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Reviewing sensitive data in WorkApps

Celerion's Annual Comp Review Solution

v.07/16

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Session Speakers

Who are we anyways?



Chad Eiring

Manager, Technical Account
Management



Jennifer Whitney

Human Resource
Information System
Manager at Celerion

Agenda

1

Why did we need a more efficient solution to do the annual compensation review

2

What Smartsheet tools do we need?

3

Solution Demonstration

Learning Objectives

- **Understand the business benefits that Smartsheet can bring to Spreadsheet based processes**
- **Learn how to use Smartsheet to protect sensitive data using current user filters and Workapps or DynamicView**
- **Thinking through how to move a manual processes to Smartsheet**
- **Learn a novel use of DataMesh within a single sheet**

1

Celerion Overview and Business Case

Jennifer Whitney - Celerion

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Celerion is a premier provider in Clinical Research due to our commitment to excellence, innovative strategies and global capabilities.

We help Pharmaceutical and Biotech companies get their drugs swiftly thru the proof of concept and beyond so they can start making a difference in people's lives.



Celerion Structure

Our company is comprised of over 1300 employees across 7 countries.

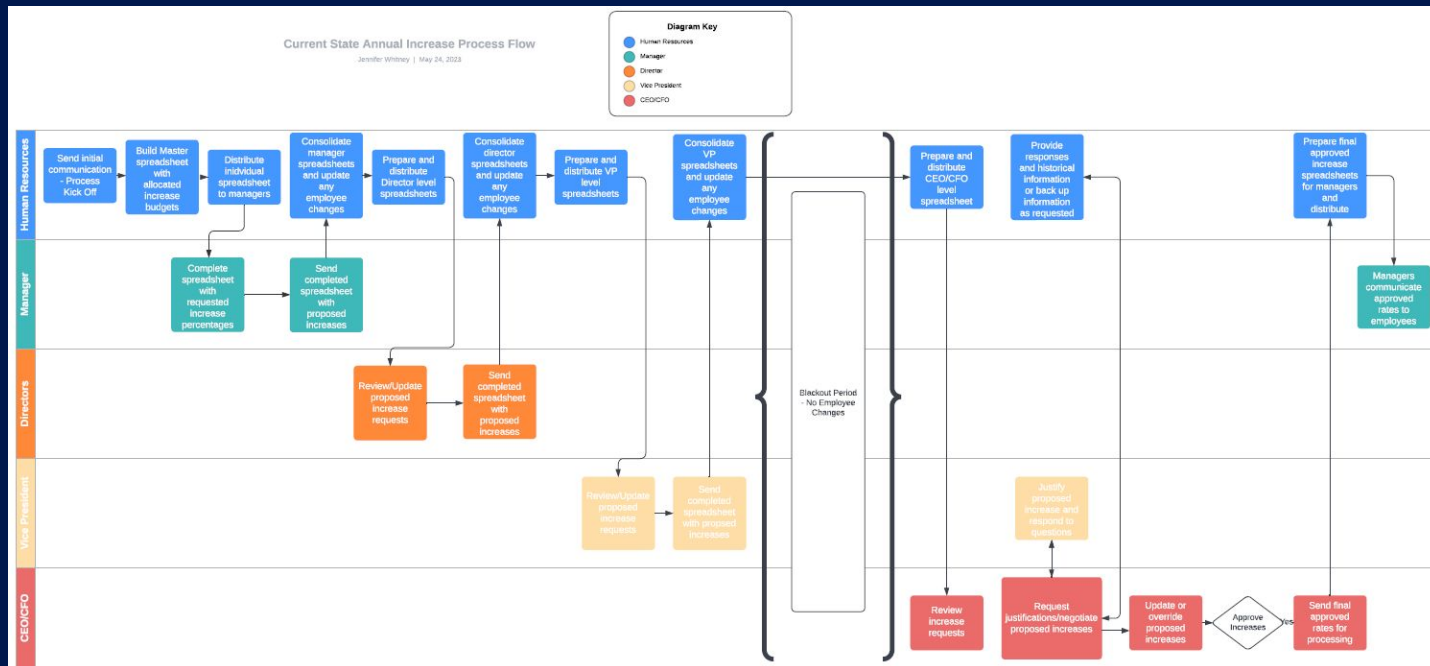
- Various employee types
 - FT, PT, Variable and Temporary
 - Paid hourly and salary
- Multiple currencies, but we report in US dollars



Previous Compensation Process

Our previous compensation process was facilitated by emailing Excel files back and forth.

The process worked but was very manual and time intensive.



Pain Points

Manual and Inefficient

600+ Excel spreadsheets which were manually password protected and emailed individually.

Employee information that changed during the process had to be manually updated .

- Managers, Departments, Employee Type, Pay Rates, etc.

Upper management lacked visibility to their team's budgets and details until they received it for approval.

- Not all levels of management had access to review their downline

Long process...10 week timeline due to the amount of rework and consolidation of passing spreadsheets back and forth.

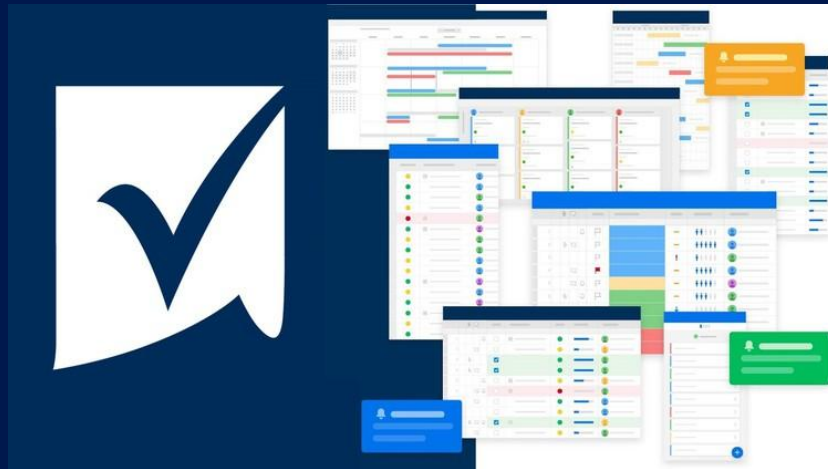
- Required an increase blackout where payroll increases could not be given until after annual increases were approved and processed.



Transition to Smartsheet

When the process was moved to Smartsheet using one source sheet, it provided a much more streamline and inclusive approach with better security and visibility to all lines of management.

It also allowed for customized reports and views to be presented in the work app depending on your management level in the organization.



Benefits of Using Smartsheet

Secure and efficient

Employee changes processed nightly from the HR system automatically with data shuttle and data mesh.

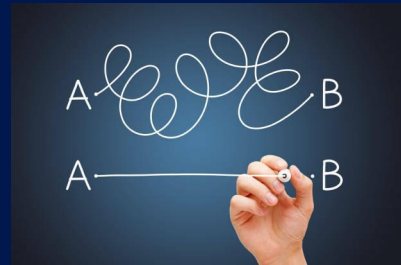
All managers have access to their full downline based on reports for their level of management

- Have access to review and approve their full downline

Managers have visibility to monitor how teams are tracking with completion and adherence to budgets throughout the process.

No longer need a blackout period for increases.

Ability to reduce compensation process timelines by 50%



2

What Smartsheet Tools Do we Need?

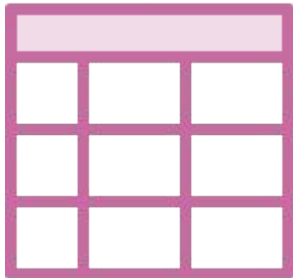
Chad Eiring - Smartsheet

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Smartsheet Tools

Workspace and Grids

- **We need a secure place to bring in employee data and store it along with compensation adjustments.**
 - Workspace with limited read permissions
- **We need to keep track of each reviewer's status and budget**
- **HR needs a place to manage the solution at a top level**
 - Grids to hold data, label rows with reporting hierarchy and use formulas for calculations



Smartsheet Tools

Reports

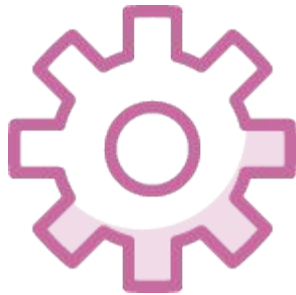
- **We need to only show rows for employees within the manager's hierarchy**
- **We only want to show the review row for the current employee**
 - Report with filter for current user



Smartsheet Tools

Datamesh and DataShuttle

- **Bring employee data into a grid**
- **Bring data from this grid to the master data sheet for the solution**
- **Optional: Build manager hierarchy and populate status sheet**
 - Data Shuttle and Data Mesh



Smartsheet Tools

Workapps

- **Only allow managers and above to access the solution**
- **Show managers their data without exposing the underlying sheets/reports**
 - **Workapps**
 - Dynamic Views



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Solution Demonstration

Chad Eiring



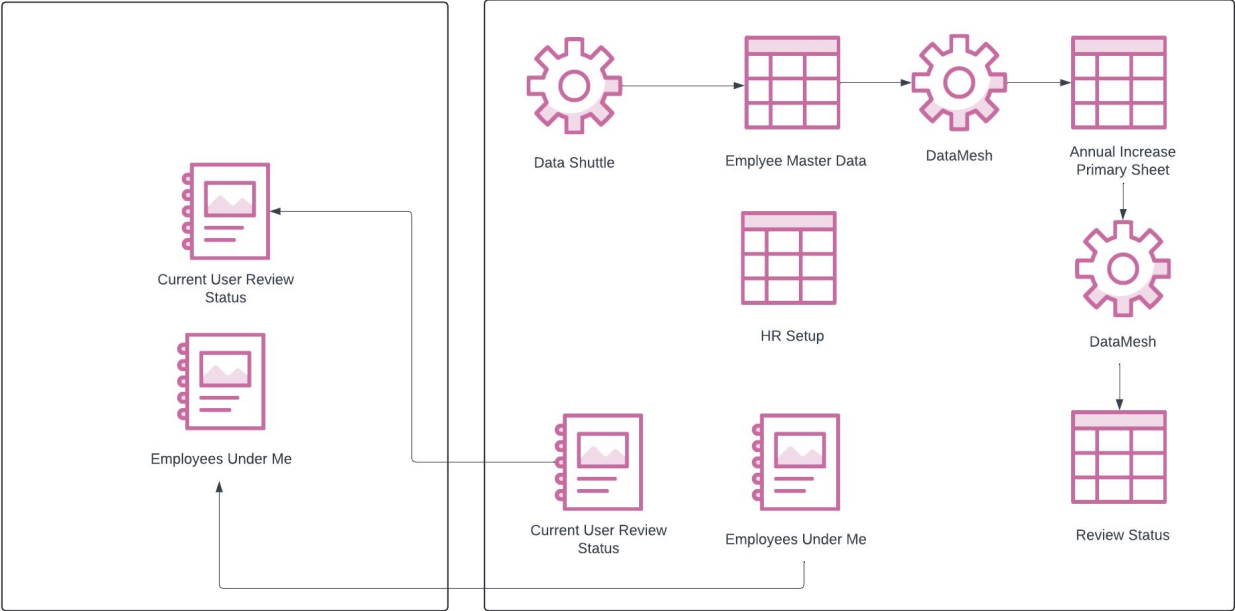
Solution Diagram



Solution Workapp



Main Workspace



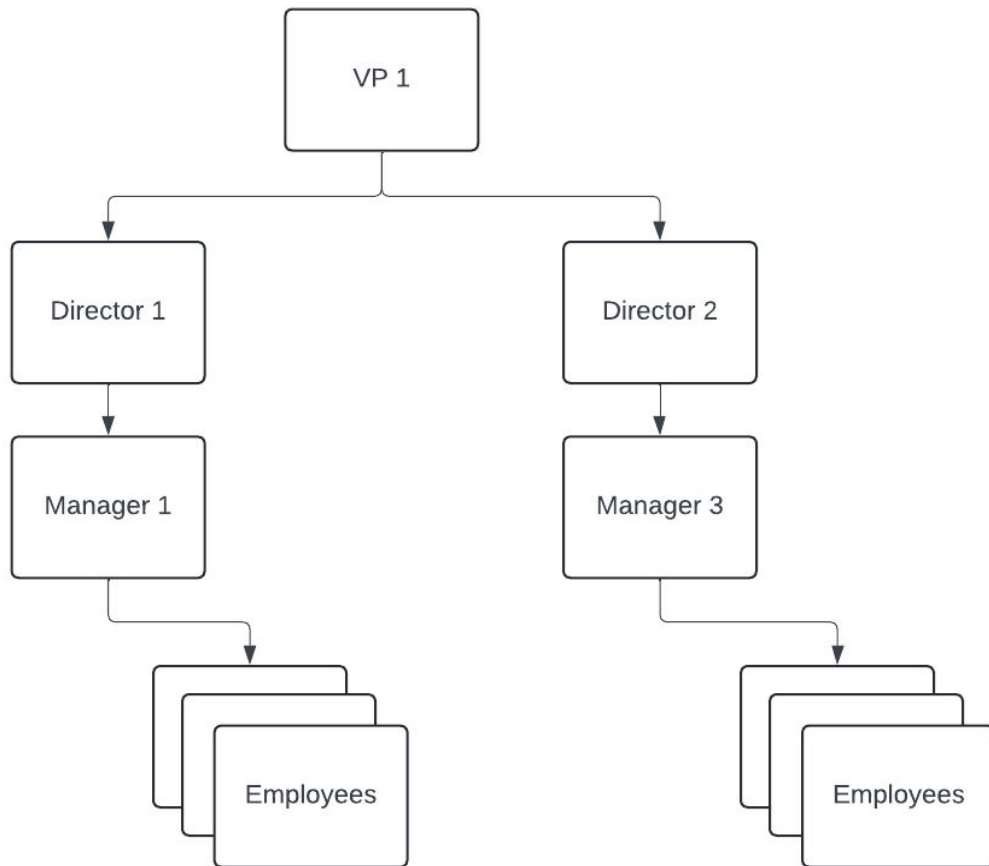
Employee Hierarchy

Simplified for this demo

We need to have each Manager review their direct reports

Each Director reviews their direct reports + their managers direct reports

VP needs to review their direct reports + every below





Solution Demonstration

- What do the users see?
- What does HR see?
- How did that all happen?

What does a Manager See

Current User Review Status - Used to monitor budget and approve reviews for the manager

The screenshot displays the WorkApps interface for HR Salary Review. On the left, there is a sidebar with a 'WorkApps' logo and a navigation menu containing 'HR Salary Review', 'Current User Review Status', and 'Employees Under Me'. The main content area is titled 'Current User Review Status' and features a table with the following columns: Name, Increase Budget \$, Difference \$, Proposed Increase \$, Number of Subordi..., and Review Complete. The table contains four rows, with the first row populated with data for a user named 'vp1@demo.mbcorp.test'.

	Name	Increase Budget \$	Difference \$	Proposed Increase \$	Number of Subordi...	Review Complete
1	vp1@demo.mbcorp.test	\$76,534.62	-\$6,865.24	\$83,399.86	4	<input type="checkbox"/>
2						
3						
4						

Reports are secured by Current User filters

No need for underlying sheet access when using a report in a WorkApp

The screenshot shows the configuration interface for a report titled "Employees Under Me". At the top, there is a "Share" button. Below it, a toolbar contains "Columns", "4 Filters", "1 Group", "3 Summaries", and "Sort". The main area displays a list of filter conditions for "Employee Location":

- L1: has any of
- L2: has any of
- L3: has any of
- L4: has any of

A dropdown menu is open for the first filter (L1), showing the following options:

- 1 Selected
- Blank
- Current User (checked)
- vp1@demo.mbfcorp.test (33)
- L1 (16)
- _Direct Reports (1)

At the bottom of the filter configuration, there are "Cancel" and "OK" buttons.

One Master Data Sheet

- Holds all employee info and collects the merit increases from manager
- Also holds the reporting structure based on direct managers

File Automation Forms Connections Dynamic View

Annual Increase Primary Sheet ☆

Grid View Filter Off Arial 10 B I U % A

Employee ID	Employee Type	Current Pay Rate	Annual Increase Budget %	Performance Rating	Proposed Increase %	Additional Increase Annualized Amount	Reason for Additional Increase (Provide details)	Changes to Propose Increase	Approved Increase Total	CFO Override (override amount if needed)	Total Increase Percentage (After CFO Override)	Proposed New Salary Annualized in USD	Current Salaries Annualized in USD	Annual Increase Budget Amount in USD	Proposed Increase Amount Annualized in USD	Diff in \$ Budget vs. Proposed	% Int
1	FT	\$120,819.00	3.00%	Superior/Highly Effective Performance	3.00%				3924.57		0.00%	\$124,443.57	\$120,819.00	\$3,624.57	\$3,624.57	\$0.00	
2	FT	\$79,010.00	3.00%	Partially Successful Performance/Needs Improvement	3.00%				2370.30		0.00%	\$81,380.30	\$79,010.00	\$2,370.30	\$2,370.30	\$0.00	
3	FT	\$75,697.00	3.00%	Superior/Highly Effective Performance	3.00%				2270.91		0.00%	\$77,967.91	\$75,697.00	\$2,270.91	\$2,270.91	\$0.00	
4	FT	\$51,112.00	3.00%		3.00%				1533.36		0.00%	\$52,645.36	\$51,112.00	\$1,533.36	\$1,533.36	\$0.00	
5	FT	\$81,646.00	3.00%		3.00%				2449.38		0.00%	\$84,095.38	\$81,646.00	\$2,449.38	\$2,449.38	\$0.00	
6	FT	\$91,689.00	3.00%	Superior/Highly Effective Performance	3.00%				2750.67		0.00%	\$94,439.67	\$91,689.00	\$2,750.67	\$2,750.67	\$0.00	
7	FT	\$52,952.00	3.00%	Fully Successful/Effective Performance	3.00%				1568.56		0.00%	\$54,540.56	\$52,952.00	\$1,588.56	\$1,588.56	\$0.00	

Review Status Sheet

One row per manager

Lock Approvals	Name	L4	L3	L2	L1	CFO	Review Complete	Date Review Completed	Increase Budget \$	Proposed Increase \$	Difference \$	All Subordin... Reviews Complete
	vp1@demo.mbfcorp.test	L1	L1	L1	L1	cfo@demo.mbfcorp	<input type="checkbox"/>		\$76,534.62	\$83,399.86	-\$6,865.24	<input type="checkbox"/>
	director1@demo.mbfcorp.test	L2	L2	L2	vp1@demo.mbfcorp.test	cfo@demo.mbfcorp	<input type="checkbox"/>		\$17,059.92	\$17,533.29	-\$473.37	<input type="checkbox"/>
	manager1@demo.mbfcorp.test	L3	L3	director1@demo.m	vp1@demo.mbfcorp.test	cfo@demo.mbfcorp	<input type="checkbox"/>		\$4,160.52	\$4,831.64	-\$671.12	<input type="checkbox"/>
	director2@demo.mbfcorp.test	L2	L2	L2	vp1@demo.mbfcorp.test	cfo@demo.mbfcorp	<input type="checkbox"/>	09/09/24	\$36,072.90	\$38,683.28	-\$2,610.38	<input type="checkbox"/>
	manager3@demo.mbfcorp.test	L3	L3	director2@demo.m	vp1@demo.mbfcorp.test	cfo@demo.mbfcorp	<input type="checkbox"/>	09/09/24	\$20,347.86	\$22,383.80	-\$2,035.94	<input type="checkbox"/>

HR Control Sheet

Overall control of the solution

Grid View Filter Arial 10 B I U S

Primary Column	Date	Checkbox	Percent
Date to Lock All Approvals	11/01/24		
Disable DataMesh		<input type="checkbox"/>	
Budgeted Increase			3%

Learning Objectives Recap

- Understand the business benefits that Smartsheet can bring to Spreadsheet based processes
 - **For Celerion, the overall process was done in 50% of the time, increased visibility to the status of the process, and huge reduction in admin time doing Excel and emails.**
- Thinking through how to move a manual processes to Smartsheet
 - **We evaluated what tools are available to use within the Smartsheet toolkit**
- Learn how to use Smartsheet to protect sensitive data using current user filters and Workapps or DynamicView
 - **Current User Filters on Reports shown on Workapps was used to protect sensitive data and only show needed data to manager**
- Learn a novel use of DataMesh within a single sheet
 - **DataMesh can be used instead of index-match to reduce formula complexity on a sheet**

Questions?



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

Next steps...

-

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.

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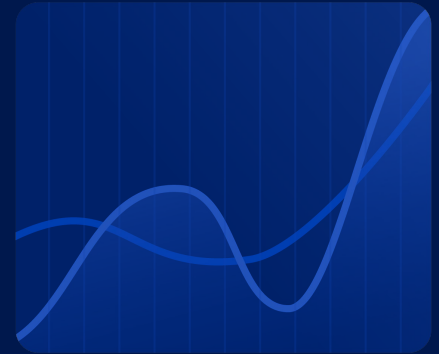
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