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# Enhance your solutions with Automations

Automated Workflows & Bridge

v.07/16

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# Speaker



**Grace Flader**

Senior Product Manager II,  
Automations

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# Automation

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# What does it mean to automate?

**Solution** → Built ✓

**Data** → In ✓

**Projects** → Setup ✓

**Team** → Shared ✓

**Job** → Done?

X

**5 Solutions** → 😊 ✓

**10 Solutions** → 😊 ✓

**100 Solutions** → 😬 ✓

**500 Solutions** → 😱 ✓

**1000 Solutions** → 😨 ✓

# Building the mental model

## What do I mean by “automation”?

Conducting a task automatically - all over Smartsheet ✓

- Import my data (or export!) - Data Shuttle ✓
- Bring data into a sheet from my source of truth - DataTable ✓
- Sync fields across Smartsheet - DataMesh ✓
- Calculate every value in this column - Formulas ✓

Doing things the way I do them - all over Smartsheet ✓

- Do this, but only when at certain times ✓
- Do that, but only on data where that applies ✓

Give me the ability to mimic my unique needs & processes and **turn decision-based manual tasks into background work** ✓





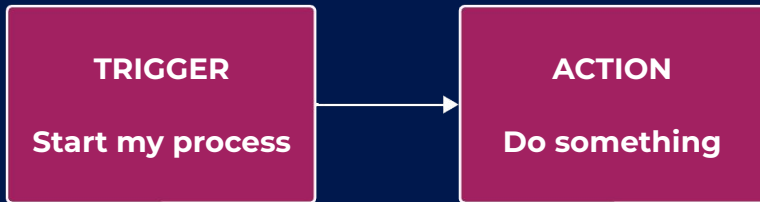
# What elements are consistent across automating?

## Triggers & Actions

**Triggers** - Start my process:

- TIME: On a specific date, a referenced date, or a cadence
- CHANGE: When a row or column changes

**Actions** - Do things for me (so I don't have to!) - Inform, Request, Do

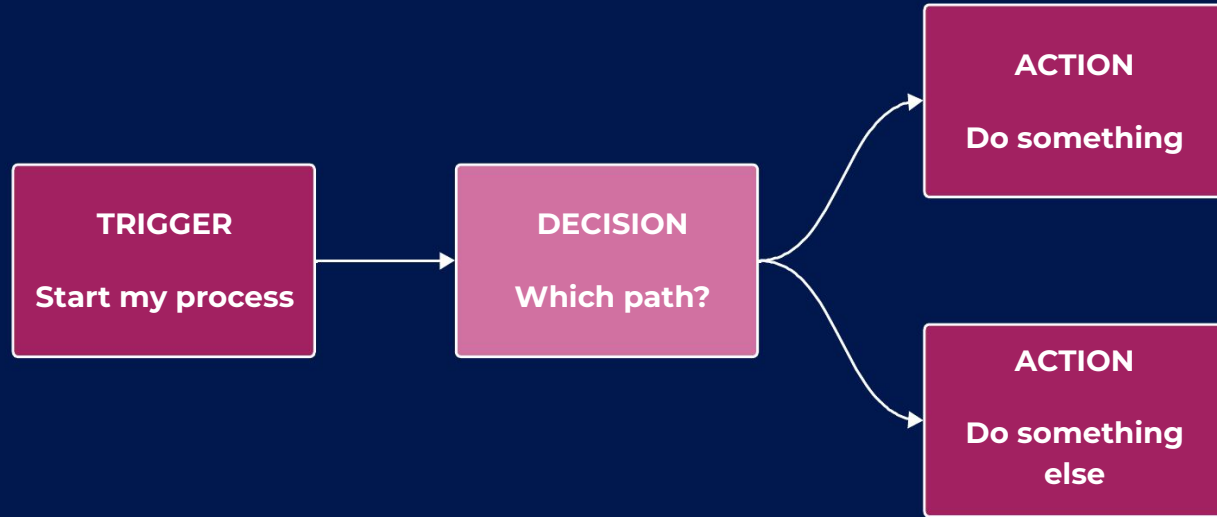


# What elements are consistent across automation?

## Triggers, Actions, Decisions

**Decisions** - the difference between *automatically* and *automation*.

- Alternate terms: Filters, conditions, junctions



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## Automated Workflows

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# What is Automated Workflows?

Sheet-level workflows help you to inform, collaborate, and automate simple changes - when, where, and how you need them to happen.

**Who can create workflows for themselves?** Everyone!

**Who can create workflows for everyone?** Admins & Owners

**Where:** in the sheet

**Which plans:** Pro, Business, Enterprise

**When:** use Automated Workflows when you need to automate a specific, simple task or set of tasks for your sheet



# What can you do?

## Automate your sheet-based collaboration & work tasks



### Inform about work

Keep people informed via email, Smartsheet Notification Center, Slack, or MS Teams



### Request work

Update rows and approve / decline work without accessing the sheet



### Do work

Take actions in your sheets when specific criteria are met



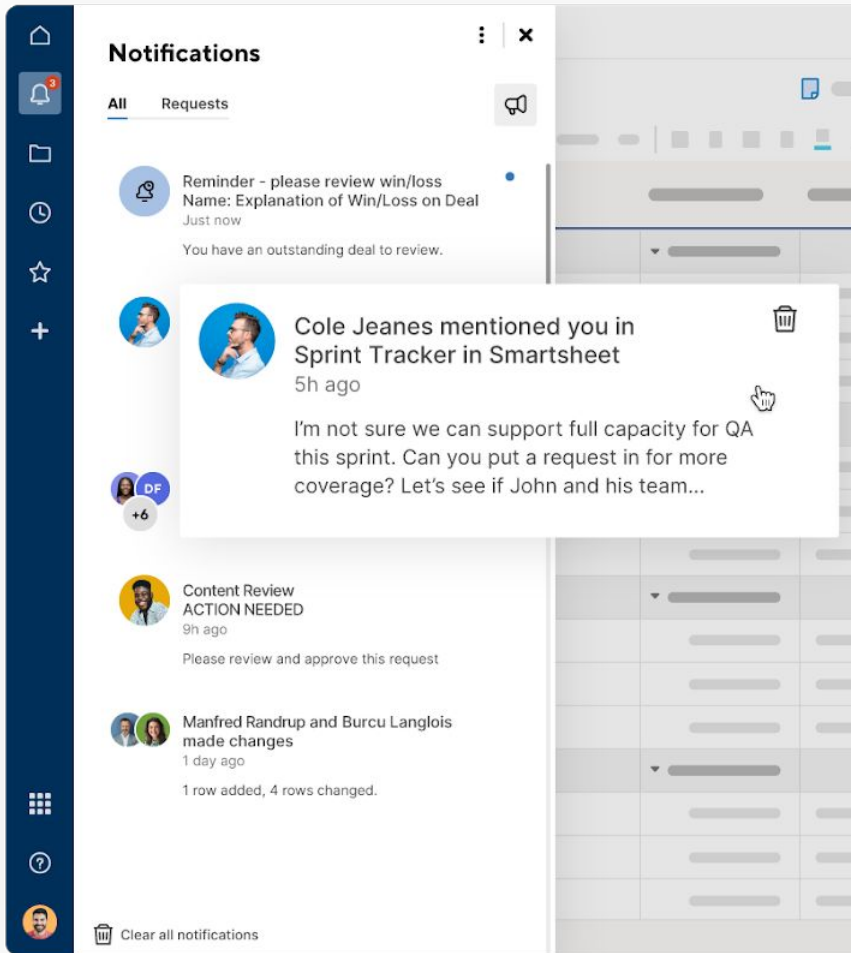


# Inform about work

Keep stakeholders & team members informed and engaged

There are several options to choose from:

- Email
- Notification Center
- Slack
- MS Teams



**Notifications**

All Requests

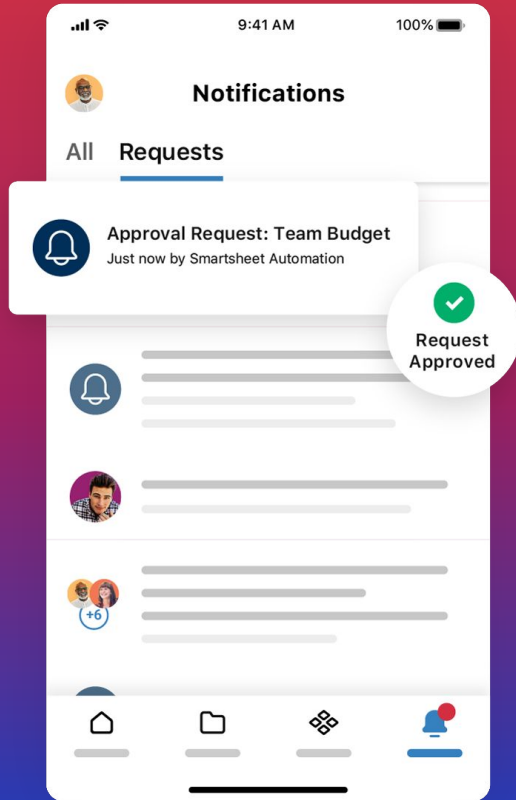
Reminder - please review win/loss  
Name: Explanation of Win/Loss on Deal  
Just now  
You have an outstanding deal to review.

Cole Jeanes mentioned you in Sprint Tracker in Smartsheet  
5h ago  
I'm not sure we can support full capacity for QA this sprint. Can you put a request in for more coverage? Let's see if John and his team...

Content Review  
**ACTION NEEDED**  
9h ago  
Please review and approve this request

Manfred Randrup and Burcu Langlois made changes  
1 day ago  
1 row added, 4 rows changed.

Clear all notifications



## Request Work

Enable stakeholders & team members to contribute without opening Smartsheet

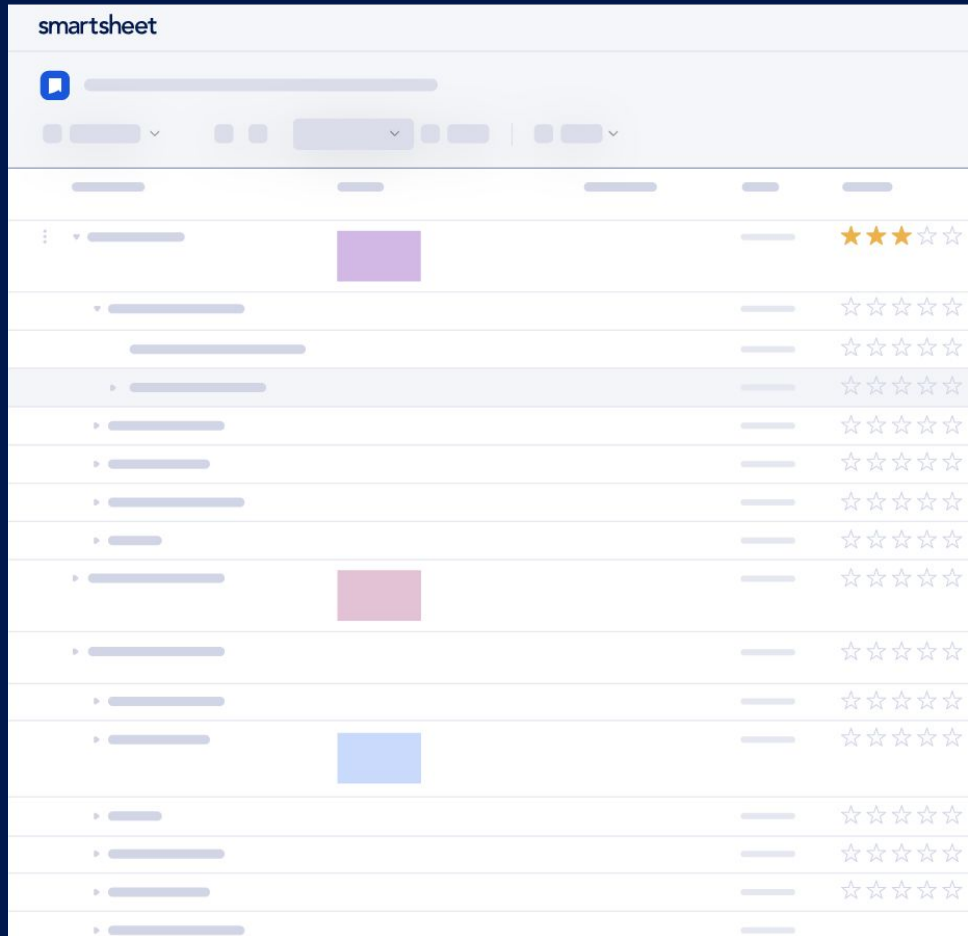
- Request an update
- Request an approval



## Do Work

Replace manual tasks in sheets & drive process efficiency

- Assign people
- Change cell data
- Record a date
- Generate documents
- Lock or unlock rows
- Copy or move rows to another sheet





# What to Know

## Automated Workflows

### How does it work & how do you use it?

Click Automations menu in your sheet

Templates or “from scratch” creation

Activate/Deactivate processes as needed

End recipients can unsubscribe from inform and request workflows

### Limits

Inform workflows will collect all events in 2 minutes and send them as a single notice to prevent overload.

Requests & workflows that do work will collect events over 2 minutes before starting the workflow.

150 workflows per sheet

Up to 30 actions per workflow

Up to 20 conditions (“decisions”) per workflow

### Best Practices

Combine similar workflows to increase efficiency in management and execution

Take care when creating workflows to ensure you don’t create an infinite loop

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**Bridge**

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# What is Bridge?

Bridge takes your automation a step further and beyond - set up decision-based workflows to manipulate data and chain your complex processes.

**Who:** Bridge Admins

**Where:** a unique URL




**Which plans:** Enterprise w/ Advance Gold or Advance Platinum

**When:** Use Bridge when you need to automate beyond the range of simple tasks and mimic complex decision-making or analysis

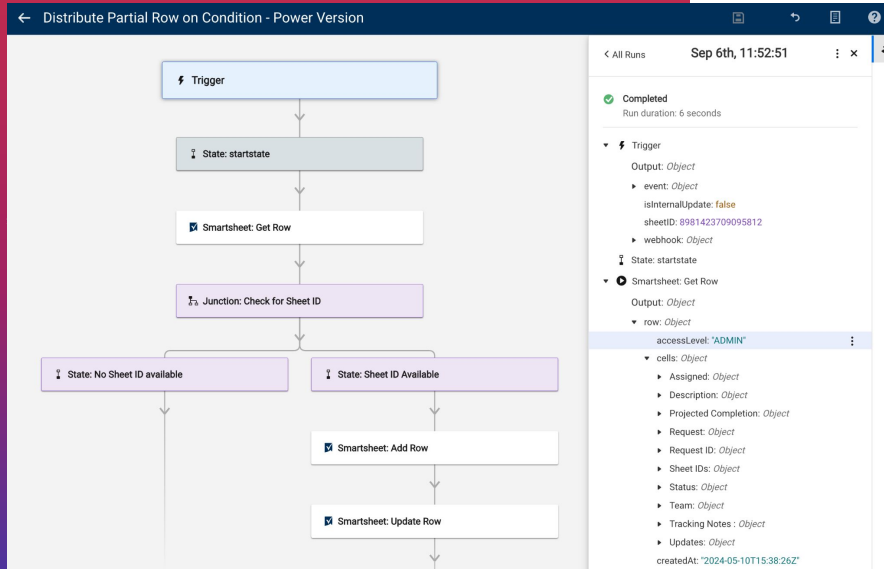


# What can you do?

## What makes Bridge different from Automated Workflows?

-  **Reference your data**  
Analyze your data and transform it with robust process workflows
-  **Manage processes centrally**  
Use a single Bridge workflow for similar projects
-  **Flexibility**  
Automate all across Smartsheet





# Reference Data

## Purpose & Functionality

Bridge lets you chain actions together. Each action can build on a previous action or trigger in the workflow. You can analyze data, transform it, or copy/move it.

Data references are what make this possible.

# Manage Processes Centrally

## Purpose & Functionality

Bridge workflows can “listen” to multiple sheets at once. You can add an additional trigger for each sheet that needs to use the same workflow. Some considerations:

- Sheets must have identical structure for the items you are analyzing or automating tasks on (i.e. a drop-down column named Status)
- Use data references in every field where the data must come from the sheet.
- The process you’re automating should be the same or very similar– you can use conditions to get around this.

### Extension - Smartsheet

[INFO](#)[CONNECT](#)

#### Triggers

##### Trigger 1

Trigger Name

Power Distribute

Sheet ID

8981423709095812

Sheet Name

Project Request Tracker

Event Type

When Column Values Are Changed

Column Name Or ID

6520942178207620

Column Name

Team

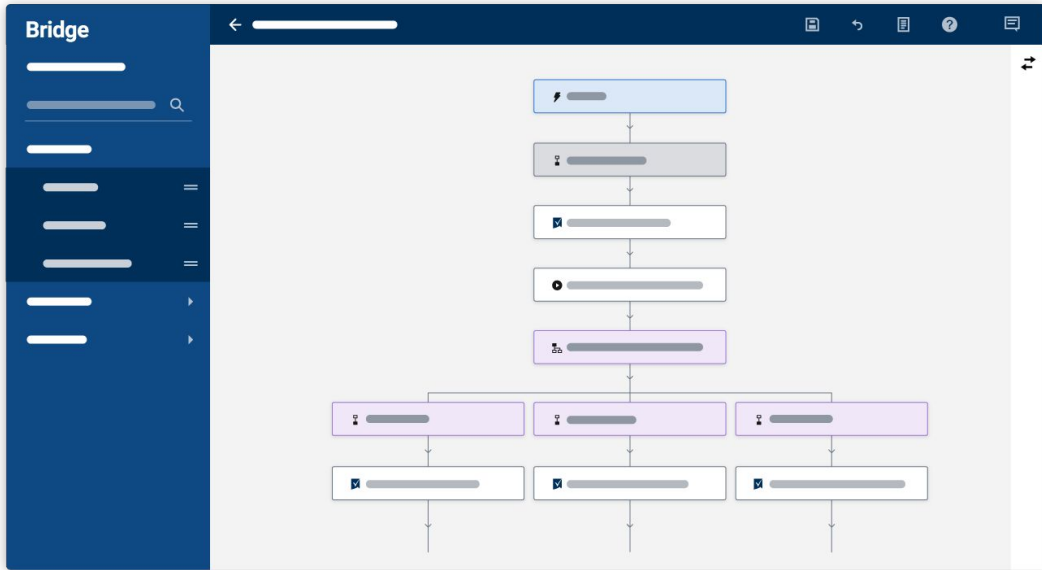
Workflow

Distribute Partial Row on Condition - Power Version

##### Trigger 2

##### Trigger 3

[Add to Triggers](#)[Disconnect](#)



# Flexibility & Complexity

## Purpose & Functionality

Bring automation out of your sheets, controlling important processes across Smartsheet - manage users, move sheets from workspace to workspace, or customize your Control Center solutions.

Set up complex sheet processes, from managing the hierarchy of rows in your sheets to creating and managing row data under intricate sets of conditions.

Break processes up into chunks and have workflows trigger other workflows to create complex process chains.

# What to Know

## Bridge

### How does it work & how do you use it?

If you're not the plan SysAdmin, you need to ask to be added to Bridge

Navigate to the Bridge URL in your email invitation

In Bridge, you build iteratively, one step or module at a time

It takes practice and repetition to learn

### Limits

Bound by the Public API limits  
- 300 actions per minute for Smartsheet, 500 for Resource Management

Workflows can't be renamed (yet) - so keep names general enough in case your process evolves

Call API feature only supports token-based APIs

### Best Practices

There are several workflow build examples in Help Center to get you started

Use data references whenever possible to keep your workflows dynamic and easy to scale across multiple sheets

It can be helpful to write up summaries of your workflows

Smartsheet Community!



## Automations

Define decisions and actions

Personalize, standardize, and expand

## Automated Workflows

Keep your team & stakeholders informed

Get updates from key collaborators

Reduce time spent on manual data tracking & changes

## Bridge

Analyze data in your sheets to power changes

Define automation across your solutions

Evolve sheet & solution structure

Manage users, groups, & admin actions

# In Summary...

- **Automation** enables you to define custom decisions and flows that **replace manual decisions and actions** that you and your teams take day to day.
- **Automated Workflows** accelerates your business efficiency by **informing, requesting, and conducting work** on behalf of you and your teams
- **Bridge** expands your automation capabilities across Smartsheet's suite of features.

# Automation options in Smartsheet

	Automate on a sheet	Automate sheet to sheet	Automate sheet admin tasks	Automate on users, groups, etc
Automated Workflows	✓	⚠	✗	✗
Bridge	✓	✓	✓	✓
APIs & Webhooks	✓	✓	✓	✓

# Unlock your Creativity & Expand your Impact

## Helpful & Related Sessions

### Collaborate and Power your Work

No to Low Code

#### Formulas: Building blocks for data analysis

Today, 2:30p

#### Enhance collaboration with Smartsheet

Tomorrow, 2:30p

#### Advanced power-user tips to up-level your Smartsheet experience

Tomorrow, 4p

#### Automate and scale your project portfolio with Smartsheet Control Center

Thurs, 9a

### Bridge, APIs, & Advanced Solution Setup

Low code to Coding

#### Rocket fuel for project teams: A deep dive into API integrations and automations with Smartsheet

Today, 2:30p

#### Advanced automations using Bridge by Smartsheet

Today, 4p

#### Supercharge Resource Management with the power of APIs

Tomorrow, 4p

#### The future of workflows: How Iron Mountain creates advanced solutions with API and Bridge

Thurs, 10:30a

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...

- Check out the related sessions
- Visit the Automations booth
- Get into the Community!

## 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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# Share your experience at ENGAGE

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



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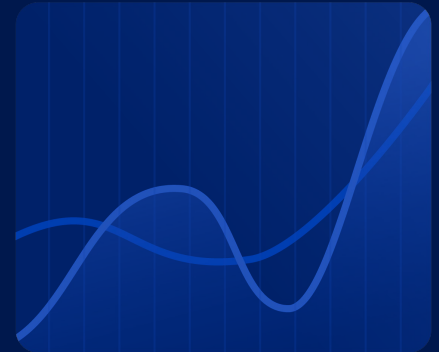
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