panoramic shot of the Innovara University campus, highlighting modern architecture and beautiful surroundings. Text: "Innovara University: Where Innovation Meets Education" Call to Action: "Visit Our Website" or "Join Our Network"	In Review	Image	Social Media	Next Gen Leaders	09/13/24	10/29/24	30	10/25/24
5	CPN654_SM005	X Ad Theme: Student Life Image: A video showcasing the vibrant student life at Innovara University, including social events, clubs, and extracurricular activities. Text: "Experience the Innovara Difference" Call to Action: "Watch Video" or "Apply Now"	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24
6	CPN655_SM001	Facebook Ad Graphic Image: A group of diverse students discussing a case study in a modern classroom. Text: "Launch your business career at Innovara's School of Business."	Complete	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24

Turnaround time by "Type": Column

# Additional Slide

The screenshot shows the Smartsheet automation workflow editor for a workflow titled "[CHANGE CELL VALUE] Insert Turnaround Time by type".

- Trigger:** + When rows are added
- When:** Any field changes
- Run workflow:** When triggered

The workflow branches into three conditions based on the "Type" field:

- Condition 1:** Where Type is one of Branded Document, Powerpoint, Dashboard, Graphic. Action: Change cell value in Turnaround time... to 25.
- Condition 2:** Where Type is one of Image, Video. Action: Change cell value in Turnaround time... to 30.
- Condition 3:** Where Type is one of Report, Web, Data, Other. Action: Change cell value in Turnaround time... to 20.
- Otherwise:** No action defined.

Buttons at the bottom right: Cancel, Save.

Footer text: Last ran on Sep 12, 2024, 8:24 PM • Last modified by Tygre Morehart on Sep 11, 2024, 2:47 PM

Turnaround time by "Type": Automation setup



# Conditional Formatting







**What:** Conditional rules to help visually sort data

**Why:** Colors help visually interpret the data

**How:** Determine what information is important and how you want to visualize that information.

Request Tracker ☆

Arial 10 B I U ☰ ✎ 🔍 📄 📑 🗑️ 🔄 📧

Task Due in:	Goby / Final Image	Filename	Request Name	Description
Next 10 Days		IU_CPN654_SM001	Facebook Ad Graphic	Theme: Campus Life Image: A vibrant image of students studying and collaborating on a project in a collaborative workspace. Text: "Innovate your future at Innovara University" Call to Action: "Learn More" or "Apply Now"
Next 5 Days		IU_CPN654_SM002	Instagram Graphic	Theme: Alumni Success Image: A photo of a successful alumna in a professional setting, sharing her experience at Innovara University. Text: "Innovara alumni are making a difference" Call to Action: "#InnovaraAlumni #SuccessStories"
Next 5 Days		IU_CPN654_SM003	Instagram Ad	Theme: Academic Programs Image: A visually appealing graphic showcasing academic programs (e.g., engineering, business, arts). Text: "Discover your passion at Innovara University" Call to Action: "Explore Programs" or "Request Info"
Next 5 Days		IU_CPN654_SM004	LinkedIn Banner	Image: A panoramic shot of the Innovara University campus, showcasing its architecture and beautiful surroundings. Text: "Innovara University: Where Innovation Meets Tradition" Call to Action: "Visit Our Website" or "Join Our Community"
Next 5 Days		IU_CPN654_SM005	X Ad	Theme: Student Life Image: A video showcasing the vibrant student life at Innovara University, including social events, clubs, and extracurricular activities. Text: "Experience the Innovara Difference" Call to Action: "Watch Video" or "Apply Now"
Next 5 Days		IU_CPN655_SM001	Facebook Ad Graphic	Image: A group of diverse students discussing a project in a classroom. Text: "Launch your business career at Innovara University"

# Additional Slide

The screenshot shows the Smartsheet Request Tracker interface. A modal dialog for 'Conditional Formatting' is open, displaying a list of rules. The background table has columns: Request Number, Priority, Submitted by, Task Due in, Goby / Final Image, Filename, Request Name, Description, Status, and Type. The table contains 6 rows of data with varying colors (blue, red, green) based on the conditional formatting rules.

Request Number	Priority	Submitted by	Task Due in	Goby / Final Image	Filename	Request Name	Description	Status	Type
1	!	Tygre Moreha	Next 10 Days		IU_CPN654_SM001	Facebook Ad Graphic	Theme: Campus Life Image: A vibrant image of students studying together in a modern library or collaborating on a project in a collaborative workspace.	Complete	Image
2	!	Tygre Morehar	Past Due					In Review	Image
3	-	Tygre Morehar	Next 5 Days					In Review	Video
4	-	Tygre Morehar	Next 5 Days					In Review	Image
5	-	Tygre Morehar	Next 5 Days					In Review	Image
6		Tygre Moreha	Next 5 Days		IU_CPN655_SM001	Facebook Ad Graphic	Call to Action: "Watch Video" or "Apply Now" Image: A group of diverse students discussing a case study in a modern classroom. Text: "Launch your business career at Innovara's School of Business."	Complete	Image

### Conditional Formatting

Add New Rule

- If **Req Date / SLA Difference is a number** then apply **this format** to the **Req Date / SLA Difference column** abcde
- If **Req Date / SLA Difference is not a number** then apply **this format** to the **HOT\_JOB Approved column** abcde
- If **Req Date / SLA Difference is a number** and **HOT\_JOB Approved is blank** then apply **this format** to the **HOT\_JOB Approved column** abcde
- If **Task Due in is 'Past Due'** then apply **this format** to the **entire row** abcde
- If **Task Due in is 'Next 5 Days'** then apply **this format** to the **entire row** abcde
- If **Task Due in is 'Next 10 Days'** then apply **this format** to the **entire row** abcde
- If **Due Date Needs Review is 'No'** then apply **this format** to the **entire row** abcde
- If **Due Date Needs Review is 'Hold'** then apply **this format** to the **entire row** abcde

Note: higher rules take priority over lower rules.

Cancel OK



**Conditional Formatting  
Tip:**

**Consider  
Order**

The order of conditions is important

# More Automations

## Ideas of other automations

### **Auto assign designer/creative based on type**

Ex: You know which designer or creative will be assigned based on type of request

### **Time to complete task**

Ex: When review is complete, change cell to 1, meaning that the router has one day to review and assign to designer or legal

### **Clear cells**

Ex: If an asset is cancelled, certain cell data might be deleted to prevent skewing of metrics

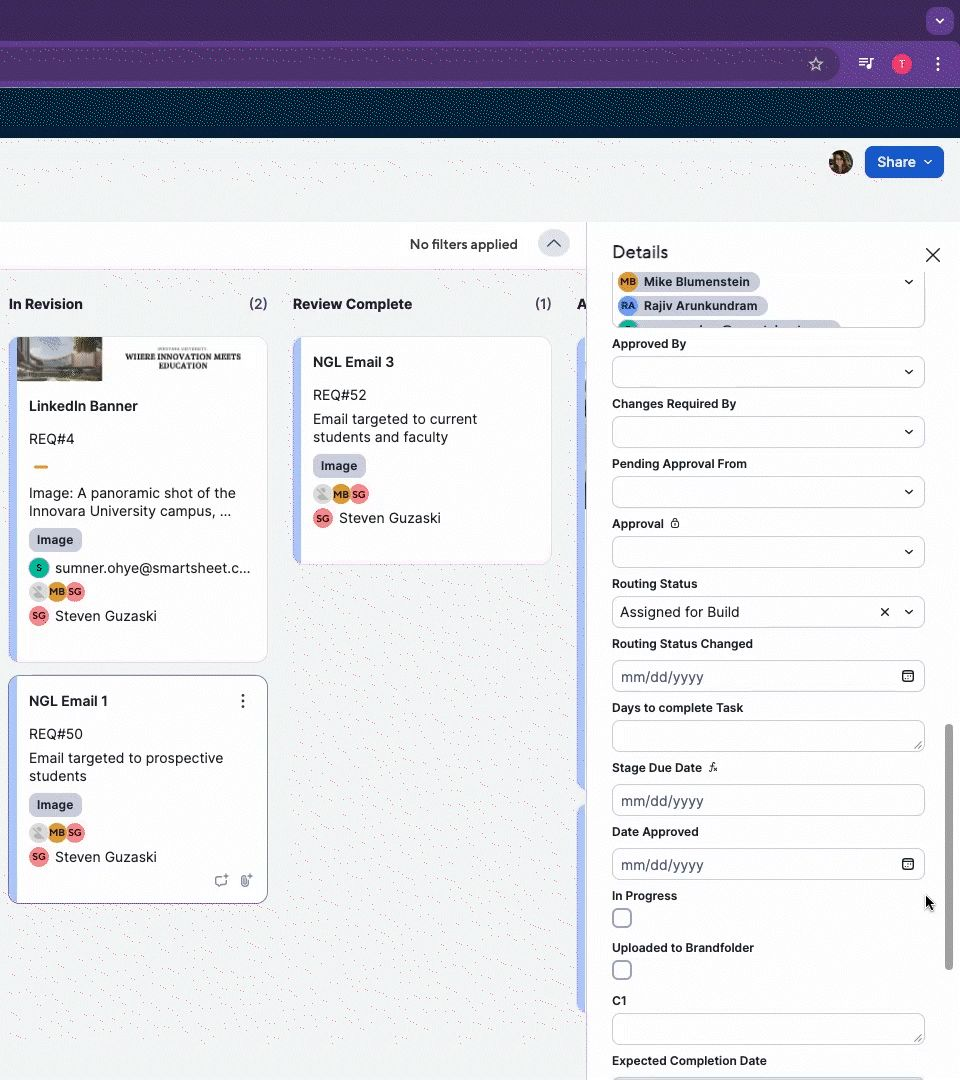
### **Move Rows**

Ex: When an asset is completed, move the row to an archive sheet

3

## Formula Magic

 smartsheet  
ENGAGE



# Routing stage due date

**What:** A formula that identifies when the current stage is due.

**Why:** We know when the final asset is expected, but it helps to know when each phase is due.

**How:** Workday formula that calculates the date stamp in the "Routing Status Changed" column plus the number of days in the "Days to Complete" column. The "Days to Complete" column must be updated for each phase.

# Additional Slide

app.smartsheet.com/sheets/7GRcwmf8jQRfRc9Whw6wXfXh6GGV7xCC78rPH9g1?view=grid

MBFCORP Request Tracker

	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers	Approval	Routing Status	Routing Status Changed	Days to complete task	Stage Due Date	Date Approved	In Progress	Uploaded to Brandfolder	Proof Info Col... >>>	Proof Status	Vers
1	🔥		JS Jordan Smith	SG Steven Guzaski	Devon Gomez Hazel Christensen Kai Senjima		Approved - Ready for	09/16/24	3	=IFERROR(WORKDAY([Routing Status Changed]@row, [Days to complete task]@row, ""))						
2			Hilda Wilson	SG Steven Guzaski	Dominick George Kelly Smart Tygre Morehart		Legal Review	09/11/24	1	09/12/24		<input type="checkbox"/>	<input type="checkbox"/>			
3			Hilda Wilson	SG Steven Guzaski	Eugene Oliver Leigh Gibbs Tamika Marshall		In Review	09/13/24	3	09/18/24		<input type="checkbox"/>	<input type="checkbox"/>			
4			Jose Price	SG Steven Guzaski	Everett Crosse Shirley Huson		In Review	09/13/24	3	09/18/24		<input type="checkbox"/>	<input type="checkbox"/>			
5			Eugene Oliver	SG Steven Guzaski	Helen Bates Jamal King Hilda Wilson		Legal Review	09/13/24	2	09/17/24		<input type="checkbox"/>	<input type="checkbox"/>			
6			Everett Crosse	RA Rajiv Arunkundram	Karen Pytel		Approved - Ready for	09/13/24	1	09/16/24		<input type="checkbox"/>	<input type="checkbox"/>			

Phase Due Date: Formula (IFERROR is added to keep the cell blank if there is no date)

app.smartsheet.com/sheets/7GRcwmf8jQRfRc9Whw6wXfXh6GGV7xCC78rPH9g1?view=grid

MBFCORP Request Tracker

	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers	Approval	Routing Status	Routing Status Changed	Days to complete task	Stage Due Date	Date Approved	In Progress	Uploaded to Brandfolder	Proof Info Col... >>>>	Proof Status	Vers
1	🔥		JS Jordan Smith	SG Steven Guzaski	Devon Gomez Hazel Christensen Kai Senjima		Approved - Ready for	09/16/24	3							
2			Hilda Wilson	SG Steven Guzaski	Dominick George Kelly Smart Tygre Morehart		Legal Review	09/11/24	1	09/12/24						
3			Hilda Wilson	SG Steven Guzaski	Eugene Oliver Leigh Gibbs Tamika Marshall		In Review	09/13/24	3	09/18/24						
4			Jose Price	SG Steven Guzaski	Everett Crosse Shirley Huson		In Review	09/13/24	3	09/18/24	Wednesday, September 18, 2024					
5			Eugene Oliver	SG Steven Guzaski	Helen Bates Jamal King Hilda Wilson		Legal Review	09/13/24	2	09/17/24						
6			Everett Crosse	RA Rajiv Arunkundram	Karen Pytel		Approved - Ready for	09/13/24	1	09/16/24						

```
=IFERROR(WORKDAY([Routing Status Changed]@row, [Days to complete task]@row), "")
```

Phase Due Date: Formula (IFERROR is added to keep the cell blank if there is no date)



# Complex Dates

## Example

**What: Each** routing phase has its own start date and due date columns.

**Why:** Useful when you need visibility into a projected due date and if something is on track. Breaking it down gives better insight to when a deliverable is ready and to see the impact.

**How:**

- Date column for each phase
- Formula to calculate SLA between each phase (Phase begin / Phase end)
- Due Date column (formula that calculates the due date - MAX formula)

app.smartsheet.com/sheets/w6W8MP69GRXgwwP3CH5vRRM2Jpv4wq7MqH53WJ1?view=grid

MBFCORP

K-5 Science Video Project

Share

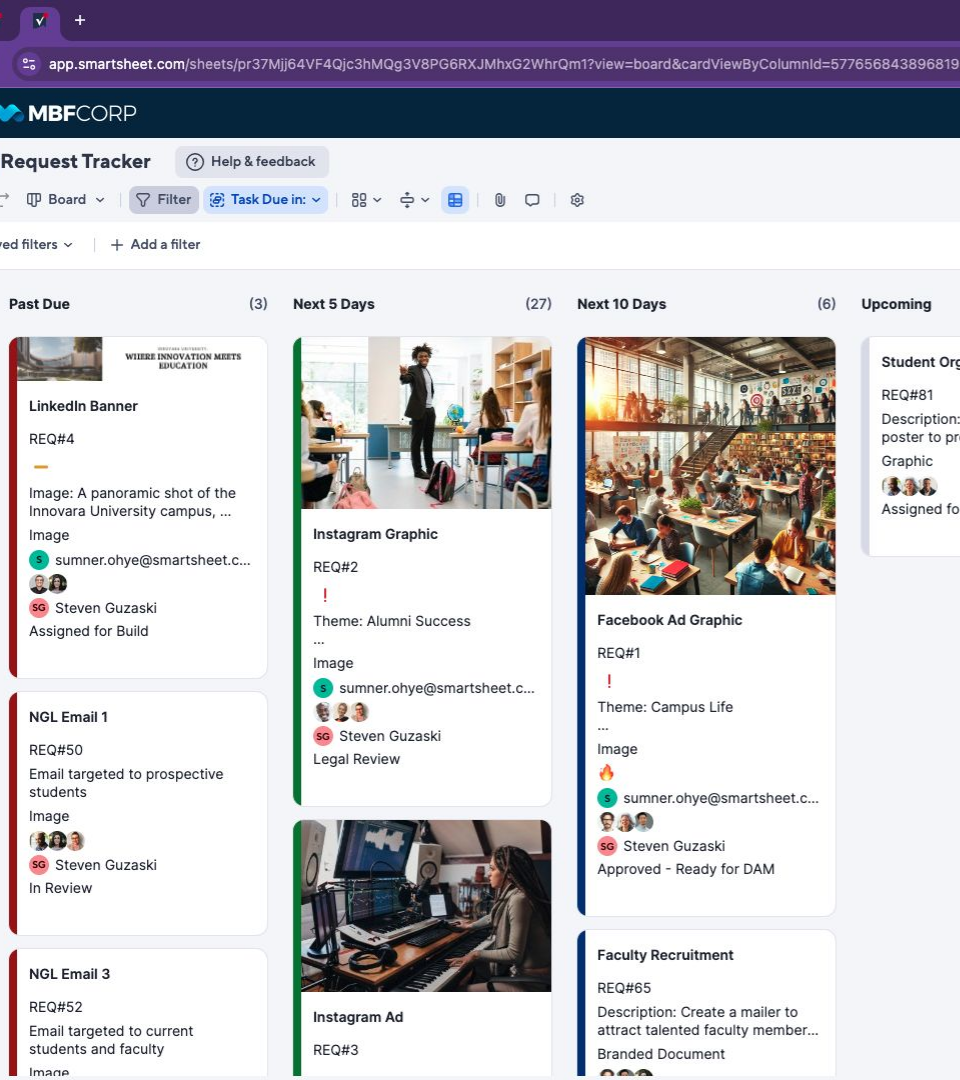
Unit/Chapter/Topic	Filename	Video Title	Reviewers	Status	Version	Pr... St...	Date Created	Script Approved	Sent for Editing	Projected Alpha Received	Sent for Alpha Review	Alpha Review Due Date	Projected Beta Received	Sent for Beta Review	Beta Review Due Dates
<b>Science Videos</b>															
- Grade 1															
Grade 1 Unit 1	G1U1_001V	Runaway Truck Ramp	Bruce Ferguson devon.gomez@mbfcorp.com	Alpha Review	3	Crea	11/02/23	11/19/23	11/26/23	12/01/23	10/27/23	11/01/23	11/08/23	11/14/23	11/16/23
Grade 1 Unit 2	G1U2_001V	Light to Dark	Bruce Ferguson devon.gomez@mbfcorp.com	In Production Alpha Review	2	Crea	11/18/23	11/11/23	11/10/23	11/17/23	11/18/23	11/22/23	11/29/23	11/31/23	11/31/23
Grade 1 Unit 3	G1U3_001V	Making Shadows	Bruce Ferguson devon.gomez@mbfcorp.com	Beta Review In Revision	1	Crea	11/17/23	11/11/23	11/10/23	11/17/23	11/17/23	11/22/23	11/29/23		
Grade 1 Unit 4	G1U4_001V	Does Heat Change Objects?	Bruce Ferguson devon.gomez@mbfcorp.com	Edits Completed Additional Review Approved	2	Crea	11/25/23	11/15/23	11/17/23	11/24/23	11/25/23	11/29/23	12/06/23	11/06/23	11/08/23
Grade 1 Unit 5	G1U5_001V	Reversible Changes	Bruce Ferguson devon.gomez@mbfcorp.com	In Production	1	Crea	11/25/23	11/15/23	11/17/23	11/24/23	11/25/23	11/29/23	12/06/23		
Grade 1 Unit 6	G1U6_001V	Making Pizza	Bruce Ferguson devon.gomez@mbfcorp.com	In Production	1	Crea	11/25/23	11/15/23	11/17/23	11/24/23	11/19/23	11/22/23	11/29/23		
- Grade 2															
Grade 2 Unit 1	G2U1_001V	Transfer of Energy	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/11/23	11/11/23	11/10/23	11/17/23	11/18/23	11/22/23	11/29/23		
Grade 2 Unit 2	G2U2_001V	Conductors and Insulators	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	2	Crea	11/11/23	11/11/23	11/10/23	11/17/23	11/18/23	11/22/23	11/29/23	11/30/23	12/02/23
Grade 2 Unit 3	G2U3_001V	Electrical Energy and Circuits	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	3	Crea	11/18/23	11/11/23	11/10/23	11/17/23	11/18/23	11/22/23	11/29/23	11/30/23	12/02/23
Grade 2 Unit 4	G2U4_001V	Energy Changes (popcorn)	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/24/23	11/15/23	11/17/23	11/24/23	11/24/23	11/29/23	12/06/23		
Grade 2 Unit 5	G2U5_001V	Electrical Energy and Circuits	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	2	Crea	11/24/23	11/15/23	11/17/23	11/24/23	11/24/23	11/29/23	12/06/23	11/06/23	11/08/23
Grade 2 Unit 6	G2U6_001V	Light	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/24/23	11/15/23	11/17/23	11/24/23	11/24/23	11/29/23	12/06/23	11/06/23	11/08/23
Grade 2 Unit 7	G2U7_001V	Forces In Motion	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/21/23	11/29/23	11/15/23	11/22/23	11/21/23	11/24/23	12/01/23		
Grade 2 Unit 8	G2U8_001V	Classify Objects	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/21/23	11/29/23	11/15/23	11/22/23	11/21/23	11/24/23	12/01/23		
Grade 2 Unit 9	G2U9_001V	Magnets	olivia.carter@mbfcorp.com, paul.finley@mbfcorp.com,	In Production	1	Crea	11/21/23	11/29/23	11/15/23	11/22/23	11/21/23	11/24/23	12/01/23		
Grade 2 Unit 10	G2U10_001V	Sorting Objects	olivia.carter@mbfcorp.com,	In Production				11/13/23	11/20/23	11/27/23					

Example of a sheet with complex status and date columns

# Complex Dates: How to set up

## Examples on the next slides

1. Create two date columns for each “routing status”. First column will have a date added automatically (see step 2) and the second will be a formula to indicate the due date (see step 3). Ex: First Column: “[Routing Stage] Sent”; Second Column: “[Routing Stage] Due”
2. Create an automation that adds the date to the first date column when the “routing status” changes.
3. Add a formula in the second date column that adds the SLA (or expected number of days to complete that phase) to the date in the first column. Use WORKDAY formula to ensure the date falls on a workday.
4. Repeat for each phase.
5. Add a date column that will calculate the due date no matter which phase the asset is in (this column will be used on reports and for the “Task due in” column so there’s only one due date that needs to be referenced).
6. Add a MAX formula to this column that looks across all date columns.



# Task Due in

**What:** Dropdown column with formula to identify when tasks are due (Past due, Due in the next 5 days, Due in the next 10 days, Upcoming)

**Why:** Using this column helps identify priority and tackle tasks in timely manner.

**How:** Create a dropdown column and then formula referencing the “Stage Due Date” column and today to identify when the task is due.

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid

MBFCORP

File Automation Forms Connections Dynamic View

Request Tracker ☆ Share

Grid View Filter Off Arial 10 B I U

	Request Number	Priority	Submitted by	Task Due in:	Goby / Final Image	Filename	Request Name	Description	Status	Type
17	REQ#65			Task Due in:			Faculty Recruitment	Description: Create a mailer to attract talented faculty members to the university. Text: "Join a world-class faculty at Innovara University. Discover opportunities for research, teaching, and professional development. Learn more about our competitive salaries and benefits." Call to Action: "Apply for a faculty position" or "Request more information"	With Creative/D	Branded Doc
18	REQ#66			Dropdown list			Donor Relations	Description: Create a mailer to thank donors and encourage continued support. Text: "Thank you for your generous support of Innovara University. Your contributions make a significant impact on our students, faculty, and campus community. Learn more about how your donation is making a difference." Call to Action: "Make a donation" or "Learn more about giving opportunities"	In Review	Branded Doc
19	REQ#68			Past Due Next 5 Days Next 10 Days Upcoming			Student News	Description: Create a weekly e-newsletter to keep students informed about campus events, academic news, and student life. Text: "Stay up-to-date on everything happening at Innovara University. Read the latest news about campus events, academic programs, and student organizations. Get involved and make the most of your college experience." Call to Action: "Subscribe to our e-newsletter" or "Check out our events calendar"	With Creative/D	Branded Doc
20	REQ#69						Faculty and Staff Updates	Description: Create a monthly e-newsletter to provide faculty and staff with important announcements, professional development opportunities, and recognition. Text: "Stay informed about the latest news and updates for faculty and staff at Innovara University. Learn about professional development opportunities, faculty awards, and important announcements." Call to Action: "Subscribe to our e-newsletter" or "View the faculty awards page"	In Review	Branded Doc
21	REQ#70						Alumni News	Description: Create a quarterly e-newsletter to keep alumni connected to the university and each other. Text: "Reconnect with Innovara University. Stay informed about alumni events, news, and opportunities. Learn about the latest achievements of your fellow alumni." Call to Action: "Subscribe to our e-newsletter" or "Register for our alumni reuni	Complete	Branded Doc
22	REQ#71			Next 5 Days			Donor Updates	Description: Create a quarterly e-newsletter to thank donors and keep them informed about the impact of their gifts.	In Review	Branded Doc COUNT: 38

Task Due in: Dropdown column

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid

MBFCORP

Request Tracker

Share

	Request Number	Priority	Submitted by	Task Due in:	Goby / Final Image	Filename	Request Name	Description
17	REQ#65						Faculty Recruitment	<p>Description: Create a mailer to attract talented</p> <p>Text: "Join a world-class faculty at Innovara Ur research, teaching, and professional developr competitive salaries and benefits."</p> <p>Call to Action: "Apply for a faculty position" or "</p>
18	REQ#66						Donor Relations	<p>Description: Create a mailer to thank donors at</p> <p>Text: "Thank you for your generous support of contributions make a significant impact on our community. Learn more about how your donati</p> <p>Call to Action: "Make a donation" or "Learn mo</p>
19	REQ#68						Student News	<p>Description: Create a weekly e-newsletter to ki campus events, academic news, and student i</p> <p>Text: "Stay up-to-date on everything happening latest news about campus events, academic p organizations. Get involved and make the mos</p> <p>Call to Action: "Subscribe to our e-newsletter" i calendar"</p>
20	REQ#69						Faculty and Staff Updates	<p>Description: Create a monthly e-newsletter to p important announcements, professional develp recognition.</p> <p>Text: "Stay informed about the latest news and Innovara University. Learn about professional i awards, and important announcements."</p> <p>Call to Action: "Subscribe to our e-newsletter" i</p>
21	REQ#70						Alumni News	<p>Description: Create a quarterly e-newsletter to university and each other.</p> <p>Text: "Reconnect with Innovara University. Sta news, and opportunities. Learn about the lates alumni."</p> <p>Call to Action: "Subscribe to our e-newsletter" i</p>
22	REQ#71						Donor Updates	<p>Description: Create a quarterly e-newsletter to informed about the impact of their gifts.</p>

**Formulas**

Conditional formula, if [Stage Due Date] is in the next 5 days, "Next 5 Days", if [Stage Due Date] is in the next 10 days, "Next 10 Days", if [Stage Due Date] is past due, "Past Due", otherwise, "Upcoming".

**Regenerate**

**Output**

```
=IF([Stage Due Date]@row < TODAY(), "Past Due", IF([Stage Due Date]@row <= TODAY() + 5, "Next 5 Days", IF([Stage Due Date]@row <= TODAY() + 10, "Next 10 Days", "Upcoming")))
```

**Apply to selected call**

The formula checks if [Stage Due Date] is before today, within the next 5 days, within the next 10 days, or later, and returns the corresponding category.

**Does this formula work for you?**

Giving feedback shares your prompt and output with Smartsheet. [Learn more](#)

Task Due in: column, using AI to help build the formula

# Additional Slide

	Request Number	Priority	Submitted by	Task Due in:	Goby / Final Image	Filename	Request Name	Description	Status	Type
17	REQ#65			Next 10 Days			Faculty Recruitment	Description: Create a mailer to attract talented faculty members to the university. Text: "Join a world-class faculty at Innovara University. Discover opportunities for research, teaching, and professional development. Learn more about our competitive salaries and benefits." Call to Action: "Apply for a faculty position" or "Request more information"	With Creative/D	Branded Doc
18	REQ#66			=IF([Stage Due Date]@row < TODAY(), "Past Due", IF([Stage Due Date]@row <= TODAY() + 5, "Next 5 Days", IF([Stage Due Date]@row <= TODAY() + 10, "Next 10 Days", "Upcoming")))				Large continued support. University. Your faculty, and campus making a difference." giving opportunities"	In Review	Branded Doc
19	REQ#68			Next 5 Days			Student News	Description: Create a weekly e-newsletter to keep students informed about campus events, academic news, and student life. Text: "Stay up-to-date on everything happening at Innovara University. Read the latest news about campus events, academic programs, and student organizations. Get involved and make the most of your college experience." Call to Action: "Subscribe to our e-newsletter" or "Check out our events calendar"	With Creative/D	Branded Doc
20	REQ#69			Next 5 Days			Faculty and Staff Updates	Description: Create a monthly e-newsletter to provide faculty and staff with important announcements, professional development opportunities, and recognition. Text: "Stay informed about the latest news and updates for faculty and staff at Innovara University. Learn about professional development opportunities, faculty awards, and important announcements." Call to Action: "Subscribe to our e-newsletter" or "View the faculty awards page"	In Review	Branded Doc
21	REQ#70			Next 5 Days			Alumni News	Description: Create a quarterly e-newsletter to keep alumni connected to the university and each other. Text: "Reconnect with Innovara University. Stay informed about alumni events, news, and opportunities. Learn about the latest achievements of your fellow alumni." Call to Action: "Subscribe to our e-newsletter" or "Register for our alumni reuni	Complete	Branded Doc
22	REQ#71			Next 5 Days			Donor Updates	Description: Create a quarterly e-newsletter to thank donors and keep them informed about the impact of their gifts.	In Review	Branded Doc

Task Due in: formula

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrOm?view=grid

MBFCORP

Request Tracker

Share

	Request Number	Priority	Submitted by	Task Due in:	Goby / Final Image	Filename	Request Name	Description	Status	Type
17	REQ#65			Next 10 Days			Faculty Recruitment	Description: Create a mailer to attract talented faculty members to the university. Text: "Join a world-class faculty at Innovara University. Discover opportunities for research, teaching, and professional development. Learn more about our competitive salaries and benefits." Call to Action: "Apply for a faculty position" or "Request more information"	With Creative/D	Branded Doc
18	REQ#66							Text: "Stay up-to-date on everything happening at Innovara University. Read the latest news about campus events, academic programs, and student organizations. Get involved and make the most of your college experience." Call to Action: "Subscribe to our e-newsletter" or "Check out our events calendar"	In Review	Branded Doc
19	REQ#68							Text: "Stay up-to-date on everything happening at Innovara University. Read the latest news about campus events, academic programs, and student organizations. Get involved and make the most of your college experience." Call to Action: "Subscribe to our e-newsletter" or "Check out our events calendar"	With Creative/D	Branded Doc
20	REQ#69			Next 5 Days			Faculty and Staff Updates	Description: Create a monthly e-newsletter to provide faculty and staff with important announcements, professional development opportunities, and recognition. Text: "Stay informed about the latest news and updates for faculty and staff at Innovara University. Learn about professional development opportunities, faculty awards, and important announcements." Call to Action: "Subscribe to our e-newsletter" or "View the faculty awards page"	In Review	Branded Doc
21	REQ#70			Next 5 Days			Alumni News	Description: Create a quarterly e-newsletter to keep alumni connected to the university and each other. Text: "Reconnect with Innovara University. Stay informed about alumni events, news, and opportunities. Learn about the latest achievements of your fellow alumni." Call to Action: "Subscribe to our e-newsletter" or "Register for our alumni reuni	Complete	Branded Doc
22	REQ#71			Next 5 Days			Donor Updates	Description: Create a quarterly e-newsletter to thank donors and keep them informed about the impact of their gifts.	In Review	Branded Doc

```
=IF([Stage Due Date]@row < TODAY(), "Past Due", IF([Stage Due Date]@row <= TODAY() + 5, "Next 5 Days", IF([Stage Due Date]@row <= TODAY() + 10, "Next 10 Days", "Upcoming")))
```

Task Due in: formula



Request Tracker ☆

us	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Expected Due Date	Due Date Needs Review	Req. Date SLA Diff
	Web	Website		09/04/24	12/10/24	20	10/02/24	✓	
Review	Web	Website		09/05/24	02/03/25	20	10/03/24	✓	
Review		Website		09/06/24	11/25/24				

# Projected due date

**What:** Formula that calculates the projected due date based on the submitted date and the turnaround time

**Why:** This date column is going to help us quickly identify any requests that may have a requested due date that is before our projected due date. This helps us have conversations early about any unrealistic requests.

**How:** Workday formula that calculates the submitted due date plus the turnaround time.

- Workday, Day Submitted, Turnaround time

Additional Slide

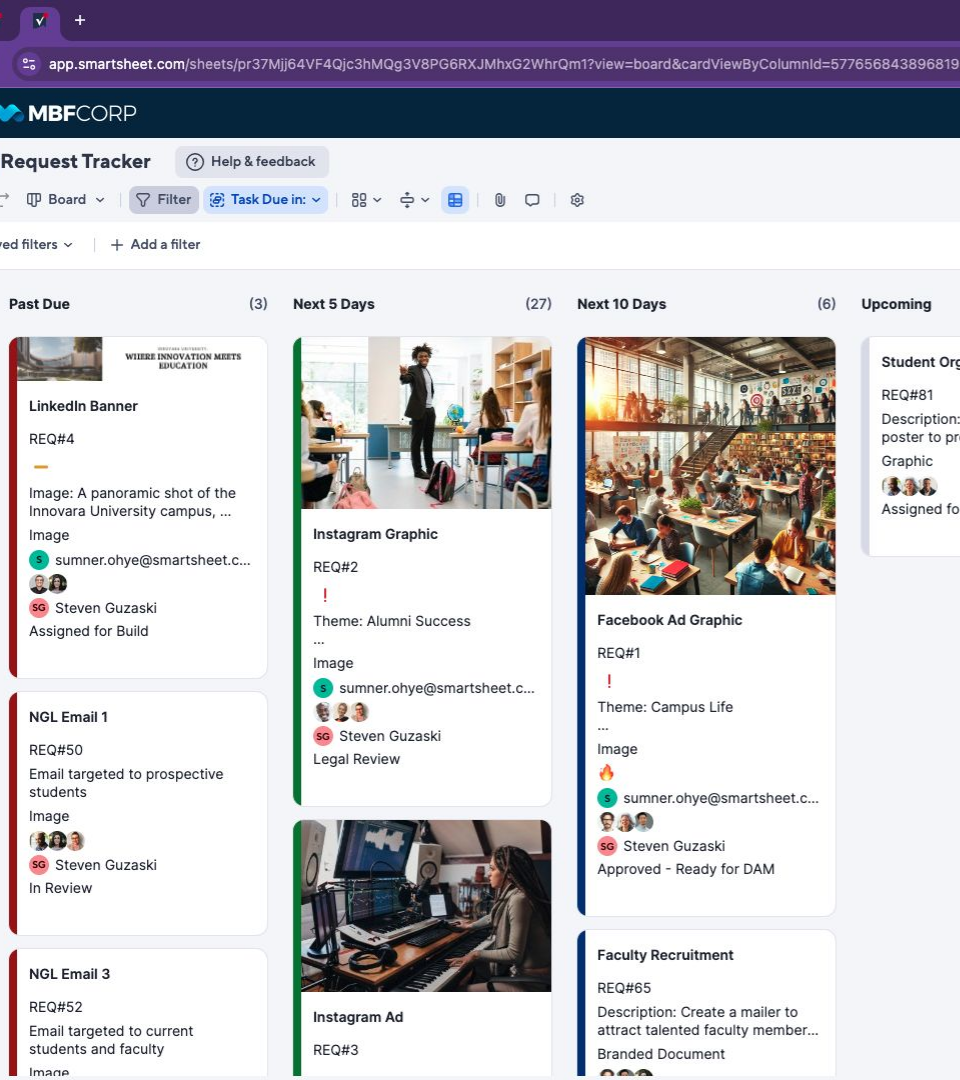
	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Differ...	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
10	Submitted	Image	Email	Next Gen Leaders	09/09/24	10/22/24	30	=IFERROR(WORKDAY([Date Submitted]@row, [Turnaround time [By Type]]@row, ""))					Everett Crosse	Steven Guzaski	Shirley Tygre, Everel Hazel, Karen Helen, Kai Se
11	Submitted	Image	Email	Next Gen Leaders	09/13/24	10/25/24	30	10/25/24	✓				Everett Crosse	Steven Guzaski	Helen, Kai Se
12	With Creative/D	Image	Email	Going Further	09/08/24	10/29/24	30	10/18/24	✓				Jose Price	Rajiv Arunkundram	Devon, Tygre
13	In Review	Image	Email	Going Further	08/29/24	10/22/24	30	10/10/24	✓				Jose Price	Rajiv Arunkundram	Domin, Tygre, Karen
14	Submitted	Image	Email	Going Further	09/11/24	10/24/24	30	10/23/24	✓				Tamika Marshall	Rajiv Arunkundram	Eugen, Hazel, Jamal
15	Complete	Branded Docu.	Mail		08/26/24	11/18/24	25	09/30/24	✓				Everett Crosse		Everel, Kelly
16	In Review	Branded Docu.	Mail		08/27/24	02/19/25	25	10/01/24	✓				Tamika Marshall		Helen, Tamika
17	With Creative/D	Branded Docu.	Mail		08/28/24	01/14/25	25	10/02/24	✓				Tamika Marshall		Devon, Shirley

Projected due date: formula

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Differ...	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
10	Submitted	Image	Email	Next Gen Leaders	09/09/24	10/22/24	30							Steven Guzaski	Shirley Tygre, Everel Hazel, Karen
11	Submitted	Image	Email	Next Gen Leaders	09/13/24	10/25/24	30							Steven Guzaski	Helen Kai Se, Devon Tygre
12	With Creative/D	Image	Email	Going Further	09/08/24	10/29/24	30						Rajiv Arunkundram	Rajiv Arunkundram	Devon Tygre
13	In Review	Image	Email	Going Further	08/29/24	10/22/24	30	10/10/24	✓				Jose Price	Rajiv Arunkundram	Domin Karen
14	Submitted	Image	Email	Going Further	09/11/24	10/24/24	30	10/23/24	✓				Tamika Marshall	Rajiv Arunkundram	Eugen Hazel, Jamal
15	Complete	Branded Docu	Mail		08/26/24	11/18/24	25	09/30/24	✓				Everett Crosse		Everel Kelly S
16	In Review	Branded Docu	Mail		08/27/24	02/19/25	25	10/01/24	✓				Tamika Marshall		Helen Tamika
17	With Creative/D	Branded Docu	Mail		08/28/24	01/14/25	25	10/02/24	✓				Tamika Marshall		Devon Shirley

=IFERROR(WORKDAY([Date Submitted]@row, [Turnaround time \[By Type]]@row), "")

Tuesday, October 1, 2024



# Requested due date flag

**What:** A dropdown column that will indicate when a request needs reviewed because the requested delivery date is before the projected due date.

**Why:** Quickly identify and address any potential concerns.

**How:** 2 formula columns :

- Req Date / SLA Difference [text]
  - Networkday formula, requested due date, projected due date, -1
- Due Date Needs Review [symbol]
  - If Req Date / SLA Difference is greater than 6, "Red", if less than 6, "Yellow", otherwise, "green"

# Additional Slide

The screenshot shows a Smartsheet spreadsheet titled "Request Tracker". The spreadsheet has columns for Status, Type, Category, Campaign, Date Submitted, Requested Due Date, Turnaround time (By Type), Projected Due Date, Due Date Needs Review, Req Date / SLA Difference, HOT JOB Appro..., Request... Depart..., Assigned to, Approver, and Reviewers. A tooltip is visible over the "Req Date / SLA Difference" column for row 5, displaying the formula: `=NETWORKDAYS([Projected Due Date]@row, [Requested Due Date]@row) - 1`. The spreadsheet also shows various icons for actions like copy, paste, and undo, and a sidebar with navigation options.

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time (By Type)	Projected Due Date	Due Date Needs Review	Req Date / SLA Difference	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	x		Jordan Smith	Steven Guzaski	Devon Gomez, Hazel Christensen, Kai Senjima
5	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24	✔	0					Helen Bates, Hilda Jamal King
6	In Review	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24	⚠	-3			Everett Crosse	Rajiv Arunkundram	Karen Pytel
7	In Review	Image	Social Media	Going Further	09/13/24	10/25/24	30	10/25/24	✔	0			Hilda Wilson	Rajiv Arunkundram	Devon Gomez, Kelly Smart
8	Submitted	Video	Social Media	Going Further	09/18/24	10/31/24	30	10/30/24	✔	1			Erinane Oliver	Rajiv Arunkundram	Dominick George

Requested due date flag: Req Date/SLA Difference formula

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Differ...	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	x		Jordan Smith	Steven Guzaski	Devon Gomez Hazel Christensen Kai Senjima
5	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24	✔						Helen Bates Jamal King
6	In Review	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24	⚠	-3			Everett Crosse	Rajiv Arunkundram	Karen Pytel
7	In Review	Image	Social Media	Going Further	09/13/24	10/25/24	30	10/25/24	✔	0			Hilda Wilson	Rajiv Arunkundram	Devon Gomez Kelly Smart
8	Submitted	Video	Social Media	Going Further	09/18/24	10/31/24	30	10/30/24	✔	1			Erinane Oliver	Rajiv Arunkundram	Dominick George

=NETWORKDAYS([Projected Due Date]@row, [Requested Due Date]@row) - 1

# Additional Slide

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Difference	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	x		Jordan Smith	Steven Guzaski	Devon Gomez Hazel Christensen Kai Senjima
5	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24	=IF((Req Date / SLA Difference)@row > -1, "Yes", IF((Req Date / SLA Difference)@row > -6, "Hold", IF((Req Date / SLA Difference)@row < -5, "No", "")))						
6	In Review	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24	⚠	-3	🔥		Everett Crosse	Rajiv Arunkundram	Karen Pytel
7	In Review	Image	Social Media	Going Further	09/13/24	10/25/24	30	10/25/24	✔	0			Hilda Wilson	Rajiv Arunkundram	Devon Gomez Kelly Smart
~	Submitted	Video	Social Media	Going Further	09/18/24	10/31/24	30	10/30/24	✔	1			Erinane Oliver	Rajiv Arunkundram	Dominick George

Requested due date flag: Due Date Needs Review formula

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid&filterid=1584870401724292

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Request Tracker

Share

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Difference	HOT JOB Appro...	Request... Depart...	Assigned to	Approver	Reviewers
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	x		Jordan Smith	Steven Guzaski	Devon Gomez Hazel Christensen Kai Senjima
5	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24							
6	In Review	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24	⚠	-3	🔥		Everett Crosse	Rajiv Arunkundram	Karen Pytel
7	In Review	Image	Social Media	Going Further	09/13/24	10/25/24	30	10/25/24	✔	0			Hilda Wilson	Rajiv Arunkundram	Devon Gomez Kelly Smart
~	Submitted	Video	Social Media	Going Further	09/18/24	10/31/24	30	10/30/24	✔	1			Erinane Oliver	Rajiv Arunkundram	Dominick George

=IF([Req Date / SLA Difference]@row > -1, "Yes", IF([Req Date / SLA Difference]@row > -6, "Hold", IF([Req Date / SLA Difference]@row < -5, "No", "")))

Requested due date flag: Due Date Needs Review formula





app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid

MBFCORP

Request Tracker

Share

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Differ...	HC : JOB Appro...	Request... Depart...	Assigned to	Approver
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	HOT JOB Approved			leven Guzaski
2	Complete	Image	Social Media	Next Gen Leaders	09/13/24	10/28/24	30	10/25/24	✔	1				leven Guzaski
3	In Review	Video	Social Media	Next Gen Leaders	09/26/24	11/21/24	30	11/07/24	✔	10				leven Guzaski
4	In Review	Image	Social Media	Next Gen Leaders	09/13/24	10/29/24	30	10/25/24	✔	2				leven Guzaski
5	In Review	Image	Social Media	Next Gen Leaders	09/16/24	10/30/24	30	10/28/24	✔	2				leven Guzaski
6	With Creative/L	Image	Social Media	Going Further	09/10/24	10/21/24	30	10/22/24	⚠	-3		Everett Crosse	Rajiv Arunkundrar	COUNT: 2

HC : JOB Appro...

Name

HOT JOB Approved

Column Type

Dropdown list

This column type can't be changed due to the following:

- It is being used in conditional formatting rules. [Edit conditional formatting rules](#)

Allow multiple values per cell

Restrict to list values only

Values

✖

Cancel Ok

Requested due date flag: HOT JOB Approved Column

app.smartsheet.com/sheets/pr37Mjj64VF4Qjc3hMQg3V8PG6RXJMhxG2WhrQm?view=grid&filterId=8840225812860804

MBFCORP

Request Tracker

Request Date needs Reviewed

	Status	Type	Category	Campaign	Date Submitted	Requested Due Date	Turnaround time [By Type]	Projected Due Date	Due Date Needs Review	Req Date / SLA Difference	HOT JOB Approved	Request... Depart...	Assigned to	Approver
1	In Review	Image	Social Media	Next Gen Leaders	09/26/24	10/24/24	30	11/07/24	✖	-12	✖		Jordan Smith	Steven Guzaski
6	With Creative/...	Image	Social M						⚠	-3	🔥		Everett Crosse	Rajiv Arunkundr
18	In Review	Branded Doc	Mail						⚠	-4			Leigh Gibbs	
41														
42														
43														
44														
45														
46														
47														
48														

**Edit Filter 'Request Date needs Reviewed'**

Name (Optional)  
Request Date needs Reviewed  Share filter

Show rows that match [all conditions](#)

Req Date / SLA Difference is less than 0

Select Field

Include parent rows

Cancel Apply

Requested due date flag: HOT JOB Approved Column



**Formula Tip:**

**=IFERROR(  
*[formula]*)), ""**

Use "IFERROR" to make any perceived errors blank. For example, some date formulas will throw an error if information is missing.



**Formula Tip:**

**Use AI!**



**Column Tip:**

# Consider a Dropdown

- type (single vs multi)
- Board view and grouped reports can only be used with single

4

## Schedule Snapshot

 smartsheet  
ENGAGE

1: Campaign Intake

JUL 01, 2024 TO JUN 30, 2025

Filter Off | QUARTER - | TODAY

Audience	Campaign Type	Q3 2024 Jul 01 to Sep 30	Q4 2024 Oct 01 to Dec 31	Q1 2025 Jan 01 to Mar 31	Q2 2025 Apr 01 to Jun 30
Prospective Students	Customer Growth	Innovate Your Future - New - Channels: Facebook,Instagram,LinkedIn,Twitter,Email,Print,Website,Campus Tours - 07/04/2024 to 10/11/2024			
	General Awareness		Spring Admissions - New - Channels: Facebook,Instagram,Twitter,Email,Print,Website,Campus Tours - 10/11/2024 to 01/03/2025		
			Innovara University: See What's New - Launched - Channels: Facebook,Instagram,LinkedIn,Twitter,YouTube,Display,Email - 10/02/2024 to 11/29/2024	Innovara University: Going Further - New - Channels: Facebook,Instagram,Twitter,YouTube - 03/05/2025 to 04/28/2025	
Students	Customer Retention	Student Life Highlights - Pending - Channels: Instagram,Twitter,Website - 07/29/2024 to 10/04/2024			
			Campus Safety and Security - Pending - Channels: Facebook,Print,Website - 11/12/2024 to 02/07/2025		
Alumni	Customer Engagement	Alumni Homecoming - Pending - Channels: Facebook,Email,Print,Campus Events - 07/31/2024 to 10/16/2024			
	Win-Back	Alumni Engagement - Pending - Channels: Facebook,LinkedIn,Email - 08/08/2024 to 10/18/2024			
Donors	Customer Engagement	Giving Tuesday - Pending - Channels: Facebook,Instagram,LinkedIn,Email,Website - 07/18/2024 to 11/12/2024			
Community	Customer Growth	Summer Programs - Pending - Channels: Facebook,LinkedIn,Email,Print,Website - 09/12/2024 to 01/10/2025			
	General Awareness	Innovara University: The Next Generation of Leaders - Pending - Channels: Facebook,Instagram,LinkedIn,Twitter,YouTube,Display,Email - 08/28/2024 to 11/29/2024			
		Career Services Success Stories - Pending - Channels: Facebook,LinkedIn,YouTube - 09/18/2024 to 11/29/2024			
Faculty	General Awareness	Faculty Spotlight - Pending - Channels: Facebook,Instagram,Website - 07/24/2024 to 11/08/2024			



# Additional Slide

1: Campaign Intake

JUL 01, 2024 TO JUN 30, 2025

Filter Off | QUARTER - | TODAY

### EDIT CALENDAR

1 2 3 Map Columns 4 5 6 7

The calendar will display data from Smartsheet based on your sheet columns and grouping.

Smartsheet Columns	Display	Custom Category List Order
Task Name: Campaign Name	<input type="checkbox"/>	Prospective Students
Task Owner: Owner	<input checked="" type="checkbox"/>	Students
Task Details: Campaign Status	<input checked="" type="checkbox"/>	Alumni
Task Start Date: Actual Start	<input type="checkbox"/>	Donors
Task End Date: Actual Finish	<input type="checkbox"/>	Community
Symbol: [Empty]	<input checked="" type="checkbox"/>	Faculty
<b>Data Grouping</b>		
Group Data By: Audience	<input checked="" type="checkbox"/>	
Secondary Grouping: Campaign Type	<input checked="" type="checkbox"/>	

Buttons: Basic, Cancel, Previous, Next

# Additional Slide

1 2 3 4 Additional Columns 5 6 7

Select additional columns for the calendar.

**Additional Columns**

Column 3: Campaign Name  Display

Column 4: Campaign Description  Display

Column 5: Channels  Display

Column 6: Audience  Display

Column 7: Budget\$  Display

**Sort Columns**

Column 1:  Order 1: Ascending

Column 2:  Order 2: Ascending

**Column Mapping**

MON	TUE
TASK NAME (owner) Task Owner Task details are listed here - Start Date to End Date	TASK NAME (owner) Task Owner Task details are listed here - Start Date to End Date
TASK NAME (owner) Task Owner Task details are listed here - Start Date to End Date	TASK NAME (owner) Task Owner Task details are listed here - Start Date to End Date

Buttons: Cancel, Previous, Next

# Additional Slide

1: Campaign Intake

JUL 01, 2024 TO JUN 30, 2025

Filter Off

QUARTER - TODAY

EDIT CALENDAR

1 2 3 4 5 6 More Options 7

Edit additional calendar options.


Calendar Name: 1: Campaign Intake

Start Day: Sunday

Quarter Start Month: January

Weekends: Ignore Weekends

Web Form Link: <https://app.smartsheet.com/t>

Logo: 

Upload New Logo:  No file chosen

Invert:

Hide Week Number:

Allow Attachments:

Allow Comments:

Allow New Events:

454 Calendar:

Default 454 Calendar:

Show Hide button:

Display all categories:

Site URLs

Cancel Previous Next

5

## Reining in Resources

 smartsheet  
ENGAGE

app.smartsheet.com/sheets/pr37Mj64VF4Qjc3hMQg3V8P6GRXJmXG2WhrQm?view=card&cardLevel=0&cardViewByColumnId=6859637858193284

MBFCORP

File Automation Forms Connections Dynamic View

Request Tracker ☆

Share

Card View Filter Off All Levels View by Routing Status

Unassigned (1)	New Request (6)	Assigned for Build (4)	In Review (7)	In Revision (4)	Proof Review Complete (4)	Legal Review (4)
	<p><b>Instagram Ad</b> REQ#43 "Image: A student celebrati... Submitted Video</p> <p><b>New Professor Business Card</b> REQ#75 Description: Create a busin... Submitted Branded Document</p> <p><b>Student Handbook</b> REQ#53 Description: Create a comp... Submitted Branded Document</p> <p><b>NGL Email 2</b> REQ#51 Email targeted to alumni Submitted Image</p> <p><b>GF Email 3</b> REQ#47 Email targeted to current st... Submitted Image</p> <p><b>NGL Email 3</b> REQ#52 Email targeted to current st... Submitted Image</p>	<p><b>New Department Chair</b> REQ#76 Description: Create a busin... With Creative/Designer Branded Document</p> <p><b>Student News</b> REQ#68 Description: Create a week... With Creative/Designer Branded Document</p> <p><b>Student Organization</b> REQ#81 Description: Create a flyer ... With Creative/Designer Graphic</p> <p><b>Admissions Section</b> REQ#59 Description: Update the ad... With Creative/Designer Web</p>	<p><b>NGL Email 1</b> REQ#50 Email targeted to prospecti... In Review Image</p> <p><b>Instagram Ad</b> REQ#3 Image</p> <p>Theme: Academic Program... In Review Video</p> <p><b>LinkedIn Banner</b> REQ#4 Image: A panoramic shot of... With Creative/Designer Image</p> <p><b>Donor Updates</b> REQ#71 Description: Create a quart... In Review Branded Document</p>	<p><b>Faculty Recruitment</b> REQ#65 Description: Create a mailer... With Creative/Designer Branded Document</p> <p><b>Homepage Redesign</b> REQ#58 Description: Redesign the u... With Creative/Designer Web</p> <p><b>GF Email 1</b> REQ#49 Email targeted to prospecti... With Creative/Designer Image</p> <p><b>Academic Program</b> REQ#80 Description: Create a flyer ... With Creative/Designer Graphic</p>	<p><b>New Research Scientist</b> REQ#77 Description: Create a busin... In Review Branded Document</p> <p><b>Academic Programs</b> REQ#54 Description: Create a catalo... In Review Branded Document</p> <p><b>Donor Relations</b> REQ#66 Description: Create a mailer... In Review Branded Document</p> <p><b>Alumni Portal</b> REQ#61 Description: Create or upda... In Review Web</p>	<p><b>Instagram Graphic</b> REQ#2 Image</p> <p>Theme: Alumni Succes... In Review Image</p> <p><b>X Ad</b> REQ#5 Image</p> <p>Theme: Student Life Im... In Review Image</p> <p><b>Faculty and Staff Upda</b> REQ#69 Description: Create a m... In Review Branded Document</p> <p><b>Job Fair</b></p>

### Resource Management

Request Tracker  
Tygre's RM

08/01/24 11/15/24

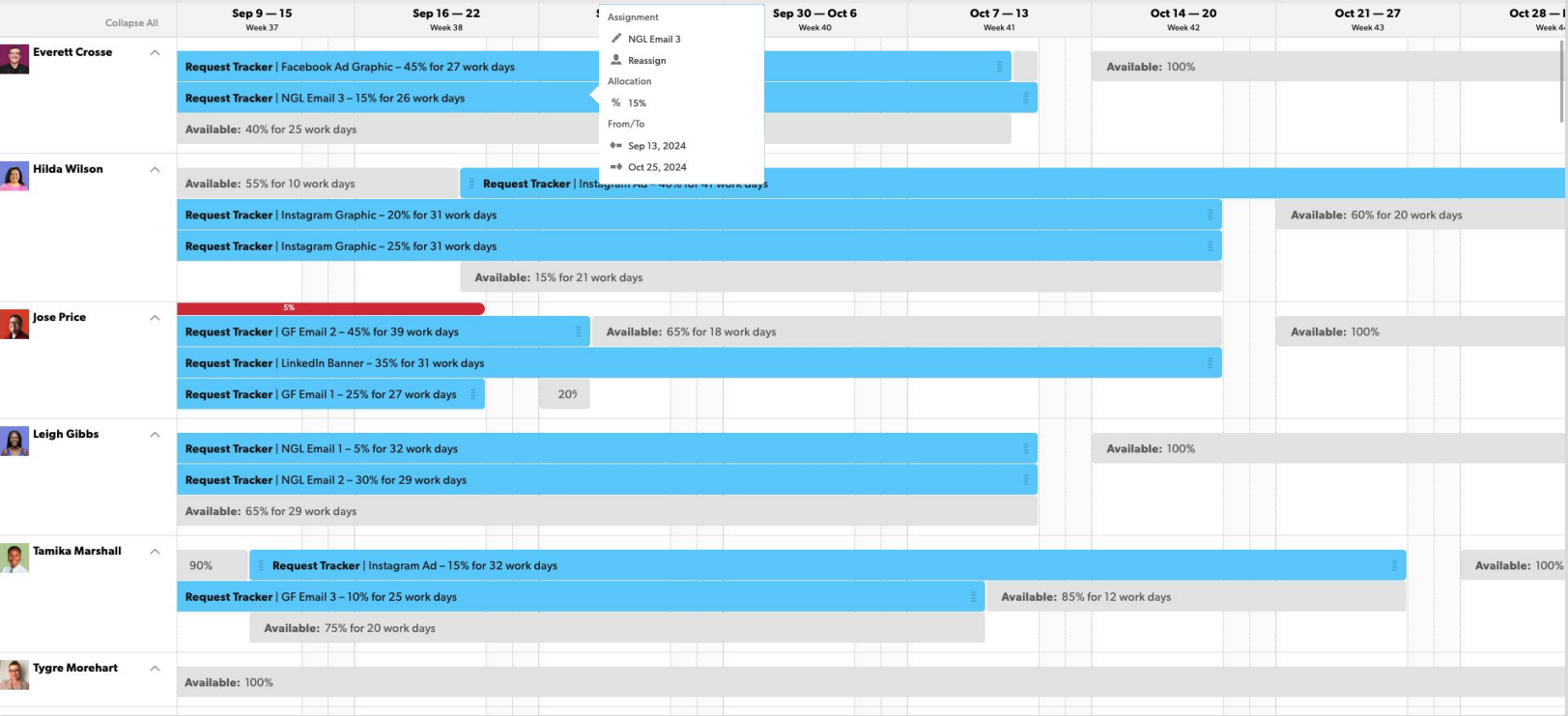
Updated about 19 hours ago by Via APL. [View Activity](#)

<b>Jose Price</b> Design, Designer	45%	70%	105%	8	35%
<b>Leigh Gibbs</b> Creative Services, CGI Artist	5'	35%			
<b>Everett Crosse</b> Design, Designer	60%				
<b>Tamika Marshall</b> Creative Services, Photographer	10'	25%	15%		
<b>Hilda Wilson</b> Production, Producer	45%	85%	40%		

← Back to Project Request Tracker

### Workload Schedule

← ↻ D W M T + Create assignment



6

## Scaling Collaboration

 smartsheet  
ENGAGE

My Requests

Filter

Request Number	Status	Goby / Final Image	Filename	Request Name	Description	Type	Date Submitted
REQ#1	Complete		IU_CPN654_SM001	Facebook Ad Graphic	modern library or collaborating on a project in a collaborative workspace. Text: "Innovate your future at Innovara University." Call to Action: "Learn More" or "Apply	Image	09/20/24
REQ#2	In Review		IU_CPN654_SM002	Instagram Graphic	Innovara alumni are making a difference. Call to Action: #InnovaraAlumni	Image	09/06/24
REQ#3	In Review		IU_CPN654_SM003	Instagram Ad	Discover a collaborative program (e.g., engineering, business, arts). Text: "Discover your passion at Innovara University." Call to Action: "Explore Programs" or	Video	09/20/24
REQ#4	With Creative/Designer		IU_CPN654_SM004	LinkedIn Banner	Experience the beauty of our campus, including our modern architecture and beautiful surroundings. Text: "Innovara University: Where Innovation Meets Education" Call to Action: "Visit Our Website" or "Join Our	Image	09/06/24
REQ#5	In Review		IU_CPN654_SM005	X Ad	Innovara University, including social events, clubs, and extracurricular activities. Text: "Experience the Innovara Difference" Call to Action: "Watch Video" or "Apply	Image	09/10/24
REQ#45	Complete		IU_CPN655_SM001	Facebook Ad Graphic	Innovara's School of Business offers top-tier programs in finance, marketing, management, and more. Gain the skills and knowledge you need to succeed in the business.	Image	09/04/24
REQ#44	Complete		IU_CPN655_SM002	Instagram Graphic	"Explore Research" Caption: Discover groundbreaking research being conducted by Innovara University faculty. Our faculty are at the forefront of their fields,	Image	09/06/24

Details

Data Attachments (0) Comments (0)

Status

In Review

Request Number


REQ#2

Filename

IU\_CPN654\_SM002

Goby / Final Image

pexels-yankrukov-8617993.jpg



Request Name

Instagram Graphic

Description

Theme: Alumni Success

Image: A photo of a successful alumnus in their professional field, with a quote about their experience at Innovara University.

Text: "Innovara alumni are making a difference."

Call to Action: #InnovaraAlumni #SuccessStory

Type

Image



The screenshot shows a Smartsheet report titled "My Proof Reviews" in a "Dynamic View" mode. The report is organized into columns based on task due dates: "Past Due (0)", "Next 5 Days (2)", "Next 10 Days (0)", and "Upcoming". The "Next 5 Days" column contains two items: "Instagram Ad" and "Faculty and Staff Directory". A filter overlay is active, showing a condition: "Pending App..." has any of 1 value selected, with "Current User" selected from a dropdown menu. The overlay includes "Cancel" and "OK" buttons. The top navigation bar shows the Smartsheet logo, the report name, and a "Share" button. The left sidebar contains navigation icons and a "Unategorized (0)" label.

**Scaling Success Together:** My Proof Reviews Report - only shows proofs that current user has been invited to review

app.smartsheet.com/dashboards/WhqR25QRWpcPFVxPPf9hfj53P68H89PCq7HFMr1

MBFCORP

File Edit View

My Requests - Dashboard

Share

INNOVARA

# INNOVARA: CREATIVE

## My Requests

### REQUESTS BY STATUS

Category	New Request	Not Started	In Progress	In Review	Approved	Complete
Image	0	0	1	2	0	0
Graphic	0	0	4	1	0	0
Powerpoint	0	0	2	1	0	0
Reports	0	0	0	0	1	0
Infographic	0	0	0	0	0	0
Blog Post	0	0	0	1	0	0
Social Media	0	0	4	2	0	0
Video/Animation	0	0	1	1	0	0

### METRICS

0  
New

14  
In Progress

5  
In Review

### SUBMIT A REQUEST

#### NEW SUBMISSIONS/REQUESTS

**Creative Services Request Form**

Submitted by \*

Select or enter value

#### Innovara U: My Requests

Filter

Request Number	Status	Goby / Final Image	Filename	Request Name
REQ#1	Complete		IU_CPN654_SM001	Facebook Ad Grap
REQ#2	In Review		IU_CPN654_SM002	Instagram Graphic
REQ#3	In Review		IU_CPN654_SM003	Instagram Ad

Scaling Success Together: Dashboard for collaborators

# 7

## Scaling Data

Control Center, DataTable, and DataMesh

 smartsheet  
ENGAGE

# Stock Photo Metadata



Connections **Data** Settings

Delete

Filter

<input type="checkbox"/>	Location	Video Filename	SCO ID	Asset Type	Source Information	Source ID	Description	Rightsholder	Rightsholder ID
<input type="checkbox"/>	shutterstock_1009648	ELSC25_NA_ENG_A08	A0860724	Video	shutterstock_1009648	1009648301	Trees in a forest	shutterstock	147802892
<input type="checkbox"/>	shutterstock_2324631	ELSC25_NA_ENG_A08	A0860728	Video	shutterstock_2324631	2324636	pumpkins	shutterstock	441454854
<input type="checkbox"/>	storyblocks_SBV-346	ELSC25_NA_ENG_A08	A0860732	Video	storyblocks_SBV-346	SBV-34659558	Blocks	storyblocks	478618665
<input type="checkbox"/>	storyblocks_SBV-346	ELSC25_NA_ENG_A08	A0860732	Video	storyblocks_SBV-346	SBV-346595568	Dogs and cats	storyblocks	327295893
<input type="checkbox"/>	storyblocks_SBV-346	ELSC25_NA_ENG_A08	A0860732	Video	storyblocks_SBV-346	SBV-346595604	children playing on playground	storyblocks	168395902
<input type="checkbox"/>	storyblocks_SBV-346	ELSC25_NA_ENG_A08	A0860732	Video	storyblocks_SBV-346	SBV-346595616	House with fall leaves	storyblocks	728530465
<input type="checkbox"/>	shutterstock_224113	ELSC25_NA_ENG_A08	A0860737	Video	shutterstock_224113	224113	Boy and girl doing science	shutterstock	224550937
<input type="checkbox"/>	shutterstock_1078172	ELSC25_NA_ENG_A08	A0860737	Video	shutterstock_1078172	1078172330	Holding baby animals	shutterstock	155983002

This is a preview (up to 100 records) of the data in the DataTable, not the entire dataset.

# Control Center




app.smartsheet.com/dashboards/jjpxr93vXr8X4vhxJgrw6328x4vh2RV783qp5x51

MBFCORP

File Edit View Campaign - Dashboard Share

## Innovara University: The Next Generation of Leaders

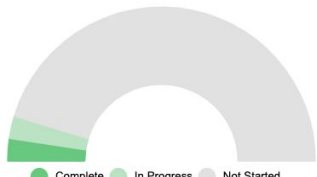
# Innovara Marketing



**Campaign ID**  
CPN-654

**Campaign Description**  
This campaign positions Innovara University as the place where future leaders are shaped. It focuses on leadership programs, entrepreneurship opportunities, and global partnerships that empower students to lead and create change. The campaign will highlight how the university's curriculum integrates hands-on experience, mentorship from industry leaders, and interdisciplinary learning. The goal is to attract ambitious students who aspire to make a significant impact on the world.

**Campaign Progress**



Complete In Progress Not Started

**Status**

**Target In Market Dates**  
**12/02/24**  
Start  
Finish

**Actual In Market Dates**  
Start  
Finish

**Shortcuts**

My Assigned Tasks


STEP 2 - Campaign - Info (from 1...


STEP 3 - Campaign - Plan


Campaign Portfolio

Campaign Calendar

**Key Contacts**

Campaign Lead  Shirley Huson

Design Lead  Jamal King

Copy Lead  Kai Senjima

app.smartsheet.com/sheets/R2X3W8G43m8fwfHhFhWGq7WCh29Rjr69mXcH5h1?timelineGroupBy=3008755394165&view=gantt

**MBFCORP** Video Production ☆ Share

File Automation Forms Connections Dynamic View

Gantt View Filter Arial 10 B I U C A

Task	Description	Assigned to	Comple...	Start Date	End Date	Pre...	Duration	Allocation %	Sep 8	Sep 15	Sep 22	Sep 29
<b>Studio Production</b>			<input checked="" type="checkbox"/>	09/13/24	10/23/24							
Pre-Production			<input checked="" type="checkbox"/>	09/13/24	09/20/24							
Develop script and storyboard	Writer, Artist	<input type="checkbox"/>	09/13/24	09/17/24		3d						
Gather equipment and props	Production Team	<input type="checkbox"/>	09/18/24	09/19/24		3	2d					
Schedule filming locations and crew	Production Manager	<input type="checkbox"/>	09/18/24	09/20/24		3	3d					
<b>Production</b>			<input checked="" type="checkbox"/>	09/23/24	09/25/24							
Filming	Director - Production	<input type="checkbox"/>	09/23/24	09/25/24		2	3d					
Audio Recording	Sound Engineer	<input type="checkbox"/>	09/23/24	09/24/24		2	2d					
<b>Post-Production</b>			<input checked="" type="checkbox"/>	09/26/24	10/23/24							
Video Editing	Video Editor - Product	<input type="checkbox"/>	09/26/24	10/02/24		6	5d					
Add music and sound effects	Sound designer - Prodi	<input type="checkbox"/>	10/03/24	10/07/24		10	3d					
Color correction and grading	Colorist	<input type="checkbox"/>	10/08/24	10/09/24		11	2d					
Review and approval	Stakeholders	<input type="checkbox"/>	10/10/24	10/23/24		12	10d					
<b>Animated Production</b>			<input checked="" type="checkbox"/>	09/13/24	11/07/24		40d					
Pre-Production			<input checked="" type="checkbox"/>	09/13/24	09/26/24		10d					
Develop script and storyboard	Writer, Artist	<input type="checkbox"/>	09/13/24	09/19/24		5d						
Create character designs	Character designer	<input type="checkbox"/>	09/20/24	09/26/24		17	5d					
Design backgrounds	Background artist	<input type="checkbox"/>	09/20/24	09/26/24		17	5d					
Create animation rigs	Animator	<input type="checkbox"/>	09/20/24	09/26/24		17	5d					
<b>Production</b>			<input checked="" type="checkbox"/>	09/27/24	10/10/24		10d					
Animate sequences	Animator	<input type="checkbox"/>	09/27/24	10/10/24		16	2w					
Record audio	Voice Actors, Sound Er	<input type="checkbox"/>	09/27/24	09/30/24		16	2d					
<b>Post-Production</b>			<input checked="" type="checkbox"/>	10/11/24	11/07/24		20d					
Video Editing	Video Editor - Product	<input type="checkbox"/>	10/11/24	10/17/24		21	5d					
Add music and sound effects	Sound designer - Prodi	<input type="checkbox"/>	10/18/24	10/22/24		25	3d					
Color correction and grading	Colorist	<input type="checkbox"/>	10/23/24	10/24/24		26	2d					
Review and approval	Stakeholders	<input type="checkbox"/>	10/25/24	11/07/24		27	10d					

# 8

Wrap up





# Learning Objectives

**Learn to set up an effective intake process and prioritize projects strategically.**

**Identify and mitigate common bottlenecks using Smartsheet tools.**

**Foster collaboration and create a structured environment that supports creativity.**

**Ensure brand consistency and compliance with approval workflows and proofing processes.**

# Next steps...

- Stop by the Smartsheet for Marketing & Creative Managers booth
- Check out the Experience Hub
- Other sessions to consider:
  - [Next] SEA1Intro - The Smartsheet product vision: A look ahead
  - [Next] SEA52Intro - Building Connected Content Workflows featuring File Library
  - [Wed] SEA21Intro - Maximize project efficiency with our new views
  - [Wed] SEA62Inter - Streamline product development processes for faster time to market
  - [Thur] SEA15Intro - How to get your marketing department to embrace Smartsheet

## Take the survey

We'd love to hear your thoughts on the session.

**Open this session in the mobile app, click "Survey,"  
and answer two questions — it's that easy!**

# Thank you.

 smartsheet

# ENGAGE

Register for upcoming User Groups



Continue to expand your Smartsheet skills and connections by attending a **User Group**.

### Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

# Share your experience at ENGAGE

by participating in the conversation on social media!  
Use **#SmartsheetENGAGE** and tag Smartsheet  
in your posts all week long.



@smartsheet



@smartsheetplatform



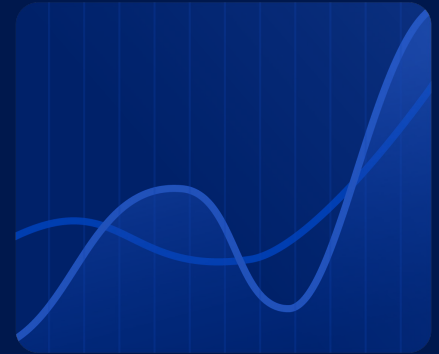
@smartsheet



@smartsheet



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