

 smartsheet

ENGAGE

Getting started with dashboards

SEA23

v.07/16

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Meet your speaker



Kendra Michaels
Senior Solutions Consultant



Where's the information you need?

The top challenge facing knowledge workers today is quickly finding the right answers and information to do their jobs





Make information easy to find

Dashboards help you organize, execute and present your work in one place

No more digging through old emails, or trying to remember which system that one file or report data was shared in.

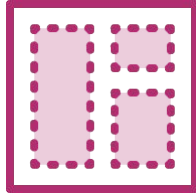
What you'll learn



What you'll learn



How and when to use dashboards



Different dashboard widgets and what they do



How to sketch and plug information into a dashboard

How and when to use dashboards





“There is something
almost quite
magical
about visual information.”

- **David McCandless**, Founder, Information is Beautiful

“I haven’t yet found a solution or use case that didn’t benefit from a dashboard. However, the content all depends on what needs to be said.”

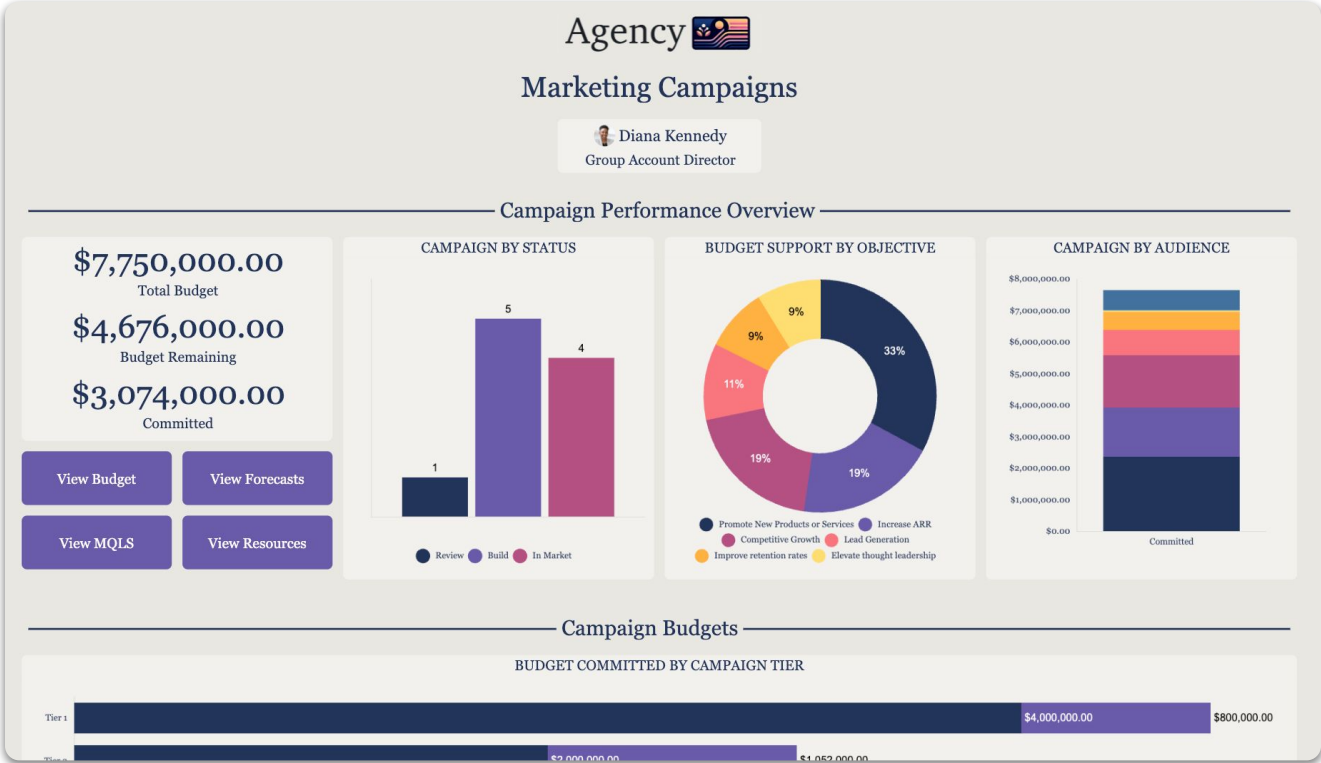


“I haven’t yet found a solution or use case that didn’t benefit from a dashboard. However, the content all depends on what needs to be said.”

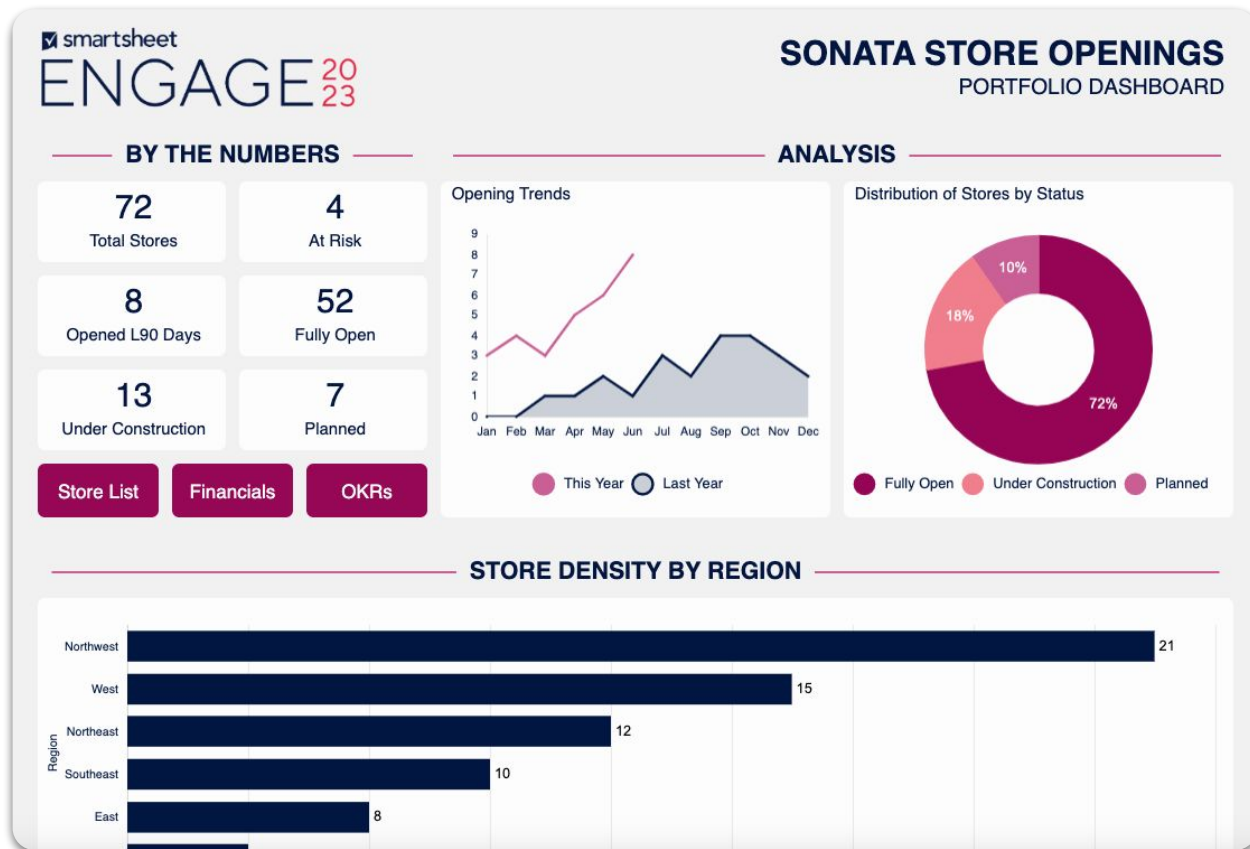
Kendra Michaels

Senior Solutions Consultant, PMP, general rockstar

Types of dashboards



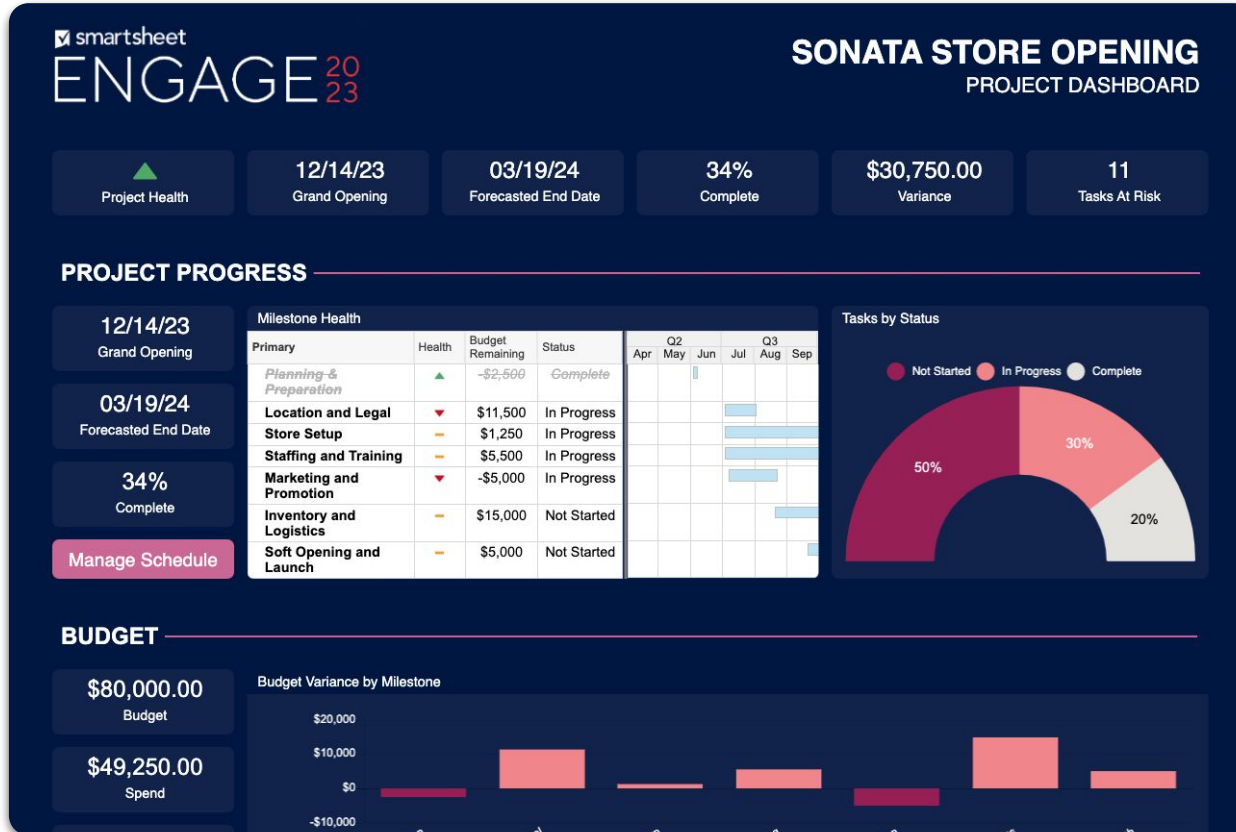
Types of dashboards



Types of dashboards



Types of dashboards



Widget types



Budget —————



Title

Labels, buttons, dividers

Add a title to your dashboard

05/12/25

Projected End

123

Metric

Key dates, KPIs, contacts

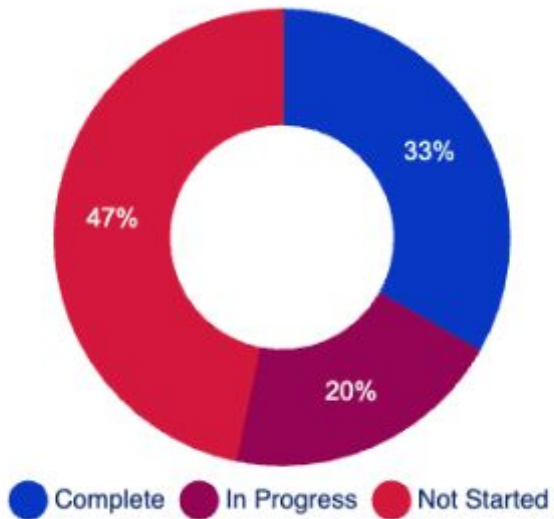
Display key cell values from a sheet

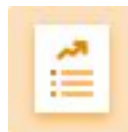


Chart

Data visualizations, progress, performance

Create a meaningful chart from a sheet or report





Report

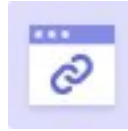
Project lists, high risk watchlist

Display a report on the dashboard

Item	Status	Priority	Issue #	Notes	Owner	Target Date
Total		Count				
		6				
Type		Count				
Risk		1				
Review Services Delivery Plan to date	In Progress	!	R-001	Link to sheet	Tamika Marshall	09/27/24
Type		Count				
Issue		2				
Establish client colors and logo for works	New	!	R-004	Background: default Tab	Olivia Carter	09/27/24
Enter contact information on Project Tea	New	-	R-002	Link to sheet	Kelly Smart	09/27/24
Type		Count				
Decision		1				
Set Report Out date	New	-	R-003		Jamal King	09/27/24
Type		Count				
Action		2				

Quick Links

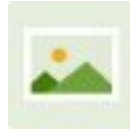
-  Project Plan
-  Portfolio Dashboard
-  Open RAID
-  Reference Documents



Shortcut

Reference documents, SOPs, external systems

Link to commonly accessed files, URLs, and Smartsheet items



Image

Progress or product photos, logos

Add a company logo or other image to your dashboard

New Task Submission

This is the beginning of a new Project

Task Name *

Task Explanation

Submitter Name *

Submitter Email *

Requested Date *

Type *

Consulting Services Onsite Training Event

[Submit](#)

Powered by  smartsheet

[Privacy Notice](#) | [Report Abuse](#)



Web Content

Resource Management, forms,
Tableau/PowerBI, embedded video

Add content to your dashboard from external sources



Welcome to the PMO Home Page! To submit a project, follow these steps:

1. Make sure you have all required supporting documents ready before you begin.
2. Fill out and submit [this form](#).
3. You can follow along with the status of your submission(s) in the report on the left.

Thank you for your submissions and participation!

Rich Text

Annotations, captions, instructions

Enter richly formatted text for updates or instructions

Important features



Background colours

Dashboard and widget control

This screenshot shows the 'Dashboard Settings' panel for a dashboard titled 'Landscaping'. The panel includes a search bar at the top, a 'Cancel' button, and a 'Save' button. The 'Background color' is set to #F2F8F7, and the 'Widget background' is set to #FFFFFF. A color palette is open, showing various color options and a 'Custom' section with a color picker.

Dashboard Settings

Background color: #F2F8F7

Widget background: #FFFFFF

This screenshot shows the 'Dashboard Settings' panel for a dashboard titled 'Project Portfolio'. The panel includes a search bar at the top, a 'Cancel' button, and a 'Save' button. The 'Background color' is set to #FFFFFF, and the 'Widget background' is set to #E2F2FE. A color palette is open, showing various color options and a 'Custom' section with a color picker.

Dashboard Settings

Background color: #FFFFFF

Widget background color: #E2F2FE

Dashboard Content:

- Status at a Glance:** A horizontal bar chart showing counts for different project statuses: In Review (1), Planned (1), In Progress (2), Complete (0), Missing Approval (0), and Declined (0).
- Priority Breakdown:** A vertical bar chart showing values for different priority levels: 1.2, 1.0, 1.0, and 1.0.

One-click apply full colour

Choose from nine new preset themes

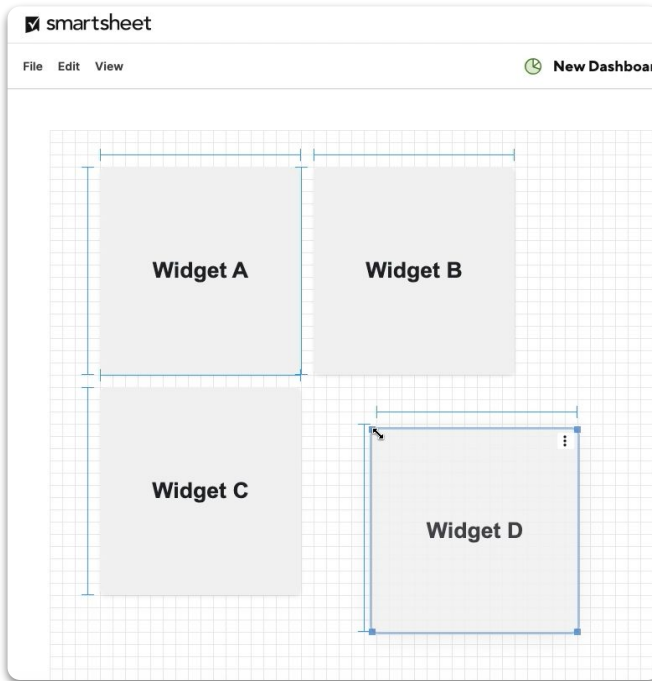
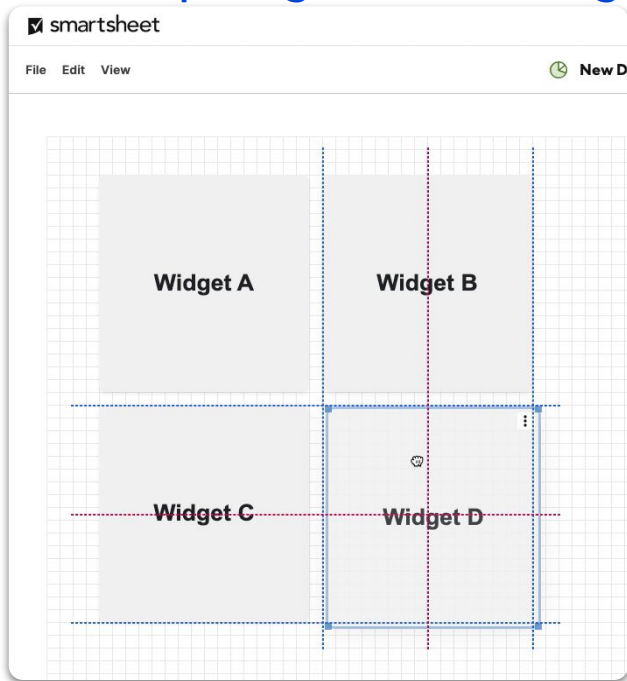
The image shows a Smartsheet dashboard interface with a 'Dashboard theme' selection overlay. The dashboard is titled 'TASK ANALYSIS' and features several data visualizations:

- Line Chart (Top Left):** Compares 'This Year' (green line) and 'Last Year' (blue line) performance across months from Apr to Dec.
- Bar Chart (Top Middle):** 'Completed YoY' showing monthly completion counts for 'This Year' (green bars) and 'Last Year' (blue bars).
- Pie Chart (Bottom Left):** Task status distribution: Planned Tasks (27%), Initiated Tasks (18%), Ongoing Tasks (27%), and Completed Tasks (27%).
- Horizontal Bar Chart (Bottom Middle):** 'Completed' tasks categorized by 'Completed Early' (green), 'Completed on Time' (blue), and 'Completed Late' (grey).
- Summary Cards (Bottom):** 8 Outstanding Tasks, 19 Average Task Time (days), 267% Tasks Assigned Increase YoY, 3 Completed Early, and 5 Completed on Time.

The 'Dashboard theme' overlay on the right lists nine themes: Standard, Classic, Rainbow, Sunny surf, Retro, Pastel, Starry night, Deep space, and Forest. It also includes options to change the 'Background color' (currently #223459) and 'Widget background color' (currently #131F39).

Widget alignment indicators

Ensure consistent spacing and even sizing



Multi-widget editing

Edit multiple widgets at the same time

The screenshot displays a Smartsheet dashboard with a dark theme. A 'Tasks' widget is visible at the top, showing a selection of '3 widgets selected'. The dashboard contains several chart widgets: a grouped bar chart titled 'ed YoY' comparing 'This Year' (green) and 'Last Year' (blue) data across months from Feb to Dec; a donut chart titled 'Priority' with segments of 11%, 11%, 22%, and 33%; and a 'Health' widget with a legend for 'Completed Early' (green), 'Completed on Time' (blue), and 'Completed Late' (red). A 'Widget Settings' panel is open on the right, showing options for 'Title', 'Title Styling' (font: Helvetica, size: 14), 'Legend', 'Widget Styling', and 'Widget Behavior'. The 'Show title' toggle is checked.

Widget Settings

3 chart widgets selected

Title Show title

Title Styling

Helvetica 14

B *I* U $\text{\textcircled{R}}$ A $\text{\textcircled{X}}$

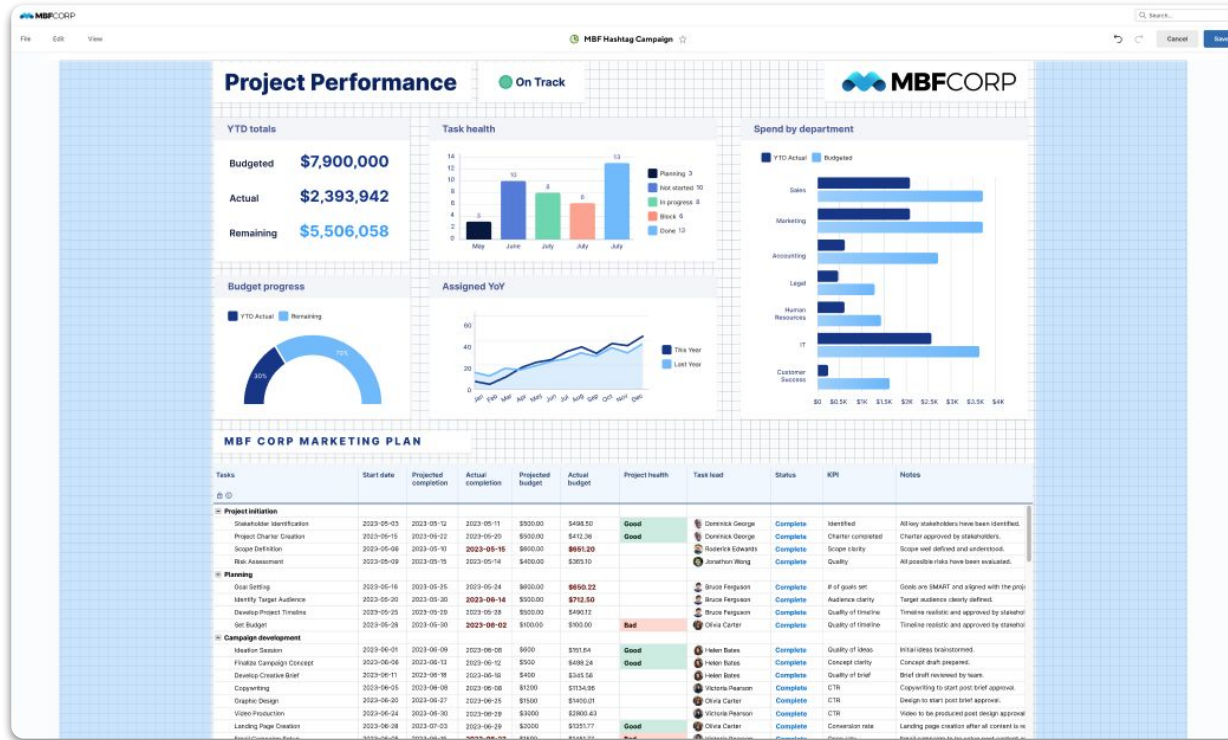
Legend >

Widget Styling >

Widget Behavior >

Wider canvas

Expand your dashboard



Sketching your dashboard and adding information



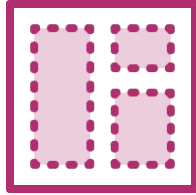


Let's try this on a
dashboard
in the app

What you learned



How and when to use dashboards



Different dashboard widgets and what they do



How to sketch and plug information into a dashboard

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...

- Start sketching your dashboard!
- Read the Smartsheet dashboard design series!
- Go to one of the other dashboards sessions at ENGAGE

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.



@smartsheet



@smartsheetplatform



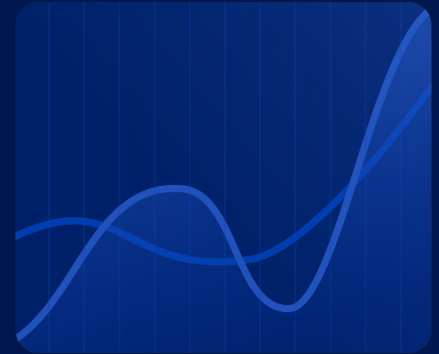
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