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



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v.07/16

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Your Session Guide



Rob Walzer

Principal Solutions Engineer,
Strategic Accounts



Today's Agenda

1

Introduction

2

Supercharge Form Entry

3

Sheet Structure Dynamics

4

Scalable Project
Configuration

5

Concluding Thoughts



How many of you have heard...

“You **can't** do that with the
Core App.”

“That **requires** Bridge.”

“You **need** Control Center
for that.”

Uplevel Your Core App Game

- Create **multiple rows** from a single form entry.
- Setup **dynamic sheet** formatting and easier reporting.
- Configure and rollup projects easily **at scale**.

2

Supercharge Form Entry

Create multiple rows from a single form entry

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“When my users submit a form, I need multiple rows created in my sheet depending on their submission values.”

Common Requests:

Multiple requests from a single form submission.

Automatically create repetitive task.

Smartsheet Core App Solution:

Copy Row & Move Row Automations with a Helper Sheet.

Knowledge Check

- Copy Row Automation
- Move Row Automation
- Column Formula
- Helper Column
- Helper Sheet

How It Works

Workflow

- User completes form entry including quantity value.
- New entries appear in “Intake Sheet”.
- Automation workflow **copies** row to “Tracker Sheet” based upon quantity selected.
- Tracker Sheet automatically numbers each with a unique id.

Requesting Department
Marketing ✕

Request Type
Social Media

| Job ID | Job # | Asset Label | Quantity Requested | Asset Title | As... Co... | Request Type |
|------------|----------|-------------------------------|--------------------|---------------------------|-------------|--------------|
| J#-14478.1 | J#-14478 | Blog Headlines for Social - 1 | 4 | Blog Headlines for Social | 1 | Social Media |
| J#-14478.2 | J#-14478 | Blog Headlines for Social - 2 | 4 | Blog Headlines for Social | 2 | Social Media |
| J#-14478.3 | J#-14478 | Blog Headlines for Social - 3 | 4 | Blog Headlines for Social | 3 | Social Media |
| J#-14478.4 | J#-14478 | Blog Headlines for Social - 4 | 4 | Blog Headlines for Social | 4 | Social Media |

Request Priority
 High Medium Low

Requested Due Date
10/01/2024

Send me a copy of my responses

Submit



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3

Sheet Structure Dynamics

Setup dynamic sheet formatting and easier reporting

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“When users move data within a sheet, they are breaking my formatting.”

“When I try to setup a report to only include tasks, I have trouble excluding other rows.”

Common Requests:

Maintain consistent formatting.

Simple collection of specific data into reports.

Smartsheet Core App Solution:

Column Formula with Ancestor Count.

Knowledge Check

- Conditional Formatting
- Column Formula
- Helper Column
- Children, Parents & Ancestors
- Ancestor Formula

How It Works

Setup

- Within a Sheet, add a Helper Column “Row Level”.
- Helper column contains column formula.
- Formula:

```
= COUNT(ANCESTORS([Primary Column]@row))
```
- Row Level column value identifies where in hierarchy the row appears.

| Row Level <i>f.</i> | Task Name |
|---|------------------|
| 0 | [-] Project Name |
| 1 | [-] Phase 1 |
| 2 | Task 1 |
| 2 | [-] Task 2 |
| 3 | Sub Task 1 |
| 3 | Sub Task 2 |
| 2 | Task 3 |
| 2 | Task 4 |
| 1 | [-] Phase 2 |
| <pre>=COUNT(ANCESTORS([Task Name]@row))</pre> | |
| 2 | Task 6 |
| 2 | Task 7 |

How It Works

Use

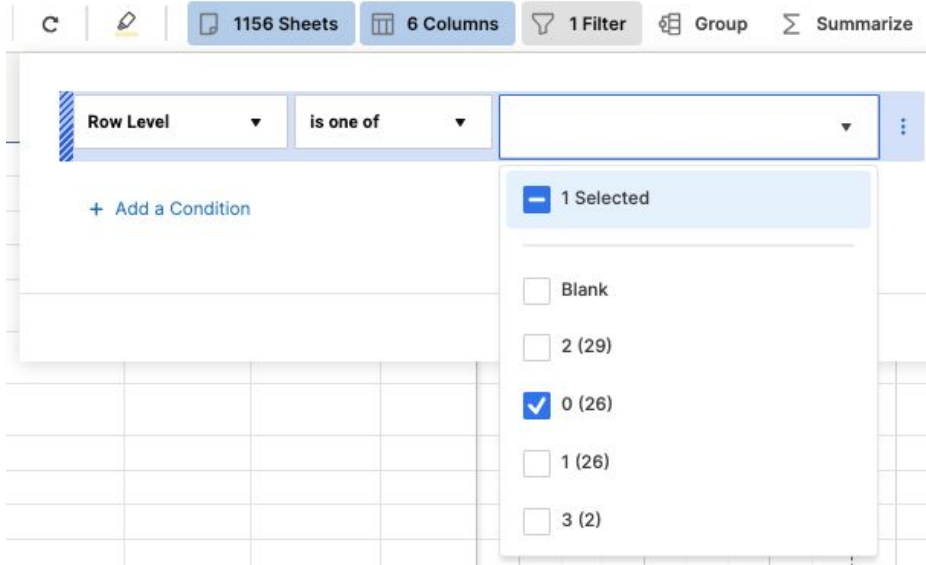
- Conditional formatting setup based upon Row Level value.
- As rows are added and moved in the hierarchy, formatting will automatically adjust and maintain defined formatting.

| Row Level | Task Name |
|-----------|---------------------|
| 0 | Project Name |
| 1 | Phase 1 |
| 2 | Task 1 |
| 2 | Task 2 |
| 3 | Sub Task 1 |
| 3 | Sub Task 2 |
| 2 | Task 3 |
| 2 | Task 4 |
| 1 | Phase 2 |
| 2 | Task 5 |
| 2 | Task 6 |
| 2 | Task 7 |
| 2 | Task 8 |

How It Works

Use

- Reporting filters can utilize Row Level value to pull correct rows.
- Example:
 - Show all projects and current status:
 - Filter report by “only Level 0”
 - Show all phases and tasks:
 - Filter report by “Not Level 0”
 - Show all tasks and sub-tasks:
 - Filter report by “only Level 2 & 3”



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4

Scalable Project Configuration

Configure and rollup projects easily at scale

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“When I create a new project, it takes a significant amount of time to set up.”

“When tracking many projects, it is time consuming to link all my project metric data into one place.”

Common Requests:

Automatically configure projects based upon intake data.

Easily link project data back into a single sheet.

Smartsheet Core App Solution:

Cross Sheet Formulas & Multiple Cell Linking.





Knowledge Check

- Cell Linking
- Cross Sheet Formulas
- INDEX/MATCH Formulas
- Sheet Summary

How It Works

Workflow

- Project Tracker Sheet:
 - Track, Review, Prioritize, and Approve new project submissions
 - Auto numbering column assigns unique Project ID

| Project Code | Project Name | Program | Project Description | Priority | Planned Start Date | Planned End Date | Proposed Budget | Project Lead | Approval |
|--------------|-----------------------------------|------------------------------|--|----------|--------------------|------------------|-----------------|---|----------|
| P-0224 | HQ Access Control Upgrade | Access Control | Upgrade access control systems at headquarters to a new RFID and biometric solution. | ! | 08/20/24 | 03/08/25 | \$30,000 |  Rob Walzer | Approved |
| P-0229 | Data Center Access Restrictions | Security Audits & Compliance | Implement stricter access restrictions at data centers, including multi-factor authentication. | ! | 08/20/24 | 11/08/24 | \$30,000 |  Rob Walzer | Approved |
| P-0034 | Remote Office Keycard Integration | Access Control | Integrate all remote office keycard systems into a centralized management platform. | - | 07/16/24 | 10/04/24 | \$15,000 |  Kirk Caskey | Approved |
| P-0035 | Employee Badge Revamp | Emergency Preparedness | Redesign and issue new employee badges with enhanced security features. | - | 09/24/24 | 05/12/27 | \$15,000 |  June Taylor | New |

How It Works

Workflow

- Project Template:
 - Sheet Summary contains values from intake sheet (blank to start)
 - Sheets and Dashboards configured to pull in Sheet Summary values
 - User enters Project ID into Sheet Summary value
 - All other Sheet Summary values use INDEX/MATCH formula to pull values directly from Tracker sheet and auto populate throughout new templates

The screenshot shows a 'Sheet Summary' form with the following fields:

- Project Code**: A text input field.
- Project Name** *fx*: A text input field with a formula icon.
- Program** *fx*: A text input field with a formula icon.
- Project Description** *fx*: A text input field with a formula icon.
- Priority** *fx*: A dropdown menu with a formula icon.
- Start Date** *fx*: A date input field with a formula icon and a calendar icon.
- Proposed Budget** *fx*: A text input field with a formula icon.
- Project Lead** *fx*: A dropdown menu with a formula icon.

At the bottom of the form is a button labeled '+ New Field'. The right sidebar contains various utility icons such as help, close, chat, link, print, export, refresh, undo, redo, and a star icon.

How It Works

Workflow

- Project Tracker Sheet:
 - Create “Link from Cell in Other Sheet”
 - Link entire top row from Project Plan to pull in all progress information

| Project Code | Project Name | Program | Project Description | Priority | Planned Start Date | Planned End Date | Proposed Budget | Project Lead | Approval | Owner | Sta |
|--------------|--|------------------------------|---|----------|--------------------|------------------|-----------------|-------------------|----------|-------|-----|
| P-0224 | HQ Access Control Upgrade | Access Control | Upgrade access control systems at headquarters to a new RFID and biometric solution. | ! | 08/20/24 | 03/08/25 | \$30,000 | Rob Walzer | Approved | | |
| P-0229 | Data Center Access Restrictions | Security Audits & Compliance | Implement stricter access restrictions at data centers, including multi-factor authentication. | ! | 08/20/24 | 11/08/24 | \$30,000 | Rob Walzer | Approved | | |
| P-0034 | Remote Office Keycard Integration | Access Control | Integrate all remote office keycard systems into a centralized management platform. | - | 07/16/24 | 10/04/24 | \$15,000 | Kirk Caskey | Approved | | |
| P-0035 | Employee Badge Revamp | Emergency Preparedness | Redesign and issue new employee badges with enhanced security features. | - | 09/24/24 | 05/12/27 | \$15,000 | June Taylor | New | | |
| P-0036 | Visitor Management System | Access Control | Deploy a visitor management system to track and control guest access across all locations. | ↓ | 10/09/24 | 08/05/25 | \$15,000 | Lori Garcia | New | | |
| P-0037 | Access Control for High-Security Areas | Access Control | Implement tiered access controls for high-security areas such as executive suites and server rooms. | ! | 08/25/24 | 11/03/24 | \$15,000 | Alexandra Mattson | Approved | | |
| P-0038 | Security Access Logs Review | Access Control | Regularly review and analyze access logs to identify unauthorized or unusual access attempts. | - | 09/29/24 | 03/18/27 | \$75,000 | Devon Gomez | New | | |
| P-0039 | Access Control Policy Update | Access Control | Update company-wide access control policies to align with industry best practices. | - | 07/01/24 | 06/26/25 | \$150,000 | Lori Garcia | Approved | | |
| P-0040 | Critical Asset Access Restrictions | Access Control | Restrict access to critical assets such as network infrastructure and core servers. | ↓ | 10/24/24 | 04/22/25 | \$45,000 | Lori Garcia | New | | |
| P-0041 | Contractor Access Management | Access Control | Implement a system for managing and monitoring contractor access to sensitive areas. | ! | 11/18/24 | 02/06/25 | \$10,000 | Kirk Caskey | Approved | | |
| P-0047 | Smart Building Integration | Access Control | Integrate access control systems with smart building technologies for improved efficiency. | ↓ | 07/01/24 | 12/28/24 | \$61,985 | Henry McNeal | Approved | | |
| P-0048 | Security Clearance Management | Access Control | Develop a system for managing employee security clearances based on job roles. | - | 07/21/24 | 07/26/27 | \$88,555 | Alexandra Mattson | Approved | | |
| P-0050 | CCTV Camera Network Expansion | Surveillance Systems | Expand the CCTV camera network to cover blind spots and improve coverage. | - | 07/01/24 | 11/09/24 | \$95,000 | Lori Garcia | Approved | | |
| P-0059 | AI-Powered Surveillance | Surveillance Systems | Deploy AI-powered surveillance for real-time threat detection and | ↓ | 07/28/24 | 02/08/25 | \$33,985 | Kirk Caskey | Approved | | |

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Concluding Thoughts

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Session Recap

- Use Copy & Move Row Automations with a Helper Sheet to automatically duplicate rows in a sheet.
- Utilize Ancestor Formula to automatically adjust formatting and make reporting easier.
- Implement Index/Match Formula to easily set up new projects.
- Structure the Sheet for easy linking of rollup reporting.

- Scan the QR Code to get the Template Set.
- Try These Power Tricks Within Your Own Solutions.



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...

- Other Sessions to Attend or Watch Later:
 - INDEX/MATCH/COLLECT
 - Row ID Management
 - Form Completion w/ Query Strings Thursday 9:00AM - 10:00AM
- Enjoy the After Party Now!

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

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Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.



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@smartsheetplatform



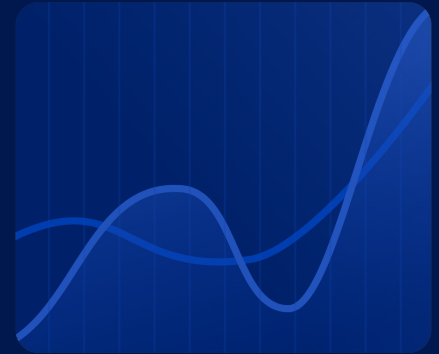
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