

Getting Started with Your First Solution

October 8, 2023

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v.07/16



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Today's speakers



Ramani Katari

Sr. Director, Product Management



Daniel Zarovy

Principal Product Manager



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Event Planning

1

Introduction & learning objectives

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Learning Objectives



1. Create

How to get started



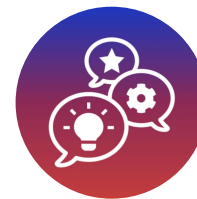
2. Connect

How it all works together



3. Customize

How to build it out



4. Collaborate

How to collaborate for success



“

We can all go off of 1 sheet and be able to, at the same time, message each other, add attachments and links,

all in one place.

Versus like a spreadsheet [in Excel], ... it's just so much easier through Smartsheet when there's that 'Assigned To' check...

”

User at a Manufacturing company

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2

The Basics: Building and collaborating on your first solution

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Ways to begin:

- Start from scratch
- Import
- Template

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Bring people and projects together with a workspace designed for seamless organization and collaboration.

Start with a popular template [View all templates >](#)

Simple Project Plan

Initiate, plan, and launch your project

Low complexity

Project with Work Breakdown Schedule (WBS)

Organize your projects with the popular WBS

Low complexity

Simple Project Portfolio

Intake, track, and manage dozens of projects

Medium complexity

Start from scratch

To add to an existing workspace, find and open it from [Home](#).

Import ▾

Workspace

WorkApp

Grid

Gantt

Board



Simple Request Intake & Tracking

+ Add

File library

Collections (0)

Workspace Items (4)

- Open Requests by Department
- Open Requests by Priority
- Request Management Dashboard
- Request Tracker

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File Edit View

Request Management Dashboard

Share

Request Management Dashboard

Simple Request Intake & Tracking

Shortcuts

- Intake Form
- Request Tracker

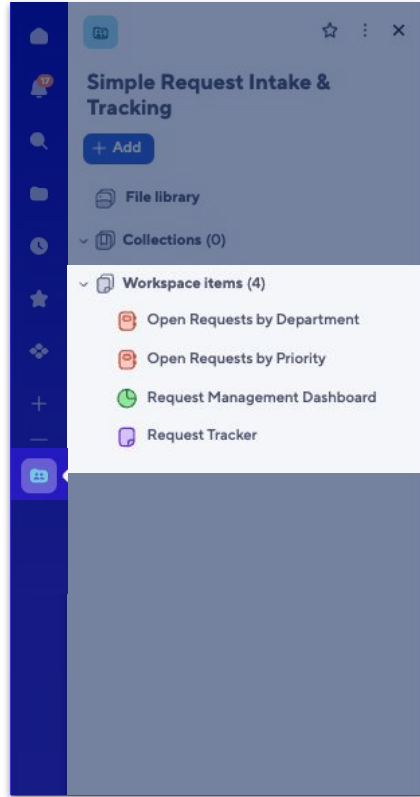
Open Requests by Department

Department	Count
Information Technology	2
Marketing	1
Product Development	1

Open Requests by Priority

Priority	Count	Percentage
High	1	25%
Low	1	25%
Medium	2	50%

Request	Description	Department	Assigned to	Start Date	End Date
Total		Count			
		4			
Department		Count			
Information Technology		2			
Status		Count			
In Progress		2			
New computer	MacBook Pro, 1TB	Information Technology	Kai Sanjima	01/27/24	02/06/24
Replacement badge	Misplaced and need to access the office next week.	Information Technology	Sheldon Greene	01/18/24	01/21/24
Department		Count			
Marketing		1			
Status		Count			
Blocked		1			
Add to SSO page	Need to add our DAM, Brandfolder.	Marketing	Ariv Perez	01/25/24	02/03/24



Workspace Items

Automation:
Request Status
Updates



Report:
Requests by
Department



Report:
Requests by
Priority



Tracker
Sheet



Form:
Collect Requests



Customize

Name (Optional)
Overdue Share filter

Show rows that match [all conditions](#)

Due Date	is in the past	<input type="text"/>	×
Status	is not one of	Completed	×
Select Field		<input type="text"/>	

Include parent rows

Filters

Sample Project Help & feedback

Board Filter Status

Status: Uncategorized (0)	Not Started (2)	In Progress (3)	Completed
	Lorem	Ipsum	Quia dolor
	Dolem qui	Sit amet	Dolem

Sample Timeline Help & feedback

Timeline Filter Team Quarters

124 2025 Q1 Q2 Q3

Product	Q1	Q2	Q3
Product Development	Product Development	Prototype Complete	
Market Research	Market Research		
Product Design	Product Design		
Prototype Development		Prototype Development	
Product Marketing			Marketing and Promo...

Campaign Start

Views



Work with colleagues



Inform stakeholders

@Mention in Comments	●	●
Assign task in "Contacts" column	●	●
Share & Assign Permissions	●	●
Request Updates / Reminders	●	●
Resource Management	●	●
Send Row	●	●
Shared Filters	●	●
Publish	●	●
Share a Dynamic View	●	●
Share a Proof	●	●

Common Use Case ●
Uncommon Use Case ●

3

**Next Level:
Using “Aha!” features**

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Organize Information

	Primary Column
1	Lorem
2	Ipsum
3	Dolem
4	Sit amet

Attachments

Primary Column	Column2
① Lorem	
Ipsum	
Dolem	
Sit amet	
Consectetur	

Indent Rows

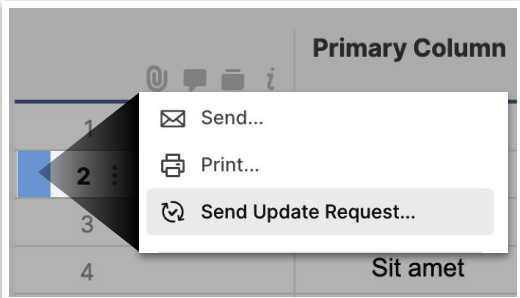
If Due Date is in the past then apply this format to the entire row **abcde**

Conditional Formatting

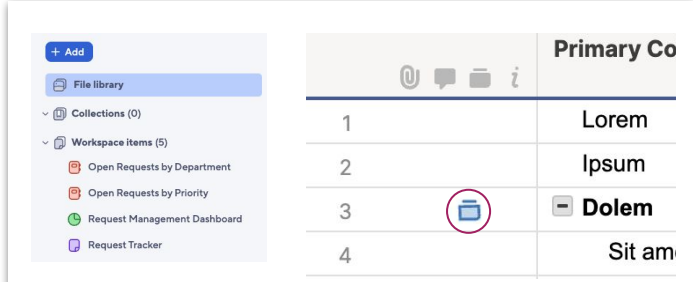
Request Tracker interface showing filters for Board and Department. The Board filter is set to 'Board' and the Department filter is set to 'Department'. Below the filters, there are two columns: Information Technology (2) and Marketing (1). The Information Technology column contains 'New computer' and 'Replacement badge'. The Marketing column contains 'Add to SSO page'.

Views / View By

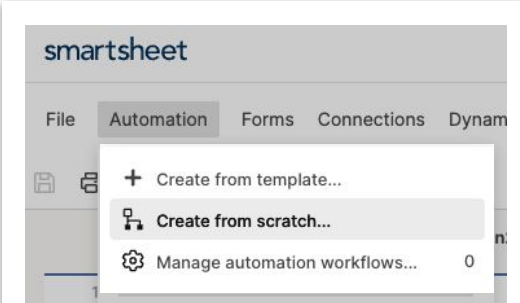
Work Asynchronously



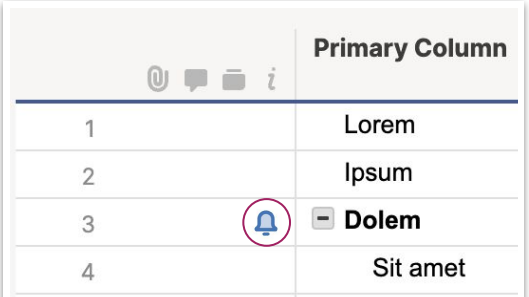
Request Updates



File Library & Proofs



Custom Automations



Reminders

Customize Columns

Total Cost
61.72

Hyperlink...

f_x Convert to Column Formula

Column Formula

Assigned to
KS Kai Senjima
A Aviv

Contacts

Effort
5d
11d

Duration

Categories
Thing 1 Group A
Thing 2 Group B


Multi-value
Dropdown

✓ ! ✕
● ▲ ●
★ ★ ☆ ☆ ☆
● ■ ◆ ◇

Symbols
Dropdown

Updated
09/12/24 3:09 PM
09/12/24 3:09 PM

Date/time Stamps

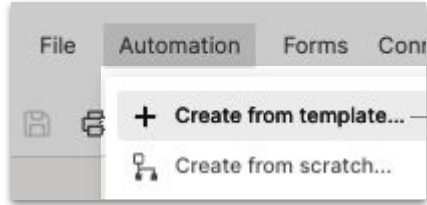


“ They fill out a form. It [automatically] goes to the director of their area. Once their director approves it, it [automatically] comes back to my boss. She looks at it and assigns it to a project manager. The project manager [automatically] gets alerted that they have a project.

**It's saved us so
much time** ”

A user in the Housing and Dining Services for a university

Deep Dive: Automate Update Requests



- Request *Weekly Update*
- Request Update when *criteria* are met
- Request *Approval* when criteria are met



Trigger

Trigger: When a date is reached ▾

Every week on Friday starting on 10/10/24 ▾

9:00 AM ▾



Conditions

▽ Conditions (1)

Where Status ▾ is one of ▾

In Progress Blocked

[+ Add another condition](#)



Message Content

Request an update

Send to contacts in a cell ▾

Assigned To

[Customize message](#)



Send from Smartsheet Automation

Message includes all fields









Deep Dive: Automatic Update Requests

Saved Automation Workflows


Filter by all ▾ Sort by name ▾ ↑

 **Project Gamma Weekly Update Request** 

Trigger: On 09/14/2024 at 10:00 AM
Actions: Request an update
Recipients: Contacts in 'Assigned To'

-  Deactivate
-  Run now...
-  Test now...
-  Edit
-  Duplicate
-  Unsubscribe
-  Delete
-  Properties...




 **smartsheet**

Please update my online sheet.

[Open request](#)

Details

Primary Column	Project 1
Assigned To	 Daniel Zarovy
Status	In Progress
Start Date	09/13/24
End Date	09/18/24
Duration	5d
At Risk	<input checked="" type="checkbox"/>

Deep Dive: File Library & Proofs

Workspace Level

+ Add


File library

Collections (0)

Workspace items (5)

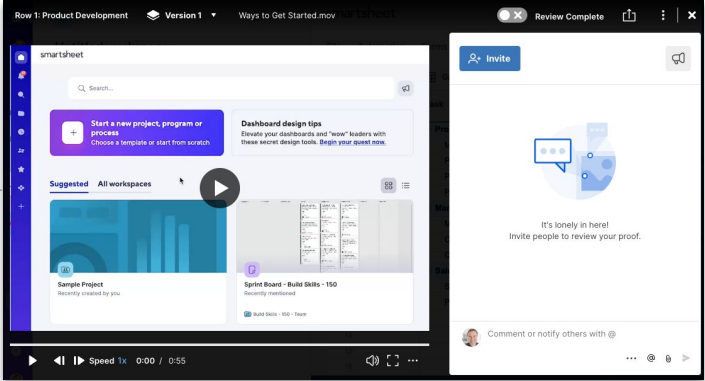
- Open Requests by Department
- Open Requests by Priority
- Request Management Dashboard
- Request Tracker

Row Level

	Primary Co
1	Lorem
2	Ipsum
3	 Dolem
4	Sit am

Drop your files here

Upload



Row 1: Product Development Version 1 Ways to Get Started.mov Review Complete

smartsheet

Start a new project, program or process

Dashboard design tips

Suggested All workspaces

Sample Project

Sprint Board - Build Skills - 150

Invite

It's lonely in here! Invite people to review your proof.

Comment or notify others with @

Deep Dive: Proofs

Row 1: Project 1 Version 1 Ways to Get Started.mov Review Complete

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Bring people and projects together with a workspace designed for seamless organization and collaboration.

Start with a popular template View all templates >

Simple Project Plan
Initiate, plan, and launch your project
Low complexity

Project with Work Breakdown Schedule (WBS)
Organize your projects with the popular WBS
Low complexity

Simple Project Portfolio
Intake, track, and manage dozens of projects
Medium complexity

Start from scratch
To add to an existing workspace, find and open it from [Home](#).

Import Workspace WorkApp

Grid Gantt Board

Invite

Daniel Zarovy 1 0:12

We should start by demonstrating the easiest way to get started, then go to the ones that require more effort. So, we should do Import, then templates, then from scratch

1 minute ago

Reply

Comment or notify others with @

Speed 1x 0:12 / 0:55

Deep Dive: Proofs

Row 1: Project 1 Version 1 Ways to Get Started.mov Review Complete

The screenshot shows the Smartsheet interface. At the top, it says "smartsheet" and "Bring people and projects together with a workspace designed for seamless organization and collaboration." Below this is a section "Start with a popular template" with three options: "Simple Project Plan", "Project with Work Breakdown Schedule (WBS)", and "Simple Project Portfolio". A red dashed line points to a "Start from scratch" button. A video player overlay is positioned on the right side of the screen, showing a comment by Daniel Zarovy. The video player has a progress bar at the bottom showing "Speed 1x 0:12 / 0:55".

Start from **1** scratch

To add to an existing workspace, find and open it from Home.

Import Workspace WorkApp

Grid Gantt Board

Invite

Daniel Zarovy 1 0:12

We should start by demonstrating the easiest way to get started, then go to the ones that require more effort. So, we should do Import, then templates, then from scratch

1 minute ago

Reply

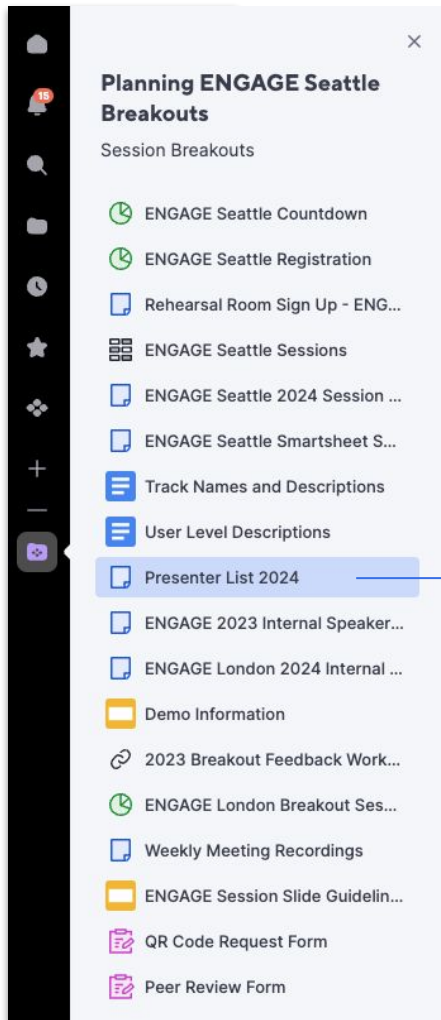
Comment or notify others with @

Speed 1x 0:12 / 0:55

4

Putting it all together: Event Planning

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Who are the presenters?

What session(s) are they presenting?

What information can we share about them?

Global Create



Create Grid

The screenshot shows the Smartsheet home dashboard. At the top left is the 'smartsheet' logo. Below it is a navigation sidebar with icons for home, notifications, chat, folders, calendar, views, favorites, and a plus sign. The main content area features a header with the text 'Let's start a new project, program, or process' and a sub-header 'Bring people and projects together with a workspace designed for seamless organization and collaboration.' Below this is a section 'Start with a popular template' with a link 'View all templates >'. There are three template cards: 'Simple Project Plan' (low complexity), 'Project with Work Breakdown Schedule (WBS)' (low complexity), and 'Simple Project Portfolio' (medium complexity). A 'Start from scratch' section follows, with a link to 'Home' and a grid of options: 'Import', 'Workspace', 'WorkApp', 'Grid' (highlighted), 'Gantt', and 'Board'.

smartsheet

Let's start a new project, program, or process

Bring people and projects together with a workspace designed for seamless organization and collaboration.

Start with a popular template [View all templates >](#)

Simple Project Plan
Initiate, plan, and launch your project
Low complexity

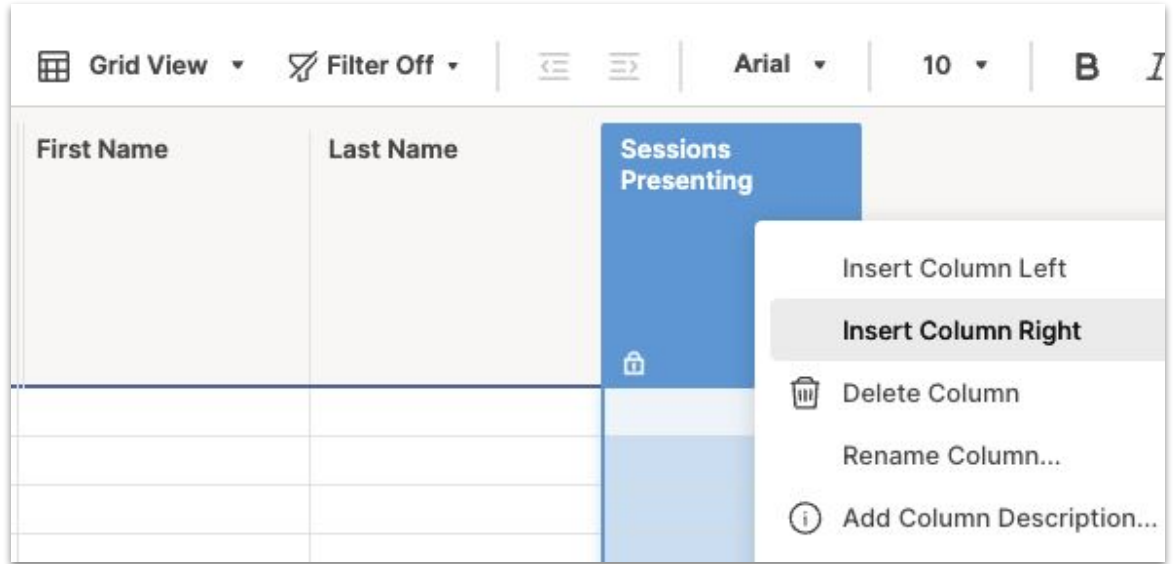
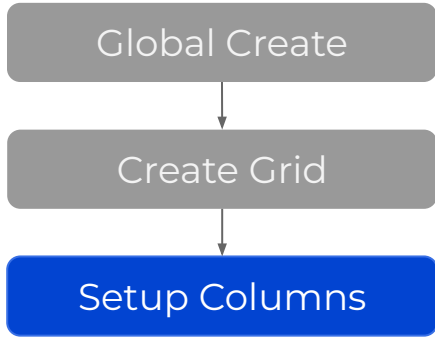
Project with Work Breakdown Schedule (WBS)
Organize your projects with the popular WBS
Low complexity

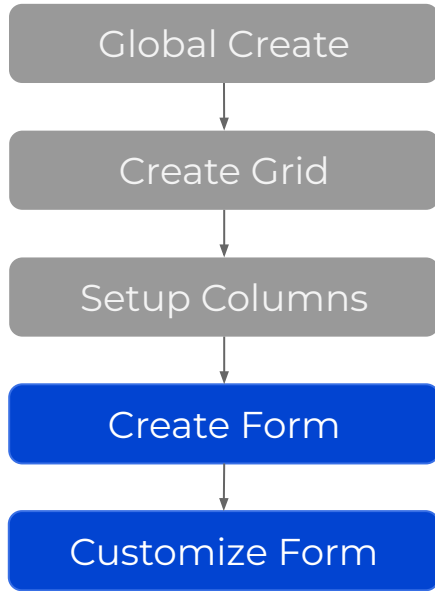
Simple Project Portfolio
Intake, track, and manage dozens of projects
Medium complexity

Start from scratch
To add to an existing workspace, find and open it from [Home](#).

Import ▾ Workspace WorkApp

Grid Gantt Board





Form Settings

Active Open Form Share Form Save

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Presenter List 2024

Field Settings

Presenter Email
Contact List

Field Logic

Label

Help Text

Required Hidden

Validation
Email No Validation

Default Value

First Name *

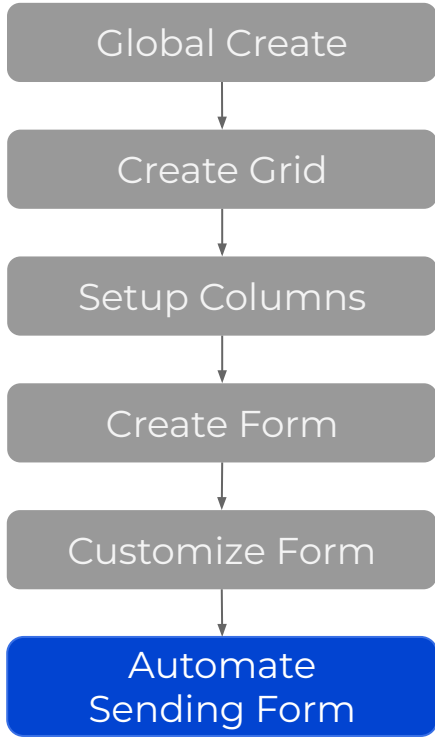
Last Name *

Sessions Presenting *

Speaker Title *


Speaker Bio (900 characters max) *

Presenter Email *



Saved Automation Workflows

Filter by all ▾ Sort by name ▾ ↑






 **Engage Speaker Bios Request**


Trigger: On 09/14/2024 at 11:00 AM

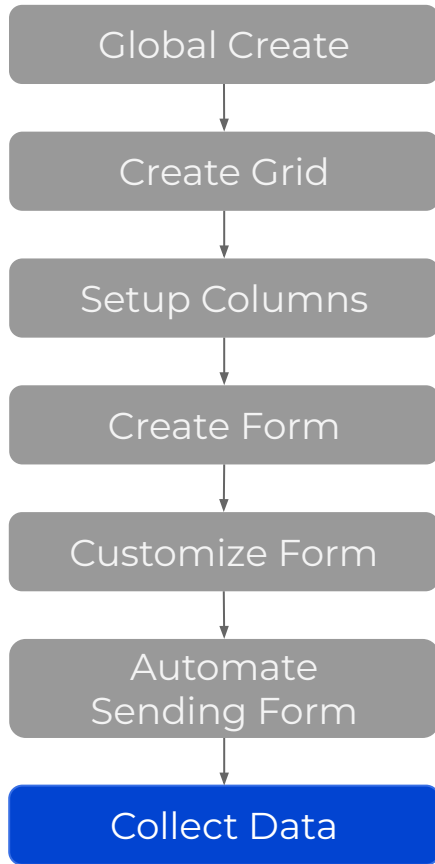
Actions: Request an update

Recipients: Daniel Zarovy

Last modified by Daniel Zarovy on Sep 13, 2024, 10:22 AM

-  **Activate**
-  **Edit**
-  **Duplicate**
-  **Unsubscribe**
-  **Delete**

-  **Properties...**




Planning ENGAGE Seattle Breakouts

Session Breakouts

- ENGAGE Seattle Countdown
- ENGAGE Seattle Registration
- Rehearsal Room Sign Up - ENG...
- ENGAGE Seattle Sessions
- ENGAGE Seattle 2024 Session ...
- ENGAGE Seattle Smartsheet S...
- Track Names and Descriptions
- User Level Descriptions
- Presenter List 2024**
- ENGAGE 2023 Internal Speaker...
- ENGAGE London 2024 Internal ...

Presenter	Speaker Pronoun Preferences	Speaker Title	Speaker Bio (900 characters max)
A.J. Soll	he/him	Director, Strategic Initiatives	A.J. Soll is a graduate of Saint Louis University (BA, History), University of I
Adam Lang	he/him	Product Marketing Manager	Adam Lang is a product marketer at Smartsheet, specializing in Resource h
Alana Suter	she/her	Principal Solutions Consultant	Alana has been with Smartsheet for over 4 years. Currently, she is a Princip
Alexandar Chorba		Teamhead Product Development Sourcing Sr	Alexandar Chorbadzhiyski is a Teamhead in product development and sour
Alexander Ford	he/him	Customer Success Account Manager	Alexander has spent the last 4+ years of his career at Smartsheet focused
Alexander Munsornone	referred	Sr Product Manager	Matt is a Sr. Product Manager at Smartsheet, where he has dedicated the p
Alexis Barone	she/her	Senior Solutions Specialist, Project and Portf	Alexis has been with Smartsheet for two and a half years, serving as an inte
Alise Herring		Principal Consultant, M2 Strategy	Alise Herring is a Principal Management Consultant for M2 Strategy and wa
Alissa Johnson	she/her	Director, Product Management	As Director of Product Management, Alissa leads the Views Experiences te
Ally Robertson	she/her	Large Enterprise Solutions Engineer	Ally has been a part of Smartsheet for three years, initially spending two ye
Amy Nguyen	she/her	Commercial Solutions Engineer	Amy's tenure at Smartsheet began 5 years ago as a Product Trainer, where
Amy Yarrington	she/her	Senior Solutions Engineer	Amy Yarrington brings over 25 years of invaluable expertise in portfolio and
Anchal Kumar	he/him	Sr Product Manager	Anchal has been with Smartsheet for over two years, where he currently lea
Ander Tallett		Founder & CEO	Founder & CEO of DigitalRadius, a Platinum Smartsheet partner. Built and
Andrew Rustemey		CEO	
Angie Andersen	she/her	Senior Solution Engineer	Angie has spent the last 5 years at Smartsheet. Her journey at Smartsheet
Ashley Delay	she/her	IT Project Coordinator	Ashley Delay joined Theisen's in 2021 as the eCommerce Site Merchandis
Ben Canning	he/him	SVP Product Experiences	Ben joined Smartsheet in 2018. He is a customer-obsessed and energetic p





Ramani Katari
Sr. Director, Product Management

Ramani Katari is a Senior Director of Product Management at Smartsheet focused on helping new users build amazing Smartsheet solutions that solve their business problems. Ramani leads a team of Product managers who look to make new user onboarding, solution building and portfolio solution building and updating engaging, seamless and reliable for end users.

Recap

How to build your first solution in Smartsheet



1. Create

How to get started



2. Connect

How it all works together



3. Customize

How to build it out



4. Collaborate

How to collaborate for success

Next steps...

- Try it yourself!
- Recommended Sessions:
 - Getting started with dashboards (1pm)
 - Sneak peek: AI-powered evolution of Smartsheet (Wed 1pm)
 - Enhance collaboration with Smartsheet (Wed 2:30pm)

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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ENGAGE

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



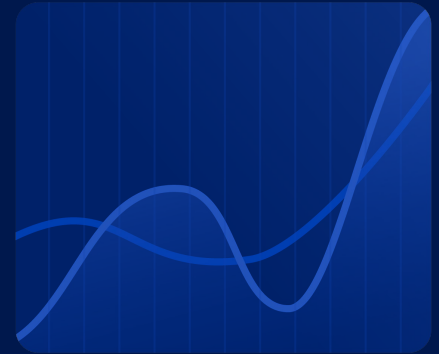
@smartsheet



@smartsheet



@smartsheet



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