



ENGAGE

# Maximize project efficiency with new views

SEA21

Alissa Johnson, Amy Yarrington

v.07/16

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# Session Speakers



**Alissa Johnson**  
Director, Product Management



**Amy Yarrington**  
Sr. Solutions Engineer,  
Large Enterprise



# Learning Objectives



**Identify optimal  
uses for timeline  
view**



**Customize, use,  
and share  
timeline view**



**Be ready to use  
table view after  
release**

# Table of contents

**1**

Introducing timeline view

**2**

Real world examples of  
timeline view

**3**

Tips for optimal use of  
timeline view

**4**

Future of new views

**What are new views?**



# Smartsheet views

- Provide the core work surface for project, program, and process management
- Seamlessly switch between different views based on mode of work
- Leverage conversations, automations, proofs, and more to collaborate on work





# New views. More choices

Choose the view that best fits your work.

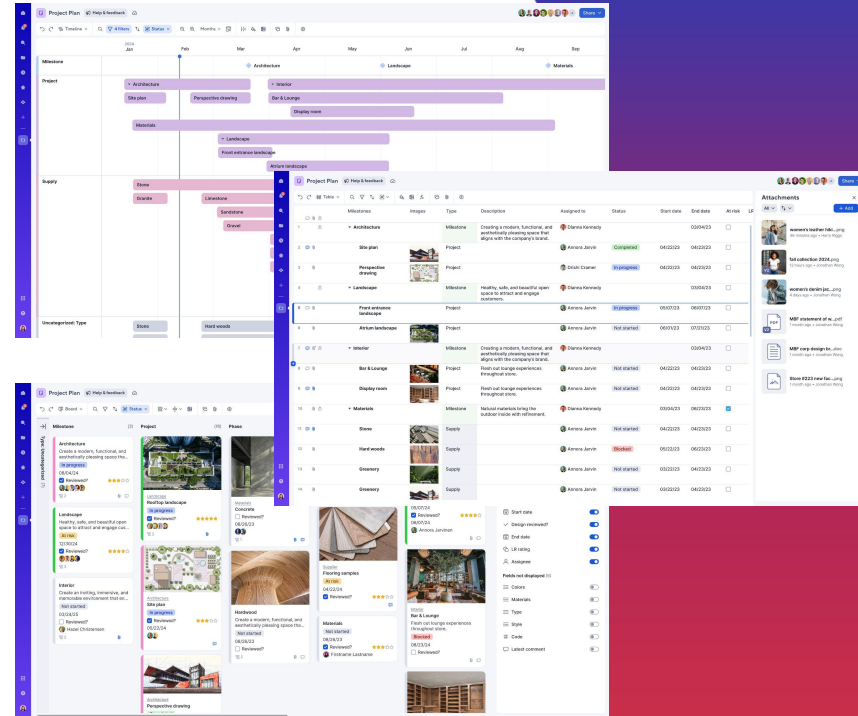
New views join calendar, card, grid and Gantt to provide you with more ways to view and manage your work.

**Timeline** for visualizing and communicating plans, roadmaps, campaigns, and more

**Board** for kanban and visual work management

**Table** (available in EAP) - a modern, scalable experience for managing projects and processes

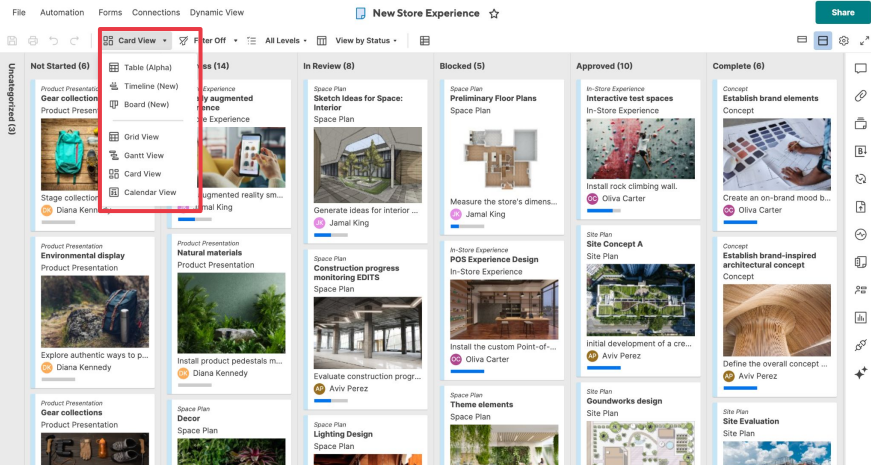
All with live collaboration, continuous save, greater accessibility, a modern look and feel and fast performance.



# Parallel experience

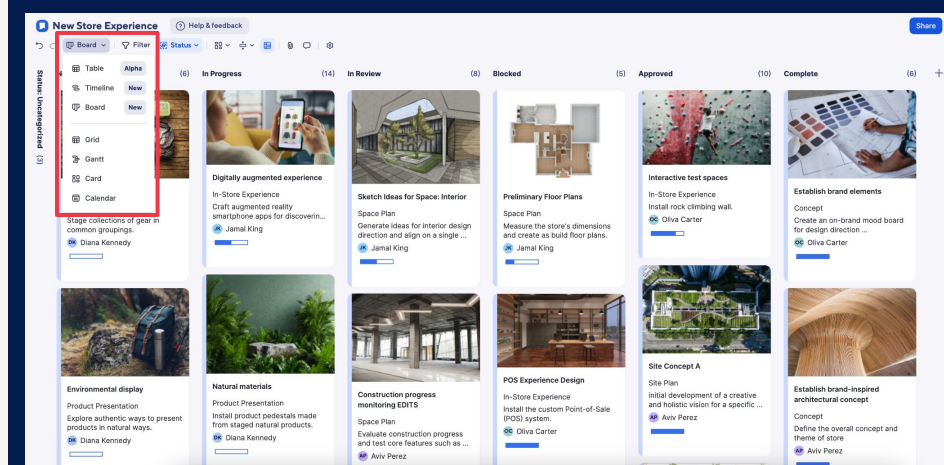
## Seamlessly switch between new and existing views

Each new view will release alongside existing views, and is easily switchable per user, per sheet, allowing users to interact with and edit sheet information in the view of their choice.



### Existing Views

All existing features  
Supports all scenarios including solution building



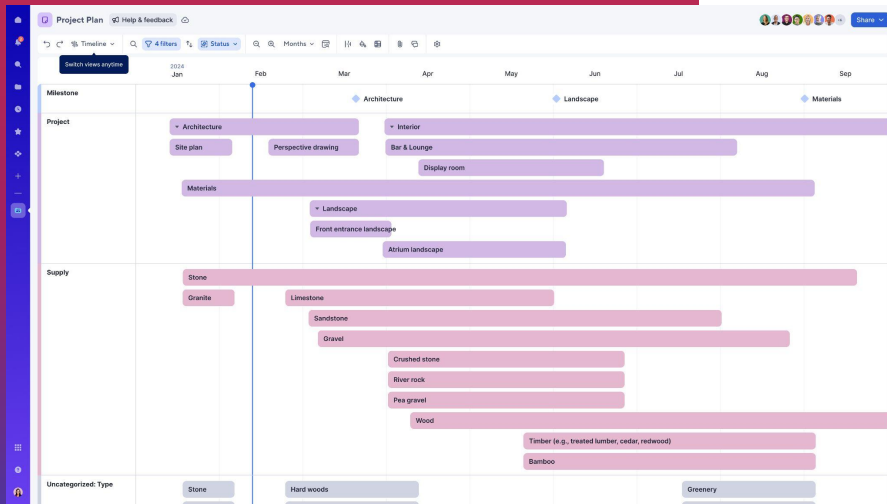
### New Views

Modernized core feature set (expanding over time)  
Optimized for managing and collaborating on work

1

## Introducing timeline view

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# Why did we build timeline view?

Customers wanted a visual roadmap

- High-level summary of time-based work
- Group work thematically
- Zoom in/out from days to years
- Edit item details and see real-time changes
- Collaborate using conversations and attachments



**"Timeline is a visual masterpiece,  
ideal for presenting our  
high-level project timelines  
to executive sponsors.**

**It's simple to group  
project schedules by phase  
and clearly see expected  
completion times."**

Samuel Mueller  
Project Business Analyst, Memorial Health

# 2

## Real world examples of timeline view

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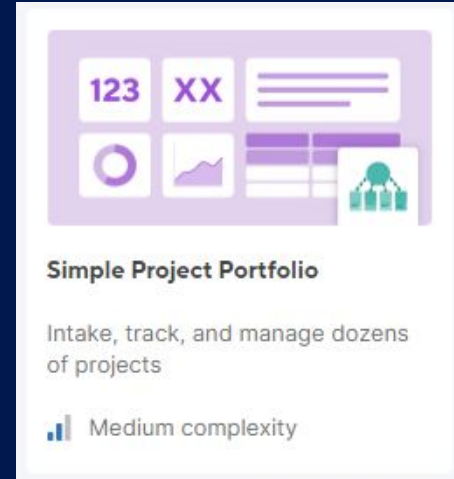
# Simple Project Portfolio Template Set

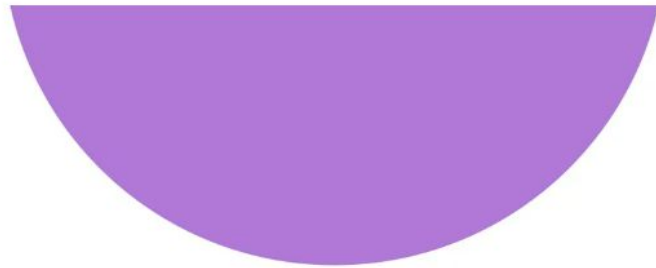
Free in the Solution Gallery

**Do you have more than one project?  
You have a portfolio!**

This template contains:

- Portfolio intake sheet (list of all projects)
- Project plan to duplicate
- Dashboards and reports for project and portfolio





# Portfolio Overview

## Simple Project Portfolio

### Summary

#### Projects

Portfolio Focus

1

Pending Approval

2

Active

0

Blocked

0

At Risk

### Throughput

7

Portfolio Volume

4

Complete

### Starting Next

P-0001

###

#### Financial Systems Upgrade

Name

Upgrade and modernize the company's financial systems to streamline processes and enhance data analysis.

Description

08/06/24

Start Date

### Ending Next

P-0004

###

#### Digital Marketing Campaign

Name

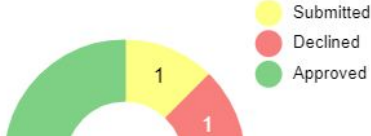
Execute a comprehensive digital marketing campaign to increase brand awareness and generate qualified leads.

Description

11/28/24

End Date

### Approval Status



### Portfolio Status



### Budget Breakdown

Name	###	Budget	Actual	Variance
<b>Total</b>	Count	Sum	Sum	Sum
	6	\$2,100,000.00	\$2,056,989.66	\$43,010.34
Status	Count	Sum	Sum	Sum
<b>Complete</b>	4	\$1,750,000.00	\$1,899,689.66	-\$149,689.66
Status	Count	Sum	Sum	Sum



	Created date	Created by	###	Name	Description	Department	Category	Approved By	Approval Status	Priority	Assigned To	Project Plan	Status	Start Date	End Date	At Risk	Budget	Actual	Variance
1	09/12/23	Harley Sterling	P-0001	<b>Financial Systems Upgrade</b>	Upgrade and modernize the company's financial systems to streamline processes and enhance data analysis.	Accounting & Finance	System Upgrade	Olivia Carter	Approved	Medium	Aviv Perez	<a href="#">Work Breakdown Schedule</a>	In Progress	09/03/24	02/15/25	<input type="checkbox"/>	\$200,000	\$107,000	\$93,000
2	09/12/23	Jamal King	P-0002	<b>Employee Performance Management Tool</b>	Develop an automated tool to streamline employee performance tracking, goal setting, and feedback processes.	Human Resources	Process Automation	Vera Bowers	Declined	Low	Sheldon Greene		Blocked	09/30/24	04/11/25	<input type="checkbox"/>	\$100,000	\$0	\$100,000
3	09/12/23	Guadalupe Garcia	P-0003	<b>Network Infrastructure Upgrade</b>	Upgrade and optimize the company's network infrastructure to enhance security, reliability, and performance.	Information Technology	Infrastructure Upgrade	Vera Bowers	Approved	High	Aviv Perez		Complete	08/01/24	11/26/24	<input type="checkbox"/>	\$300,000	\$317,533	-\$17,533
4	09/12/23	Harley Sterling	P-0004	<b>Digital Marketing Campaign</b>	Execute a comprehensive digital marketing campaign to increase brand awareness and generate qualified leads.	Marketing	Marketing Campaign	Olivia Carter	Approved	Medium	Aviv Perez	<a href="#">Work Breakdown Schedule</a>	In Progress	09/07/24	12/26/24	<input type="checkbox"/>	\$150,000	\$50,300	\$99,700
5	09/12/23	Guadalupe Garcia	P-0005	<b>Supply Chain Optimization</b>	Implement supply chain optimization strategies to reduce costs, improve efficiency, and enhance supplier collaboration.	Operations	Process Optimization	Jonathon Wor	Submitted	High	Sheldon Greene		Not Started	11/29/24	05/03/25	<input type="checkbox"/>	\$250,000	\$0	\$250,000
6	09/12/23	Jamal King	P-0006	<b>New Product Development</b>	Lead the development and launch of a new innovative product, from ideation and market research to	Product Development	New Product Launch	Jonathon Wor	Approved	Low	Sheldon Greene		Complete	07/02/24	05/18/25	<input type="checkbox"/>	\$1,000,000	\$887,251	\$112,749

### Intake & Management

Actions

- ☆  Active by Department & Category
- ☆  Active Work Breakdown Schedules by Assignee
- ☆  Budget Breakdown
- ☆  Completed
- ☆  Portfolio Intake
- ☆  Portfolio Metrics
- ☆  Portfolio Overview
- ☆  Portfolio Submission & Status

# Overview Dashboard

## Simple Project Portfolio

### Summary

P-0001

###

### \* Financial Systems Upgrade \*

Name

Upgrade and modernize the company's financial systems to streamline processes and enhance data analysis.

Description

Medium priority submission created by Harley Sterling on 08/13/24 9:49 AM

Priority

### Schedule

08/06/24

Start Date

01/18/25

End Date



Aviv Perez

Assigned To

In Progress

Status

\$200,000.00

Budget

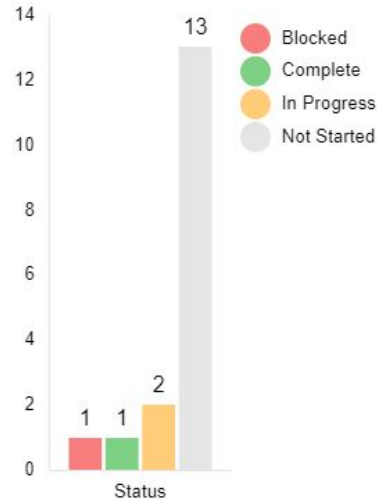
\$107,000.00

Actual

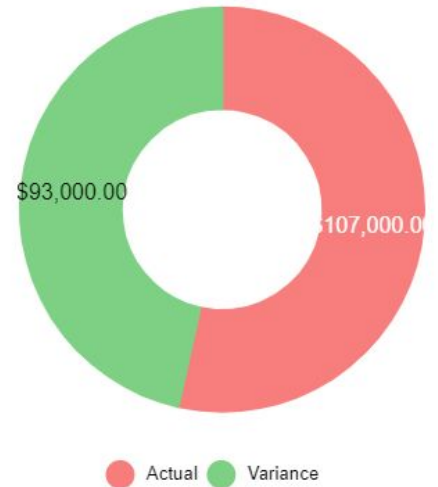
\$93,000.00

Variance

### Status



### Budget Consumption



File Automation Forms Connections Dynamic View **Work Breakdown Schedule** ☆

Grid View Filter Arial 12 B I U G A

	Skip WBS	WBS	Name	Description	Assigned To	Status	Start Date	End Date	At Risk	Budget	Actual	Variance
1	<input checked="" type="checkbox"/>		<b>P-0001</b>	Medium priority submission created by Harley Sterling on 08/13/24 9:49 AM	Approver, Oliva Carter	Approval status, Approved						
2	<input checked="" type="checkbox"/>		<b>* Financial Systems Upgrade *</b>	Upgrade and modernize the company's financial systems to streamline processes and enhance data analysis.	Aviv Perez	In Progress	08/06/24	01/18/25	<input type="checkbox"/>	\$200,000.00	\$107,000.00	\$93,000.00
3	<input type="checkbox"/>	1	<b>Phase 1</b>						<input type="checkbox"/>			
4	<input type="checkbox"/>	1.1	Database Upgrade	Upgrade database system		In Progress	08/06/24	08/10/24	<input type="checkbox"/>	\$70,000.00	\$65,000.00	\$5,000.00
5	<input type="checkbox"/>	1.1.1	Data Backup	Perform data backup and export		Complete	08/09/24	08/12/24	<input type="checkbox"/>	\$20,000.00	\$19,000.00	\$1,000.00
6	<input type="checkbox"/>	1.1.2	Data Transformation	Implement data mapping and transformation		In Progress	08/12/24	08/15/24	<input type="checkbox"/>	\$25,000.00	\$23,000.00	\$2,000.00
7	<input type="checkbox"/>	1.2	User Interface Upgrade	Upgrade user interface		Blocked	08/15/24	08/18/24	<input type="checkbox"/>	\$50,000.00	\$0.00	\$50,000.00
8	<input type="checkbox"/>	1.2.1	UI Design	Create UI design and mockups		Not Started			<input type="checkbox"/>	\$15,000.00	\$0.00	\$15,000.00

**Work Breakdown Schedule (Save As New)**

Actions

	Name
<input type="checkbox"/> ☆	Deliverables by Status
<input type="checkbox"/> ☆	Project Dashboard
<input checked="" type="checkbox"/> ☆	Work Breakdown Schedule

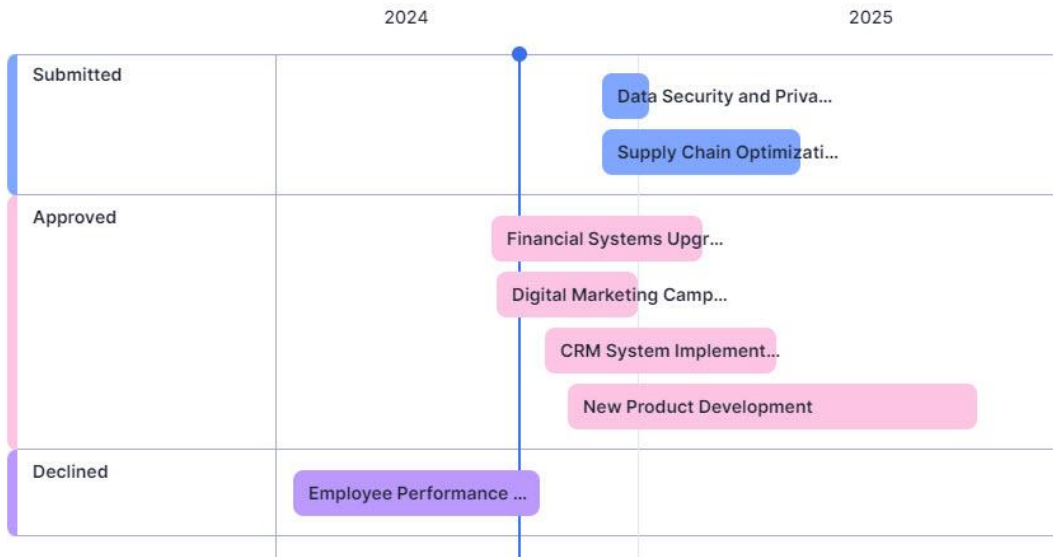
# Contextual use of timeline view

## Portfolio sheet = Roadmap

“Which projects have been approved for funding?”

“When will we deliver this feature?”

“Do we have too many projects occurring at the same time?”



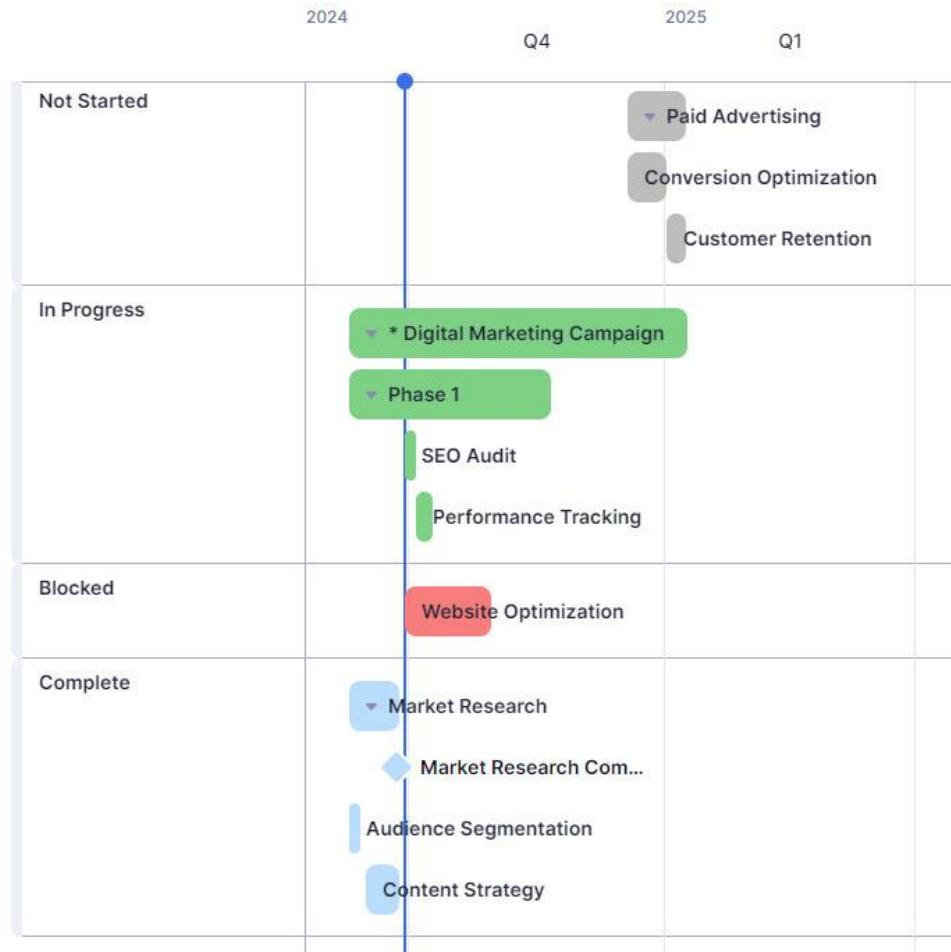
# Contextual use of timeline view

## Project sheet = Schedule

“What tasks are occurring during Phase 1? Which tasks are complete?”

“When will the Market Research be complete?”

“Do we have the same resource assigned to overlapping tasks?”



# Demo

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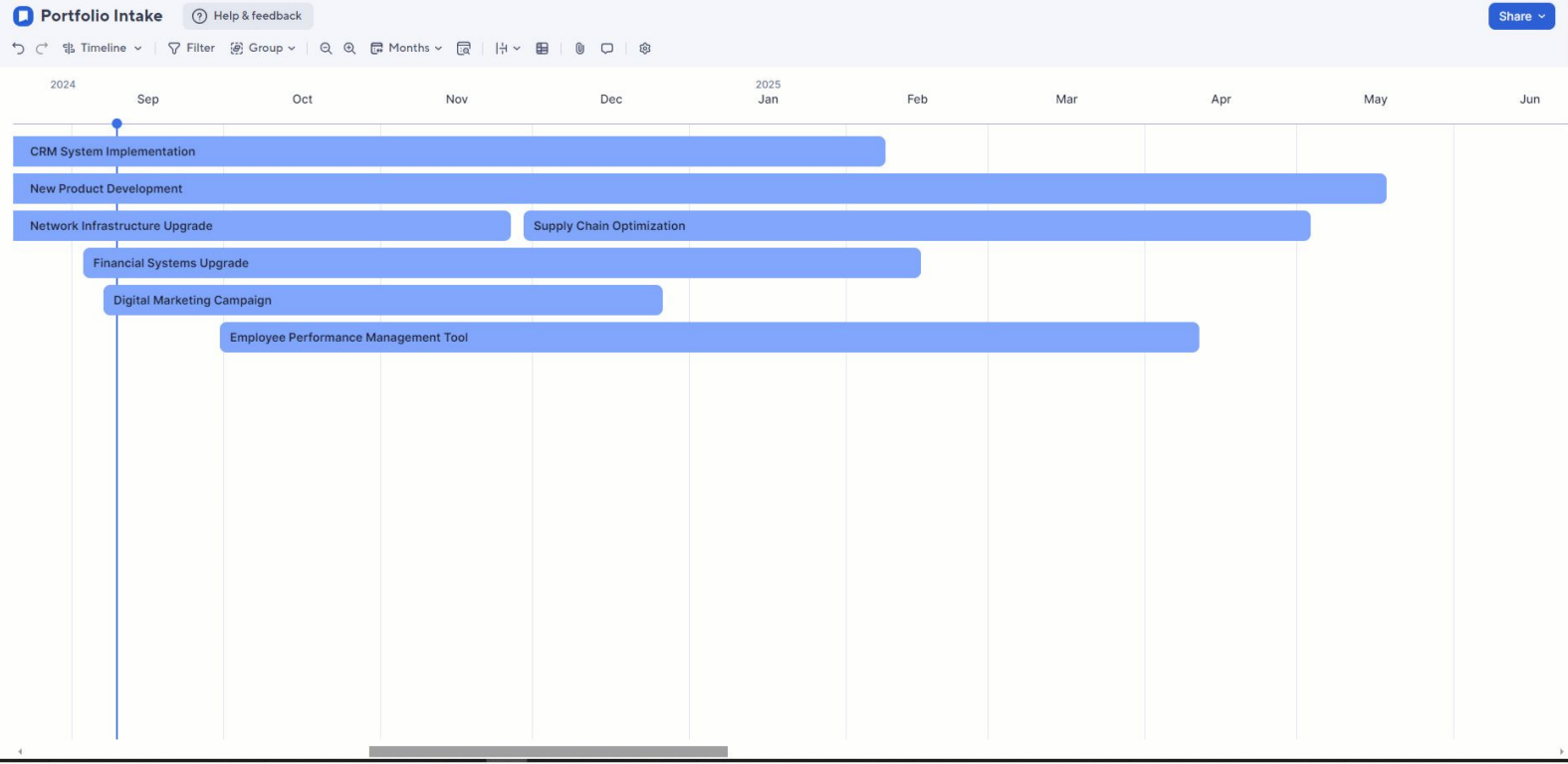
# View switcher

File Automation Forms Connections Dynamic View Portfolio Intake ☆ Share

Grid View Filter Arial 12 B I U Σ \$ % ? .00

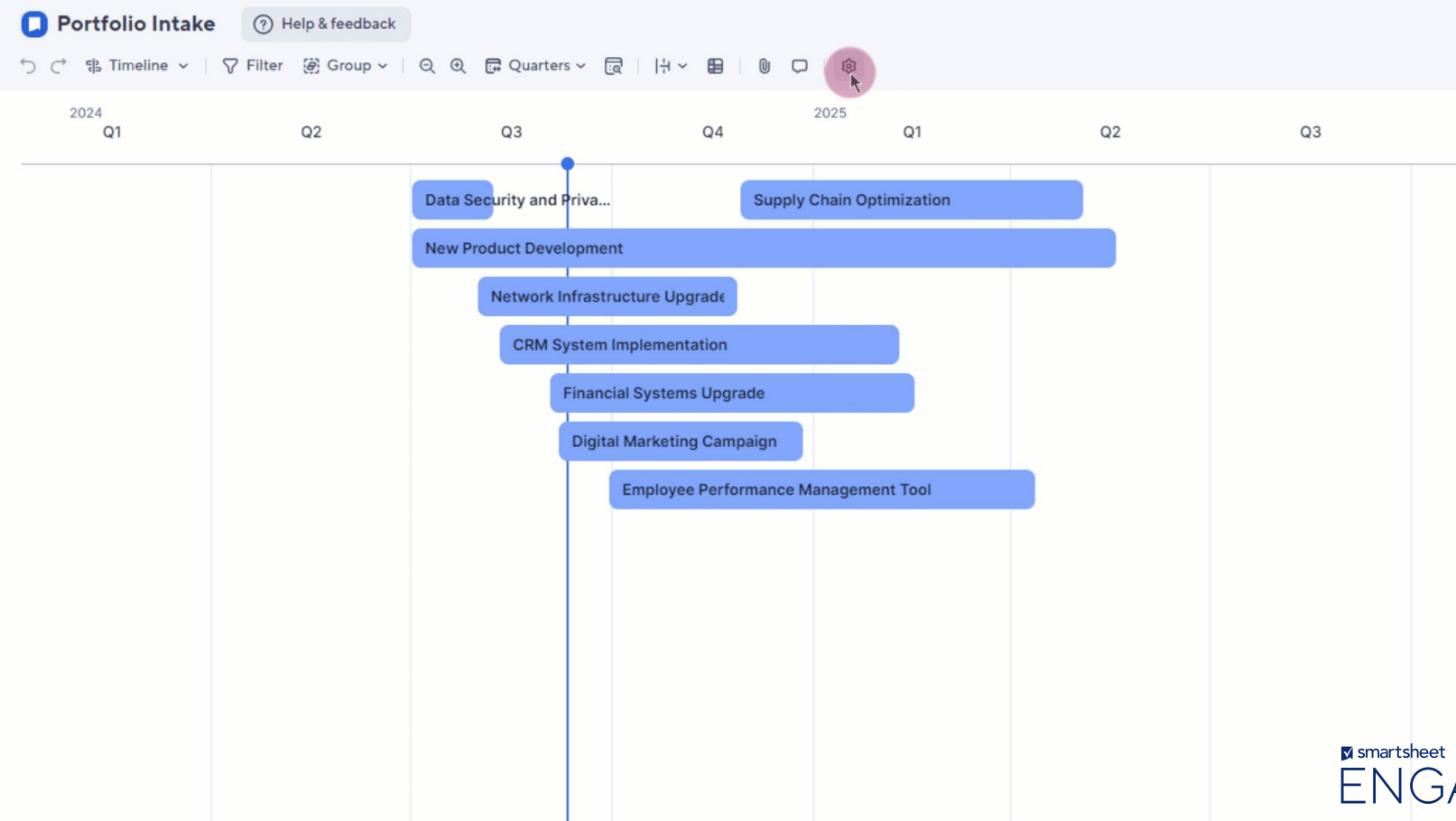
	Created date	Created by	###	Name	Description	Department	Category	Approved By	Approval Status	Priority	Assigned To	Project Plan	Status	Start Date
1	09/12/23	Harley Sterling	P-0001	<b>Financial Systems Upgrade</b>	Upgrade and modernize the company's financial systems to streamline processes and enhance data analysis.	Accounting & Finance	System Upgrade	Olivia Carter	Approved	Medium	Aviv Perez	<a href="#">Work Breakdown Schedule</a>	In Progress	09/08/24
2	09/12/23	Jamal King	P-0002	<b>Employee Performance Management Tool</b>	Develop an automated tool to streamline employee performance tracking, goal setting, and feedback processes.	Human Resources	Process Automation	Vera Bowers	Declined	Low	Sheldon Greene		Blocked	10/05/24
3	09/12/23	Guadalupe Garcia	P-0003	<b>Network Infrastructure Upgrade</b>	Upgrade and optimize the company's network infrastructure to enhance security, reliability, and performance.	Information Technology	Infrastructure Upgrade	Vera Bowers	Approved	High	Aviv Perez		Complete	08/06/24
4	09/12/23	Harley Sterling	P-0004	<b>Digital Marketing Campaign</b>	Execute a comprehensive digital marketing campaign to increase brand awareness and generate qualified leads.	Marketing	Marketing Campaign	Olivia Carter	Approved	Medium	Aviv Perez	<a href="#">Work Breakdown Schedule</a>	In Progress	09/12/24
5	09/12/23	Guadalupe Garcia	P-0005	<b>Supply Chain Optimization</b>	Implement supply chain optimization strategies to reduce costs, improve efficiency, and enhance supplier collaboration.	Operations	Process Optimization	Jonathon Wor	Submitted	High	Sheldon Greene		Not Started	12/04/24
6	09/12/23	Jamal King	P-0006	<b>New Product Development</b>	Lead the development and launch of a new innovative product, from ideation and market research to prototyping and commercialization.	Product Development	New Product Launch	Jonathon Wor	Approved	Low	Sheldon Greene		Complete	07/07/24
7	09/12/23	Guadalupe Garcia	P-0007	<b>CRM System Implementation</b>	Implement a customer relationship management (CRM) system to centralize customer data, improve sales processes, and enhance customer interactions.	Sales	CRM Implementation	Vera Bowers	Approved	Low	Sheldon Greene		Complete	08/16/24
8	09/12/23	Harley Sterling	P-0008	<b>Data Security and Privacy Audit</b>	Conduct a thorough audit of data security and privacy practices to ensure compliance with regulatory requirements and protect sensitive information.	Information Technology	Security Audit	Olivia Carter	Approved	High	Aviv Perez		Complete	07/07/24
9														
10														
11														
12														

# Timescale controls

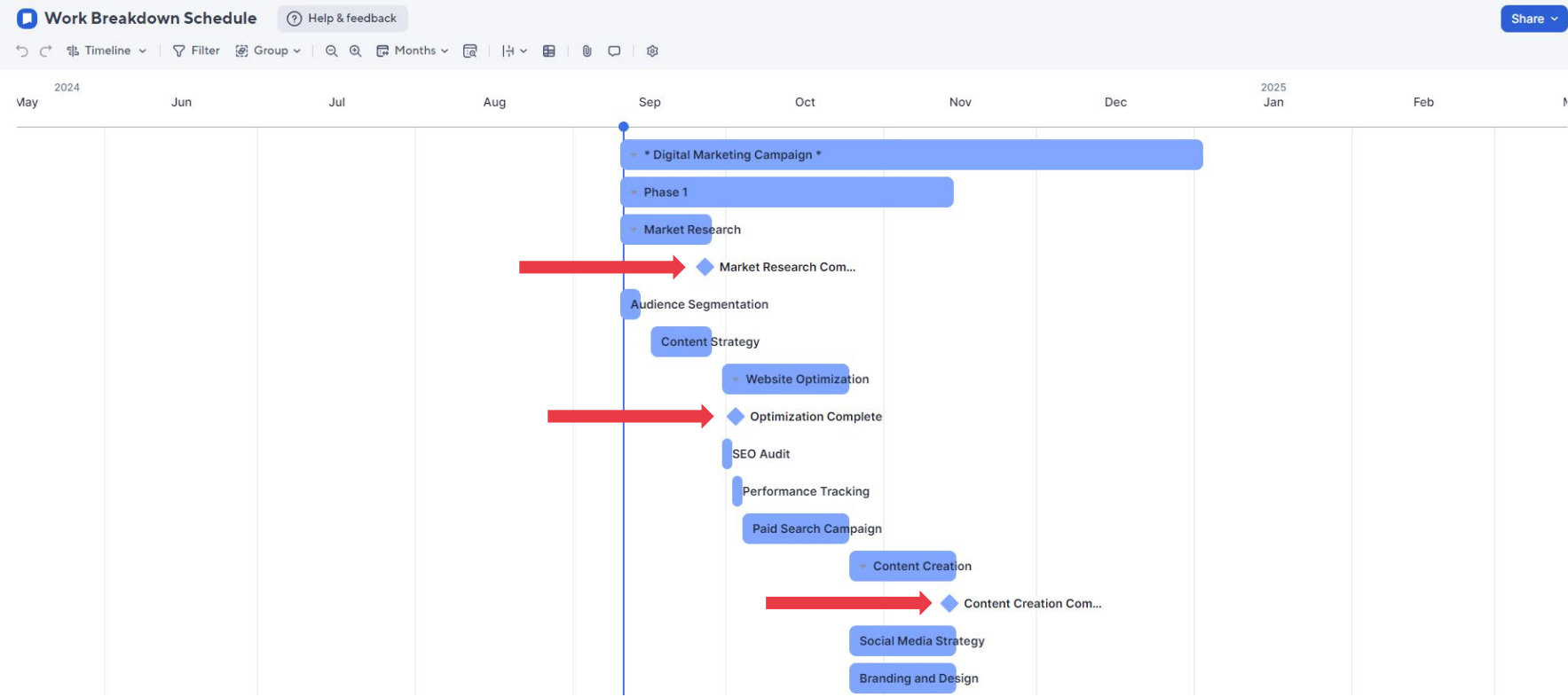




# Changing label text



# Milestones



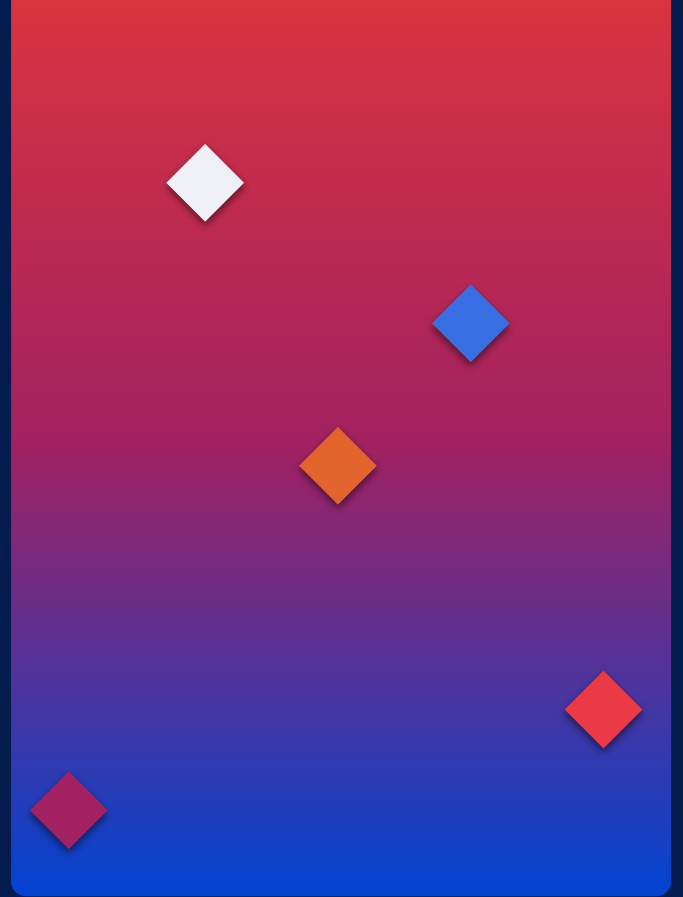
# Milestones

What displays as a diamond vs. a bar?

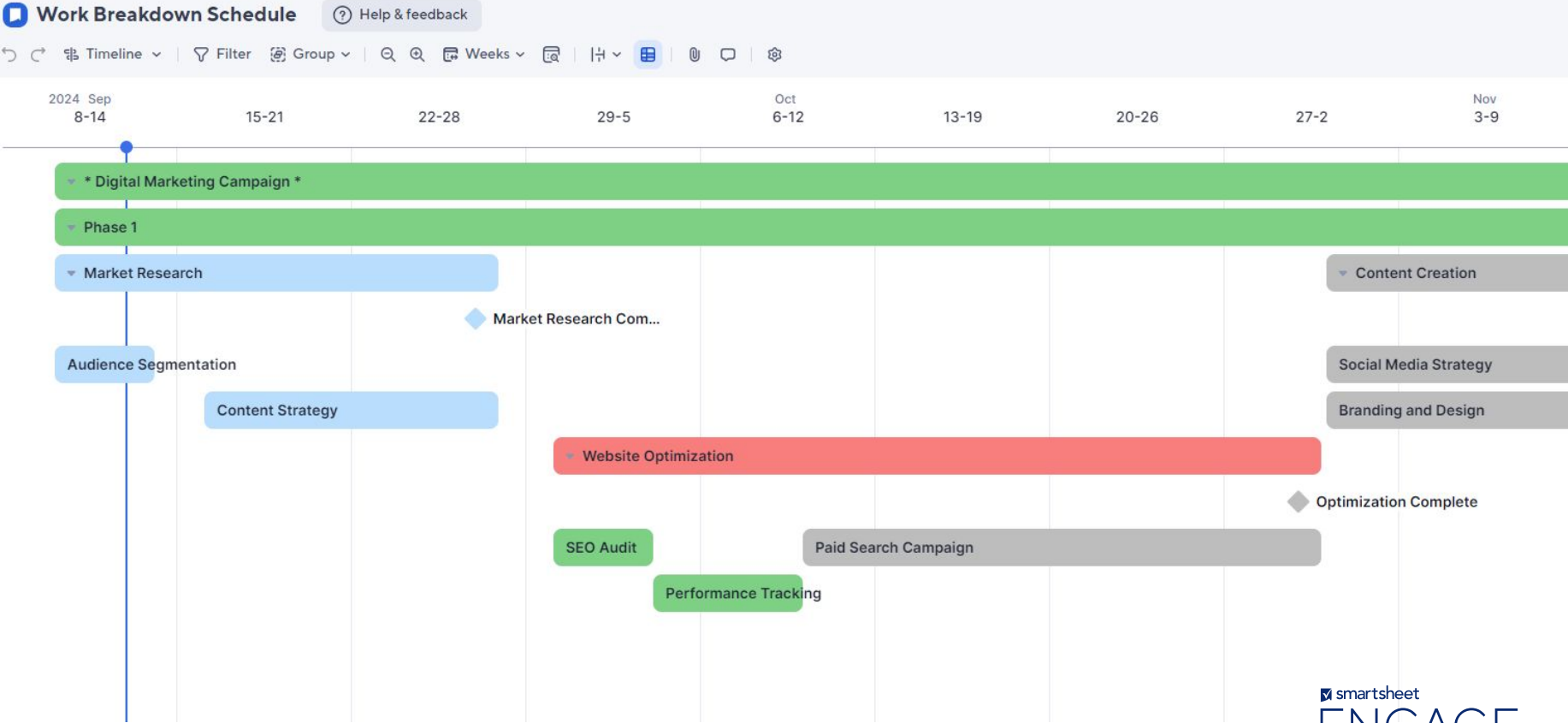
Sheets with only **ONE DATE FIELD**

**OR**

**ZERO DURATION TASKS** on sheets  
with dependencies enabled



# Conditional formatting



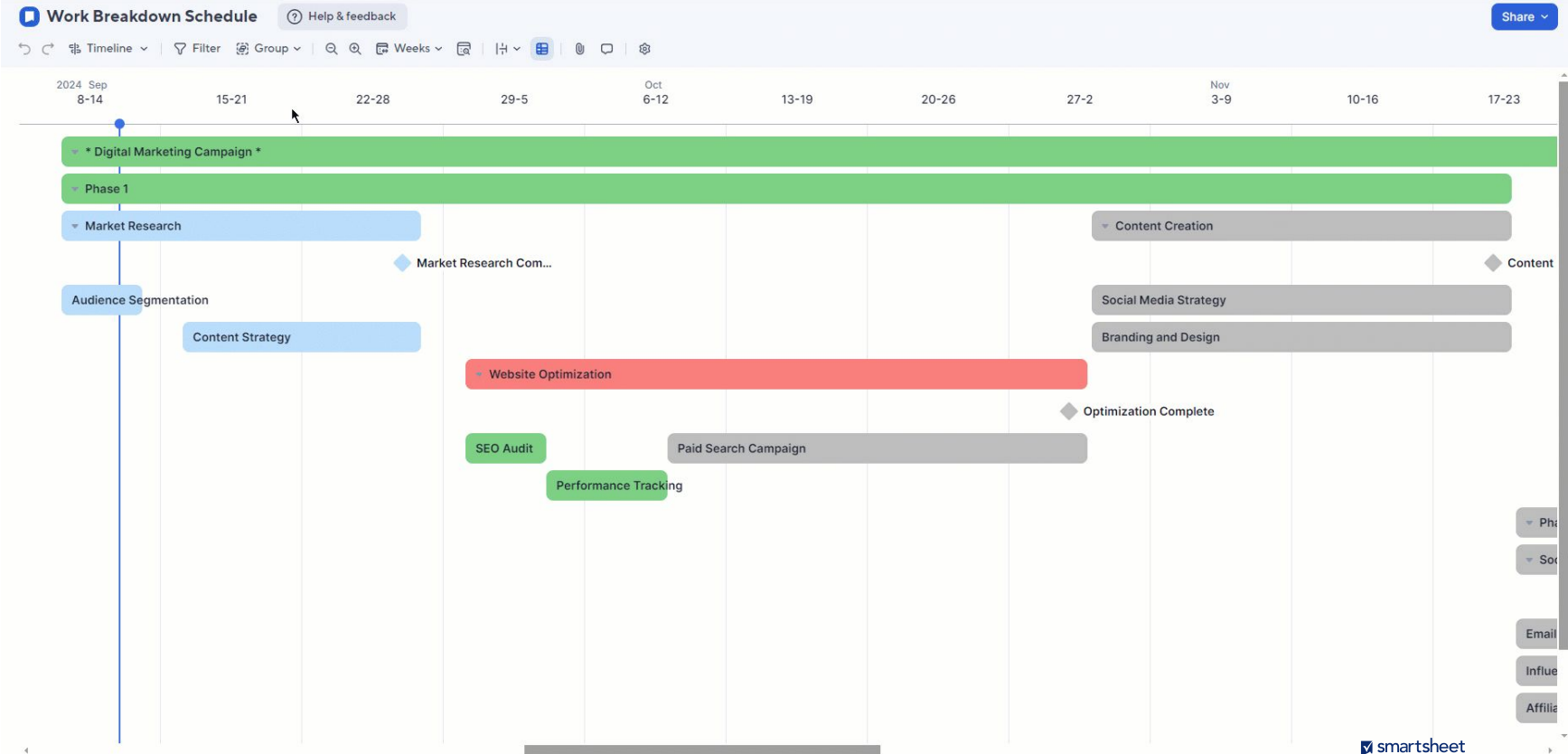
# Conditional formatting

File Automation Forms Connections Dynamic View Work Breakdown Schedule ☆ Share

Grid View Filter Arial 12 B I U Σ \$ % .00

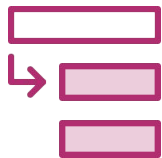
	Skip WBS	WBS	Task	Description	Assigned To	Status	Start Date	End Date	At Risk	Budget	Actual	Variance	Precedes...	Duratio
1	<input checked="" type="checkbox"/>		P-0004	Medium priority submission created by Harley Sterling on 09/12/23 10:38 AM	Approver, Oliva Carter	Approval status, Approved								
2	<input checked="" type="checkbox"/>		* Digital Marketing Campaign *	Execute a comprehensive digital marketing campaign to increase brand awareness and generate qualified leads.	Aviv Perez	In Progress	09/10/24	01/08/25	<input type="checkbox"/>	\$150,000.00	\$50,300.00	\$99,700.00		
3	<input type="checkbox"/>	1	Phase 1			In Progress	09/10/24	11/20/24	<input type="checkbox"/>					
4	<input type="checkbox"/>	1.1	Market Research	Conduct market research and competitor analysis		Complete	09/10/24	09/27/24	<input type="checkbox"/>	\$25,000.00	\$22,000.00	\$3,000.00		
5	<input type="checkbox"/>	1.1.1	Audience Segmentation	Segment target audience and define buyer personas		Complete	09/10/24	09/13/24	<input type="checkbox"/>	\$10,000.00	\$9,800.00	\$200.00		
6	<input type="checkbox"/>	1.1.2	Content Strategy	Develop content strategy and marketing plan		Complete	09/16/24	09/27/24	<input type="checkbox"/>	\$20,000.00	\$18,500.00	\$1,500.00	5	
7	<input type="checkbox"/>	1.1.3	Market Research Complete			Complete	09/27/24	09/27/24	<input type="checkbox"/>				5, 6	
8	<input type="checkbox"/>	1.2	Website Optimization	Optimize website for SEO and performance		Blocked	09/30/24	10/30/24	<input type="checkbox"/>	\$15,000.00	\$0.00	\$15,000.00		
9	<input type="checkbox"/>	1.2.1	SEO Audit	Perform SEO audit and identify improvements		In Progress	09/30/24	10/03/24	<input type="checkbox"/>	\$5,000.00	\$0.00	\$5,000.00	6	
10	<input type="checkbox"/>	1.2.2	Performance Tracking	Set up performance tracking and analytics		In Progress	10/04/24	10/09/24	<input type="checkbox"/>	\$8,000.00	\$0.00	\$8,000.00	9	
11	<input type="checkbox"/>	1.2.3	Paid Search Campaign	Launch paid search advertising campaign		Not Started	10/10/24	10/30/24	<input type="checkbox"/>	\$20,000.00	\$0.00	\$20,000.00	10	
12	<input type="checkbox"/>	1.2.4	Optimization Complete			Not Started	10/30/24	10/30/24	<input type="checkbox"/>				11	
13	<input type="checkbox"/>	1.3	Content Creation	Create engaging content for marketing		Not Started	10/31/24	11/20/24	<input type="checkbox"/>	\$15,000.00	\$0.00	\$15,000.00		
14	<input type="checkbox"/>	1.3.1	Social Media Strategy	Develop social media marketing strategy		Not Started	10/31/24	11/20/24	<input type="checkbox"/>	\$12,000.00	\$0.00	\$12,000.00	8	
15	<input type="checkbox"/>	1.3.2	Branding and Design	Improve branding and design for marketing		Not Started	10/31/24	11/20/24	<input type="checkbox"/>	\$10,000.00	\$0.00	\$10,000.00	8	
16	<input type="checkbox"/>	1.3.3	Content Creation Complete			Not Started	11/20/24	11/20/24	<input type="checkbox"/>				15	
17	<input type="checkbox"/>	2	Phase 2			Not Started	11/21/24	12/18/24	<input type="checkbox"/>					
18	<input type="checkbox"/>	2.1	Social Media Campaign	Launch social media marketing campaign		Not Started	11/21/24	12/18/24	<input type="checkbox"/>	\$30,000.00	\$0.00	\$30,000.00		
19	<input type="checkbox"/>	2.1.1	Influencer Marketing	Collaborate with influencers for brand promotion		Not Started	11/21/24	12/18/24	<input type="checkbox"/>	\$25,000.00	\$0.00	\$25,000.00	13	
20	<input type="checkbox"/>	2.1.2	Email Marketing	Execute targeted email marketing		Not Started	11/21/24	12/11/24	<input type="checkbox"/>	\$15,000.00	\$0.00	\$15,000.00	13	
21	<input type="checkbox"/>	2.1.3	Affiliate Marketing	Implement affiliate marketing program		Not Started	11/21/24	12/18/24	<input type="checkbox"/>	\$10,000.00	\$0.00	\$10,000.00	13	

# Grouping in timeline view



# Grouping in timeline view

What columns can you use?



## Dropdown lists

*Single select only*

Groups will sort in the order the list items are defined



## Symbols

Groups will sort in the order the symbols are defined

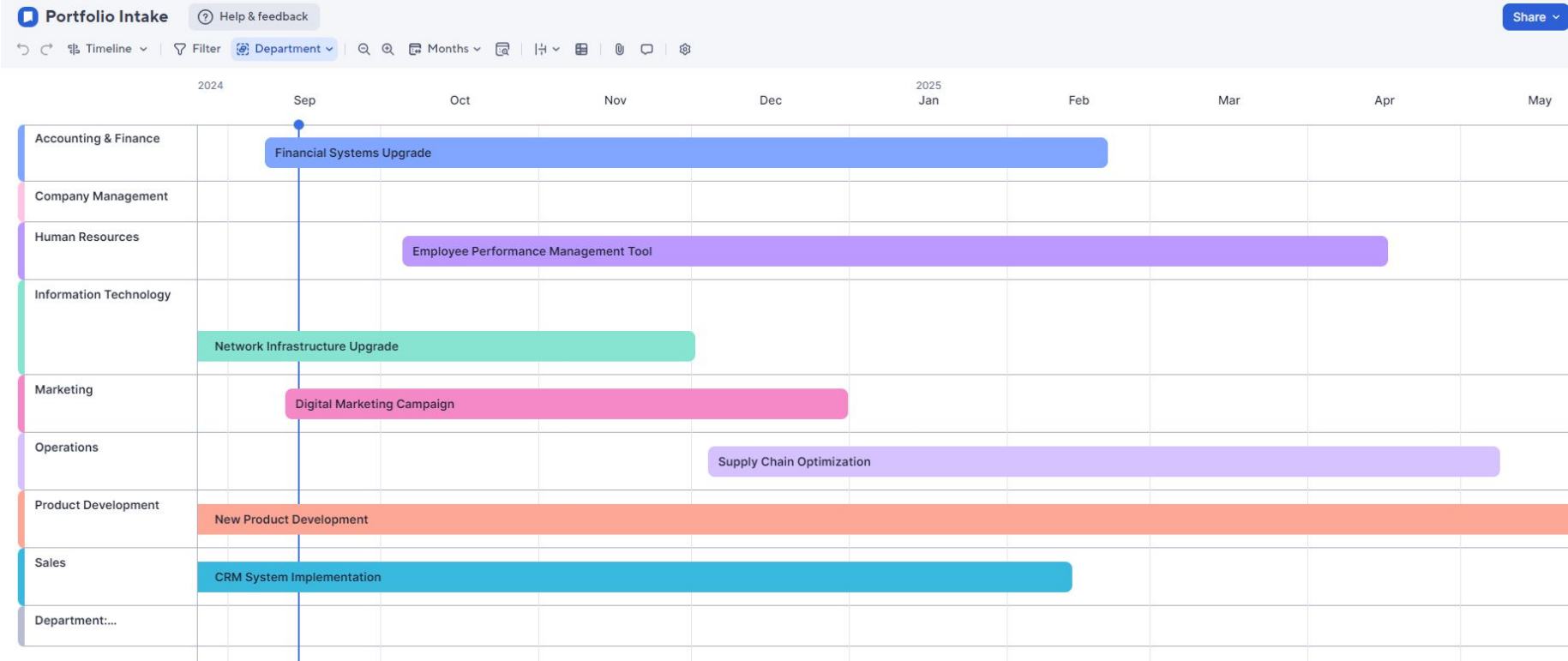


## Contact lists

*Single select only*

Only people in the “preferred contacts list” will appear as groups

# Group colors

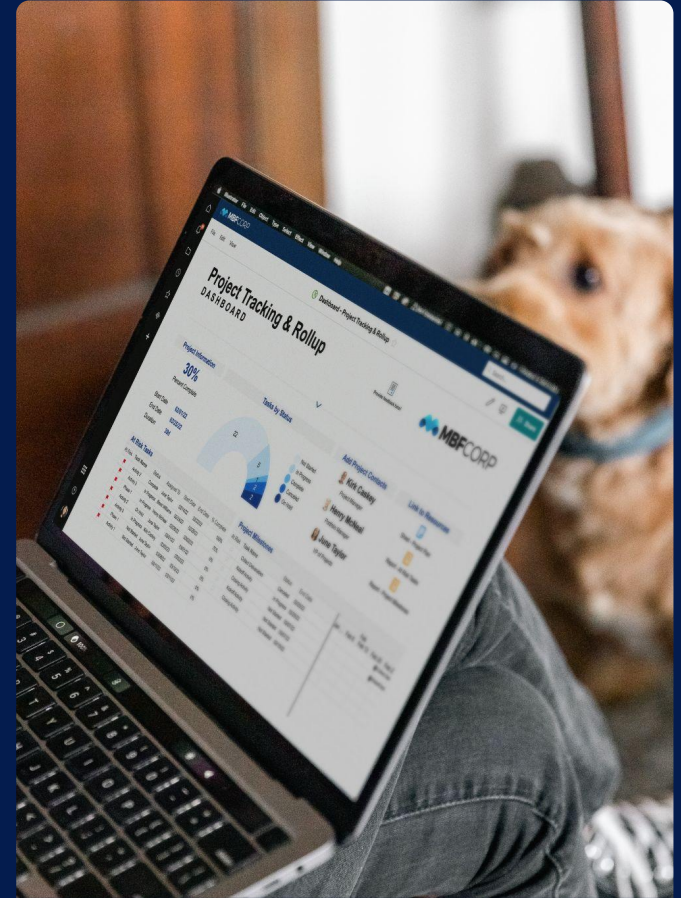




# Grouping in timeline view could eliminate the need for sheet hierarchy

If you have used hierarchy (parent/child rows) in the past to **visually group rows** on your sheet, you might not need it any longer!

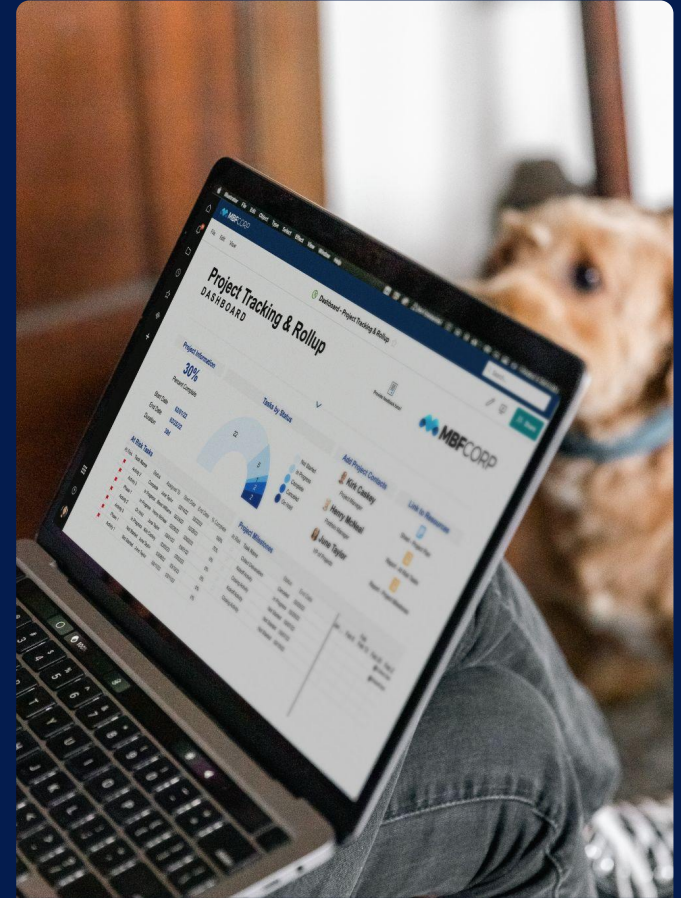
- Hierarchy is useful in project plans for rolling up information into phases or other groups
- Hierarchy in a sheet is not reflected in reports
- **Placing a row in a hierarchy doesn't give it MEANING**



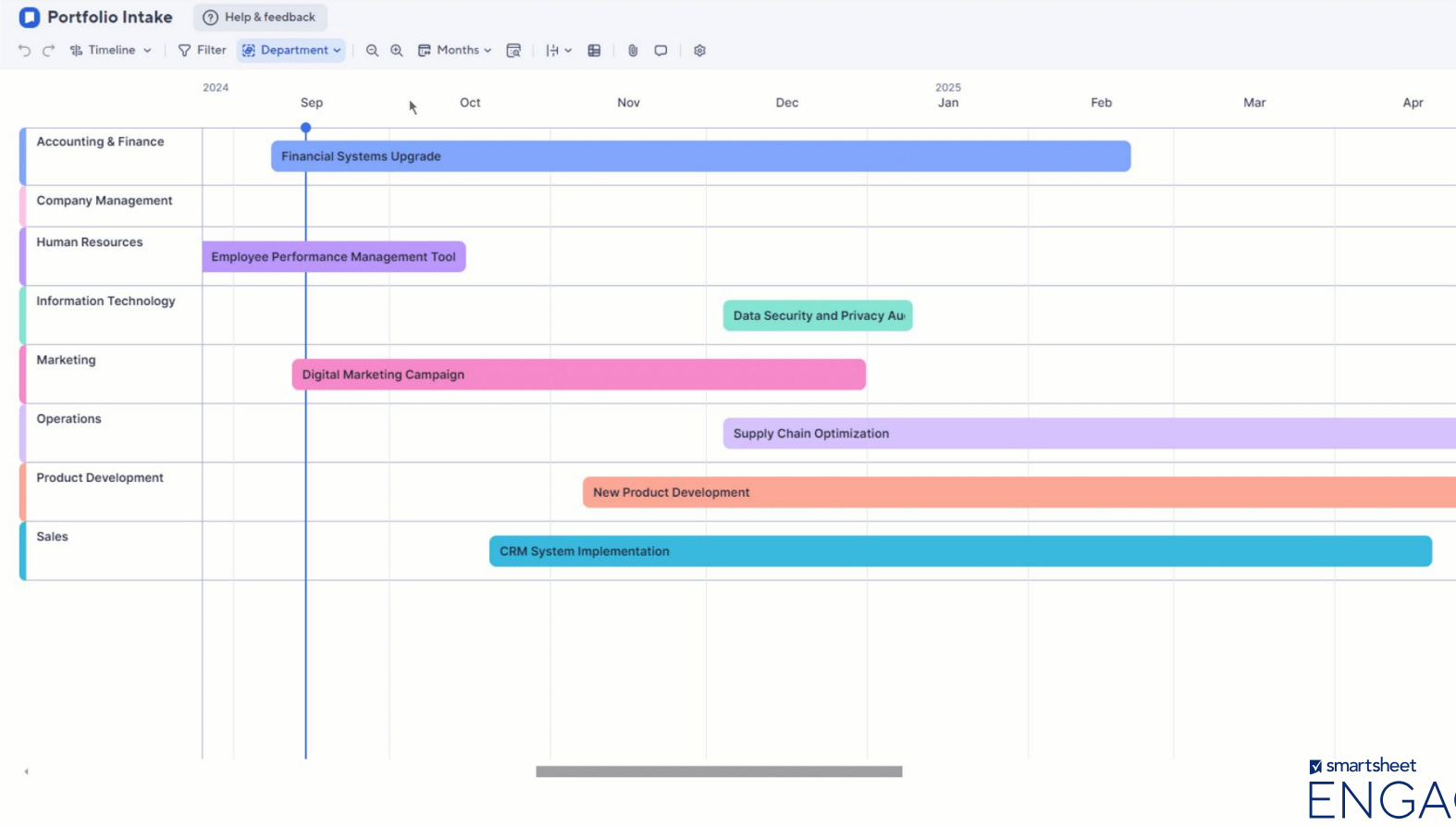
# Power Tip: Add “helper” columns to group and filter rows

**Add columns to the sheet** to store any information that you might want to group or filter by, for example:

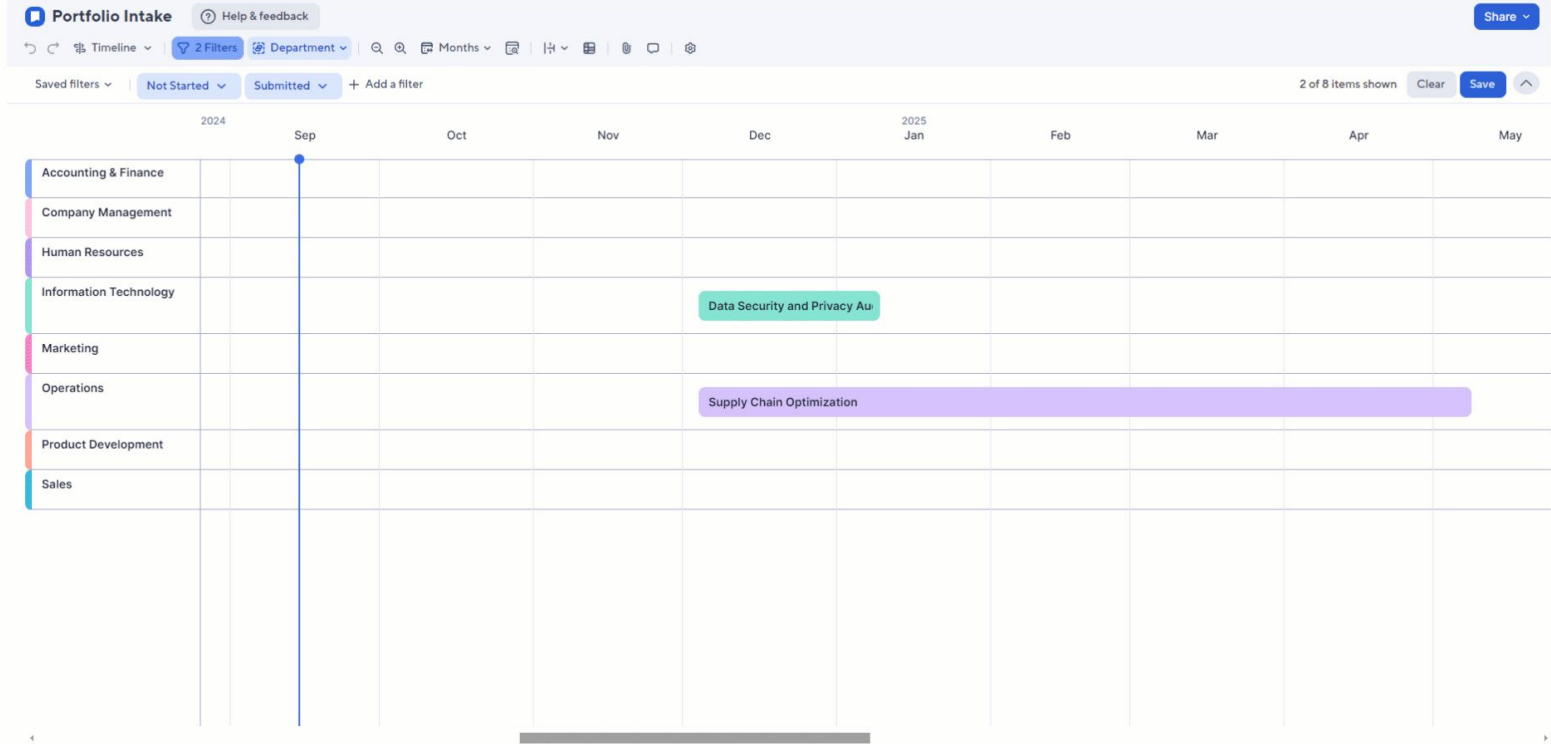
- Category/Type
- Phase
- Status
- Department
- Year/Quarter/Month



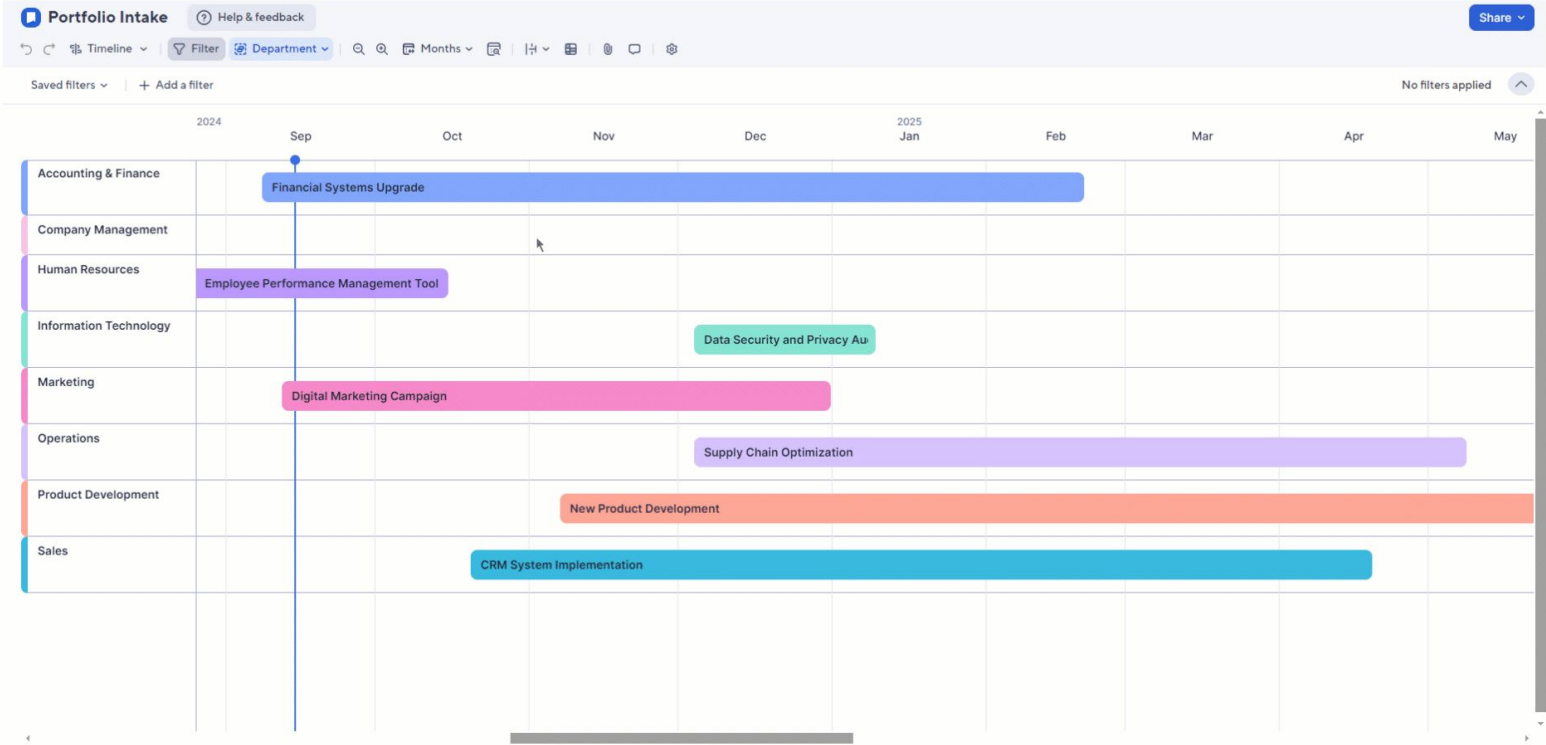
# Filtering in timeline view



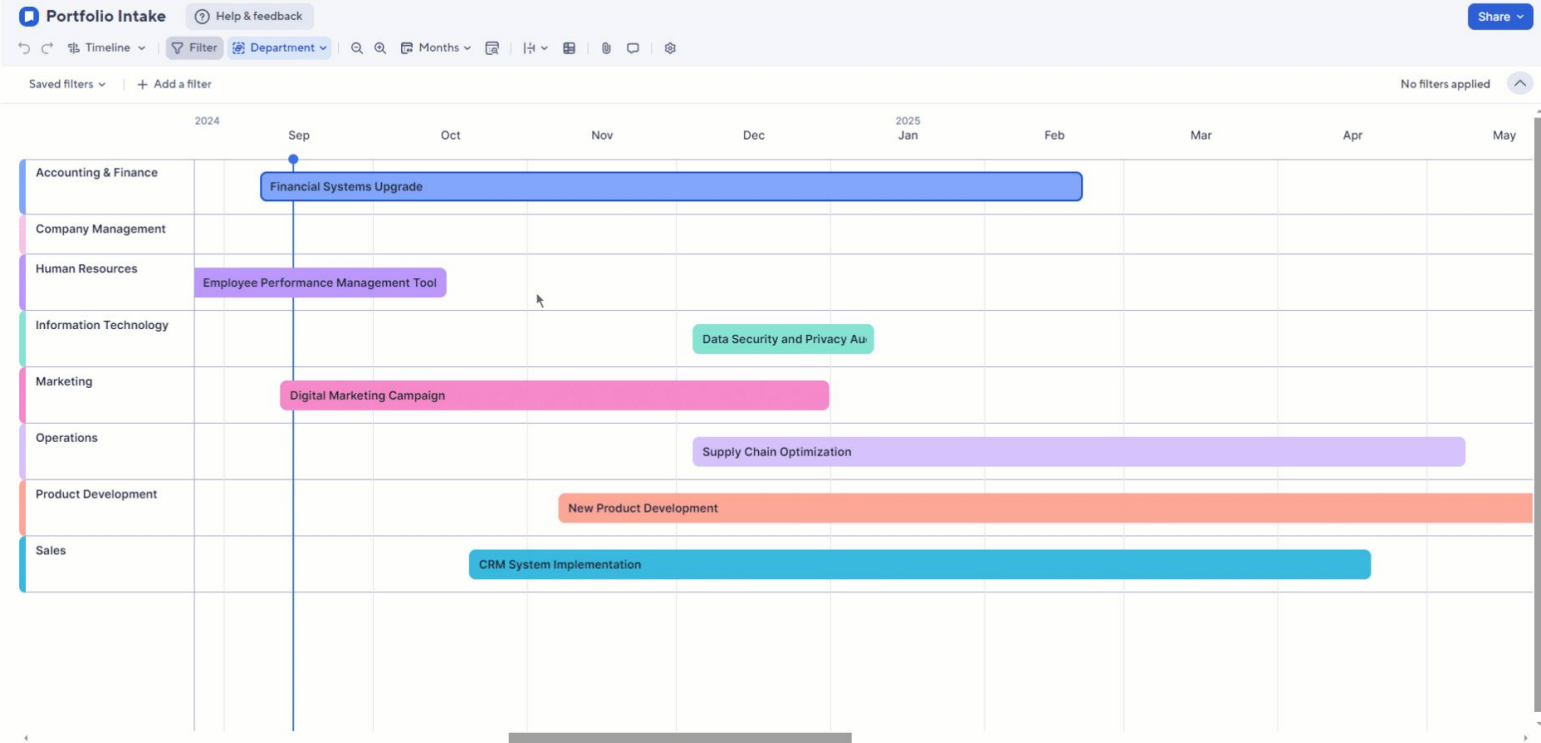
# Filtering in timeline view



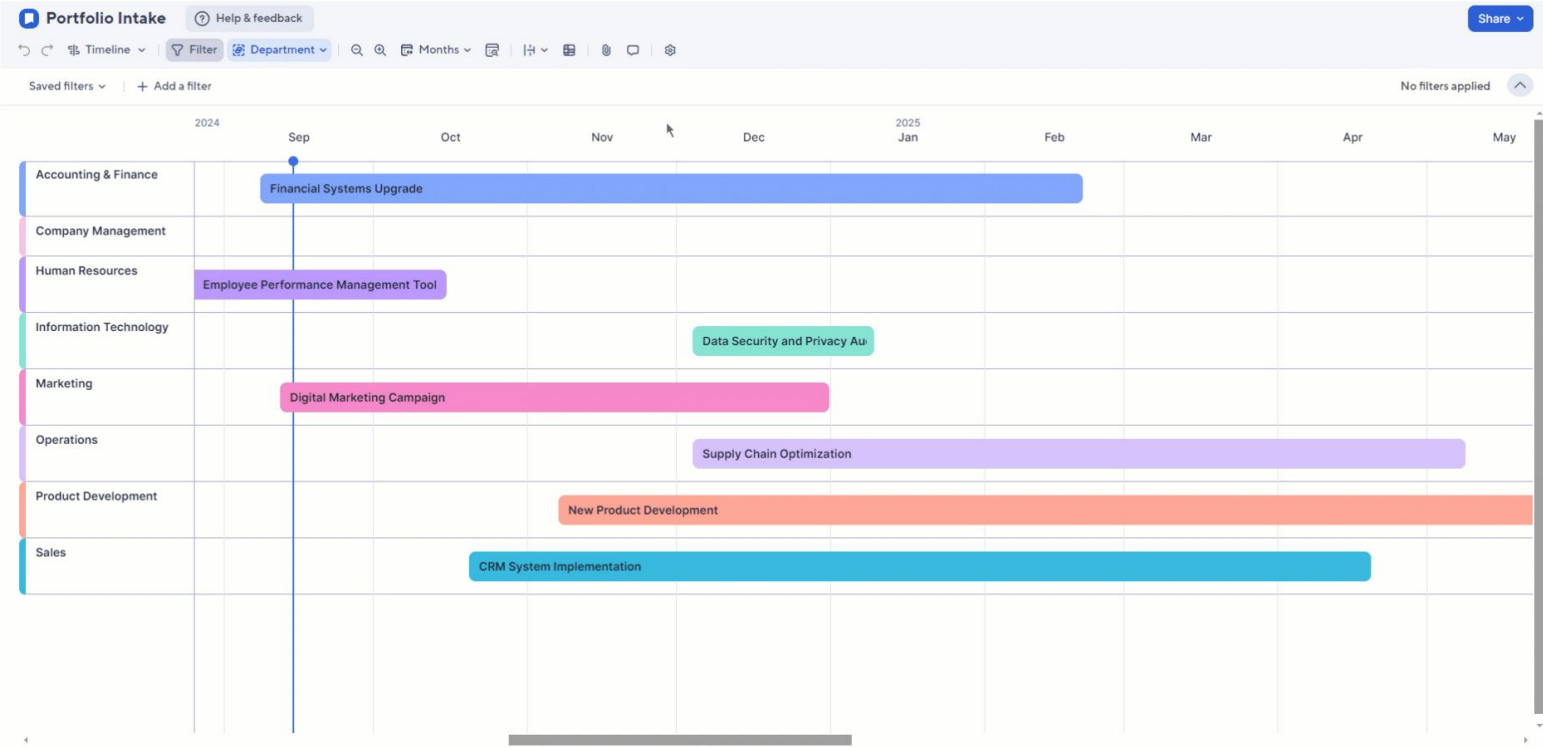
# Editing rows in timeline view



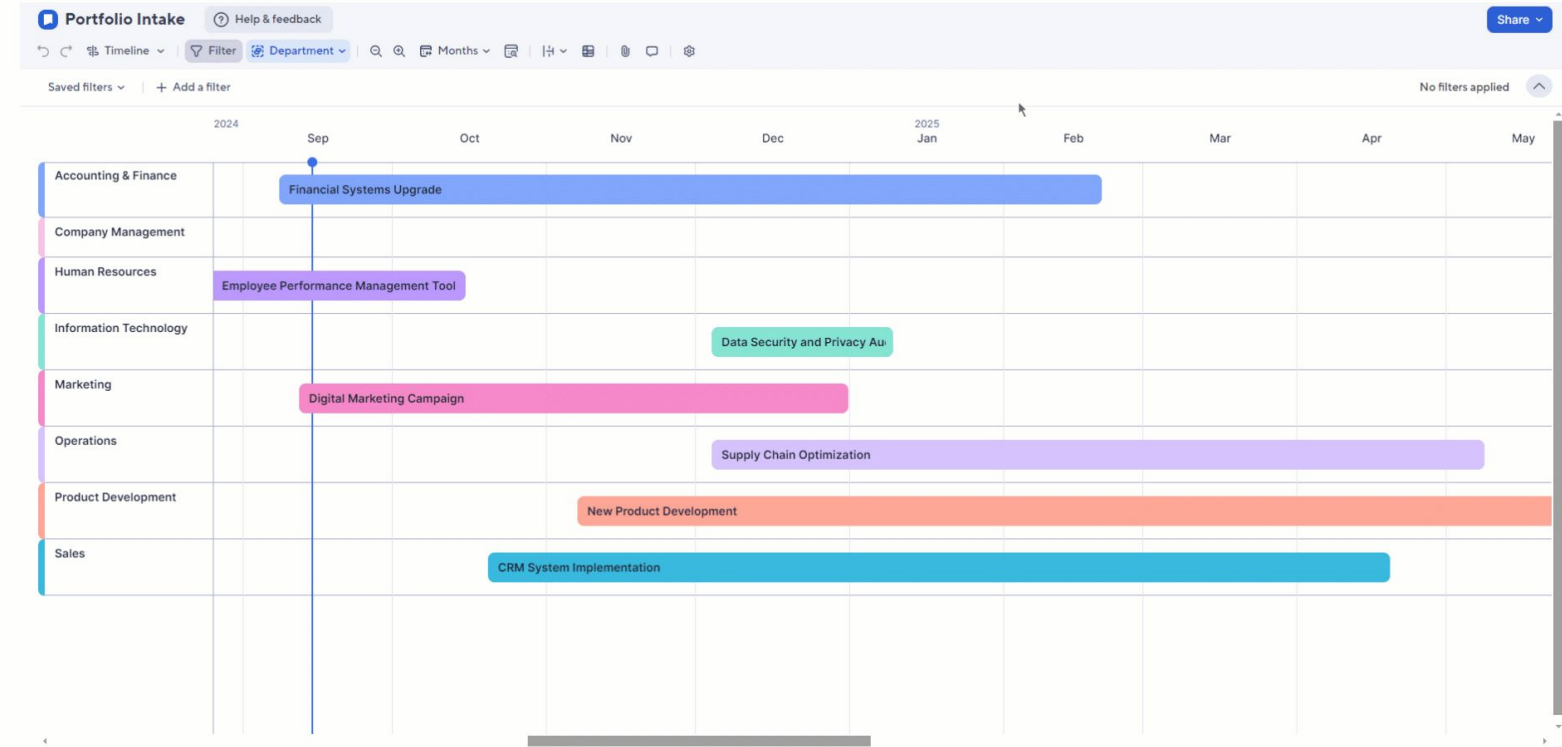
# Attachments in timeline view



# Conversations in timeline view



# Sharing timeline view





# Sharing timeline view

## Use the timeline view URL

**Sharing the URL link of your sheet's timeline view will navigate directly to it with the current grouping and filter already applied**

Remember, people clicking the link must already have access!

Use these links in:

- Dashboard shortcuts and buttons
- Chat messages and emails
- Microsoft Teams "website" tab

3

## Tips for optimal use of timeline view

 smartsheet  
ENGAGE

A woman with long, dark braids is shown from the chest up, looking upwards and to the right with a slight smile. She is wearing a maroon blazer over a green top. The background behind her is a gradient of red and purple.

# Timeline view

## When to use it

- Visualize your schedule over time, without distracting details
- Summarize a product/portfolio roadmap
- Highlight phases and milestones in a schedule



# Timeline view

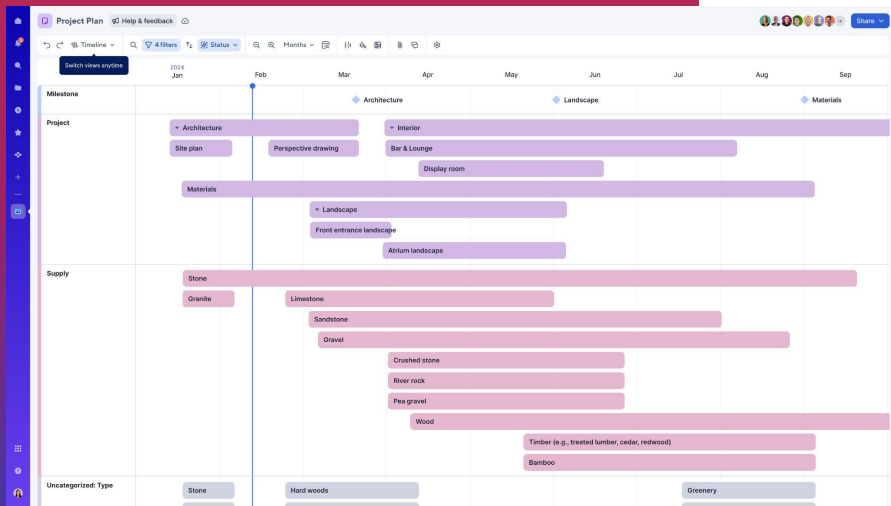
How to use it effectively

- Use **grouping** to segment your data
- Refine groups using the **column properties**
- Configure **conditional formatting** in grid view
- Add **helper columns** to filter and group (ex. by hierarchy level)

4

## Future of new views

 smartsheet  
ENGAGE



# Timeline View

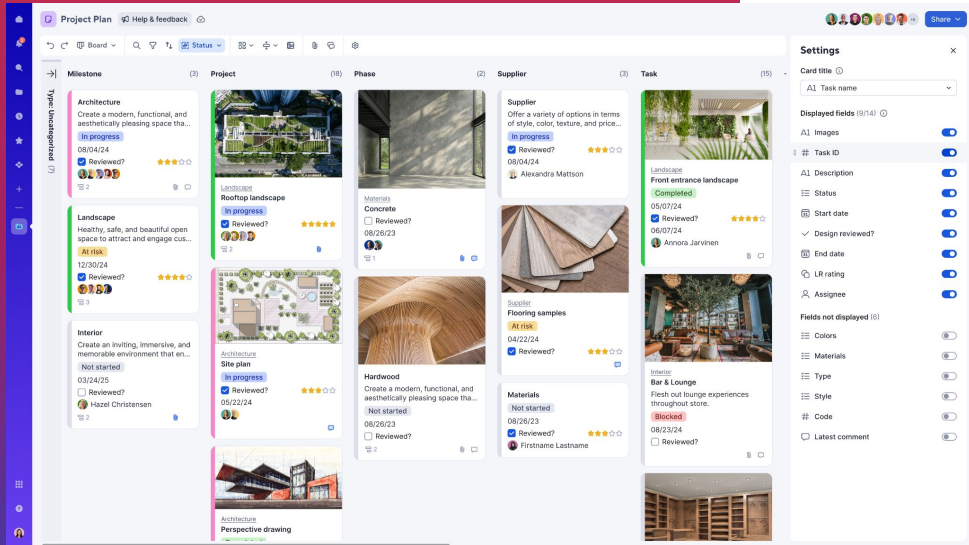
An all new way to see and communicate the overall plan

## Recent improvements:

- Use with single date sheets

## Planned enhancements:

- Create new items directly in timeline
- Expand and collapse hierarchy
- Display additional details on bars
- Embedding in a dashboard



# Board View

All-new more visual view to use for agile, kanban work management

## Planned enhancements:

- Sorting within lanes
- Combined conversations, attachments and RDX panel
- New card coloring experience
- In-line editing

Project Plan Help & feedback

Table

	Milestones	Images	Type	Description	Assigned to	Status	Start date	End date	At risk	LR
1	Architecture		Milestone	Creating a modern, functional, and aesthetically pleasing space that aligns with the company's brand.	Dianna Kennedy		03/04/23			
2	Site plan		Project		Annora Jarvin	Completed	04/22/23	04/23/23		
3	Perspective drawing		Project		Droshi Cramer	In progress	04/22/23	04/23/23		
4	Landscape		Milestone	Healthy, safe, and beautiful open space to attract and engage customers.	Dianna Kennedy		03/04/23			
5	Front entrance landscape		Project		Annora Jarvin	In progress	05/07/23	06/07/23		
6	Atrium landscape		Project		Annora Jarvin	Not started	06/01/23	07/21/23		
7	Interior		Milestone	Creating a modern, functional, and aesthetically pleasing space that aligns with the company's brand.	Dianna Kennedy		03/04/23			
8	Bar & Lounge		Project	Flesh out lounge experiences throughout store.	Annora Jarvin	Not started	04/22/23	04/23/23		
9	Display room		Project	Flesh out lounge experiences throughout store.	Annora Jarvin	Not started	04/22/23	04/23/23		
10	Materials		Milestone	Natural materials bring the outdoor inside with refinement.	Dianna Kennedy		03/04/23	06/23/23		
11	Stone		Supply		Annora Jarvin	Not started	04/22/23	04/23/23		
12	Hard woods		Supply		Annora Jarvin	Blocked	06/22/23	06/23/23		
13	Greenery		Supply		Annora Jarvin	Not started	03/22/23	04/23/23		
14	Greenery		Supply		Annora Jarvin	Not started	03/22/23	04/23/23		

Attachments

- women's leather hbk...png (6 minutes ago) • Harry Rigg
- fall collection 2024 .png (2 hours ago) • Jonathan Wong
- women's denim jac...png (4 days ago) • Jonathan Wong
- MBF statement of w...pdf (7 hours ago) • Jonathan Wong
- MBF corp design br...doc (7 months ago) • Jonathan Wong
- Store #223 new fac...png (7 months ago) • Jonathan Wong

Available to EAP customers

## Up next: Table view

A new grid experience that scales from simple to complex

- Quick load times for large sheets
- Faster formula calculations
- Continuous save & real-time updates



# Delete columns in table view

Available to EAP customers

Campaign Roadmap Help & feedback Share

Table | Filter | f x | @

Issue	Project Objective	Target Audience	Client Background	Key Message	USP	Brand Attributes	Deliverable #1	Deliverable #2	Deliverable #3	Deliverable #4	Deliverable #5	Initial Consultation	Strategy Development	Content Development
1	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	03/17/24	03/31/24	04/01/24
2	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	03/18/24	04/01/24	04/01/24
3	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	03/15/24	03/29/24	04/01/24
4	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	04/25/24	05/09/24	05/09/24
5	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	01/02/25	01/16/25	01/16/25
6	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	03/12/24	03/26/24	04/01/24
7	Increase brand awareness, drive website traffic, generate leads	Millennials aged 25-35, urban, tech-savvy	SaaS company, 5 years old, innovative productivity tools	Our tools help you work smarter, not harder	AI-powered features, intuitive design	Modern, efficient, user-friendly	Social media ads	Landing pages	Email nurture campaigns	Influencer collaborations	Retargeting ads	03/16/24	03/30/24	04/01/24

# Indenting/outdenting rows

Available to EAP customers

	Approval	Campaign ID	Campaign Name	Primary Hero	Description	Owner	Health	Brand	Start	Finish	Days to Lau...	Stakeholders	Sta
1	Approved	3M0094	Luxe Wanderlust 1a		This campaign invites affluent travelers to explore breathtaking destinations and luxurious experiences. Through stunning visuals and engaging storytelling, this campaign highlights exclusive accommodations, gourmet dining, and unique cultural adventures, inspiring viewers to embark on their next opulent getaway.	Tamika Marshall	▲	Sonata	08/22/24	12/24/24		Bruce Ferguson Everett Crosse Kai Senjima	
2	Under Review	3M0093	Luxe Wanderlust 2		Discover the world in unparalleled comfort and style with "Luxe Wanderlust," our exclusive campaign designed for the discerning traveler. Immerse yourself in a journey where opulence meets adventure, as we offer bespoke travel experiences that blend lavish accommodations, personalized itineraries, and exceptional service.	Tamika Marshall		Silver Creek	08/23/24	08/21/24		Bruce Ferguson Everett Crosse Kai Senjima	
3	On Hold	3M0063	Vertical Ascent		Inspire determination and skill as you embrace the challenge of reaching new heights. This campaign showcases the excitement of conquering obstacles and the satisfaction of achieving personal goals.	Harry Riggs	▲	Silver Creek	08/20/24	12/17/24		Brooklyn Jansen, Michael Loughrey	
4	Approved	3M0090	Hilltop Serenity		Find peace and tranquility as you take in stunning views from above. This campaign encourages reflection and appreciation for the beauty of nature and the journey of life.	Paul Finley	▲	Sonata	09/30/24	12/17/24	5	Brooklyn Jansen Melissa Brundi... Michael Lough...	
5	Approved	3M0014	Mountain Endurance		Celebrate the spirit of perseverance and physical achievement in stunning natural settings. This campaign highlights the thrill of pushing boundaries and embracing an active lifestyle.	Tamika Marshall	—	Silver Creek	06/09/25	10/02/25	257	Bruce Ferguson, Melissa Brundige, Michael Loughrey	
6	Under Review	3M0012	Convertible Escapade		Feel the wind in your hair as you embark on a carefree road trip. This campaign celebrates the joy of spontaneity and the thrill of exploring new horizons with friends.	Bruce Ferguson	—	Sonata	08/17/24	12/11/24		Brooklyn Jansen, Melissa Brundige, Michael Loughrey	







# Filter and find in table view

Available to EAP customers

**Campaign Roadmap** [Help & feedback](#) [Share](#)

Table [Filter](#) [fx](#) [🗨](#) [📄](#)

Saved filters [+](#) Add a filter No filters applied [^](#)

	Approval	Campaign ID	Campaign Name	Primary Hero	Description	Owner	Health	Brand	Start	Finish	Days to Lau...	Stakeholders	Sta
					you-to-find-peace-and-rejuvenation-in-the-great-outdoors:	n					<a href="#">fx</a>	<a href="#">ML</a> Michael Lough...	
11	<b>Declined</b>	3M0017	Winter-Wonderland		Embrace the enchanting beauty of winter landscapes, where every step reveals a magical world. This campaign captures the essence of shared moments in a picturesque setting filled with wonder.	<a href="#">TM</a> Tamika Marshall		Silver Creek	09/29/24	11/20/24	4	<a href="#">MB</a> Melissa Brundi... <a href="#">ML</a> Michael Lough...	
12	<b>Approved</b>	3M0013	Trail Blazers		Dive into the thrill of exploration and adventure, where every twist and turn leads to new discoveries. This campaign emphasizes the joy of outdoor activities and the excitement of the journey.	<a href="#">GG</a> Guadalupe Garcia	-	Silver Creek	10/02/24	12/31/24	7	<a href="#">BJ</a> Brooklyn Jansen <a href="#">BF</a> Bruce Ferguson <a href="#">ML</a> Michael Lough...	
13	<b>On Hold</b>	3M0008	Pedal Through Paradise		Embark on an unforgettable journey filled with breathtaking landscapes and shared moments of joy. Experience the thrill of exploration while creating lasting memories together.	<a href="#">HS</a> Harley Sterling		Sonata	10/01/24	09/25/24	6	<a href="#">BJ</a> Brooklyn Jansen <a href="#">MB</a> Melissa Brundi... <a href="#">ML</a> Michael Lough...	
14	<b>On Hold</b>	3M0003	Trailblazers		Venture into the great outdoors and immerse yourself in nature's beauty. This campaign inspires wanderlust and encourages exploration of hidden trails and scenic paths.	<a href="#">BF</a> Bruce Ferguson	-	Sonata	01/10/25	12/16/24	107	Brooklyn Jansen, Melissa Brundige, Michael Loughrey	
15	<b>Under Review</b>	3M0015	Desert Dreams		Discover the allure of the open road as you traverse stunning desert vistas. This campaign invites you to embrace the spirit of adventure and the freedom of travel.	<a href="#">HS</a> Harley Sterling	-	Sonata	10/03/24	12/02/24	8	<a href="#">AB</a> Aaron Baker <a href="#">BJ</a> Brooklyn Jansen <a href="#">BF</a> Bruce Ferguson <a href="#">ML</a> Michael Lough...	
16	<b>Approved</b>	3M0022	Conquer the Summit		Celebrate the exhilarating journey of overcoming challenges and achieving personal milestones in breathtaking landscapes. This campaign inspires adventurers to embrace their inner strength and strive for greatness.	<a href="#">TM</a> Tamika Marshall	▲	Silver Creek	10/10/24	01/15/25	15	<a href="#">BJ</a> Brooklyn Jansen <a href="#">BF</a> Bruce Ferguson <a href="#">ML</a> Michael Lough...	
17	<b>Approved</b>	3M0004	Pristine Solitude		Discover the beauty of untouched wilderness and the simplicity of nature. This campaign evokes feelings of peace and solitude, inviting you to escape the hustle and bustle of everyday life.	<a href="#">GG</a> Guadalupe Garcia	-	Silver Creek	10/27/24	02/19/25	32	Bruce Ferguson, Melissa Brundige, Michael Loughrey	



# Learning Objectives



**Identify optimal  
uses for timeline  
view**



**Customize, use,  
and share  
timeline view**



**Be ready to use  
table view after  
release**

# Next steps...

- Check out the SEA30 Intro Session: Supporting agile work, prioritization and content planning with board view
- Sign up for EAP to try table view and more

Visit the New Views Booth and the Community Booth

## 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!**

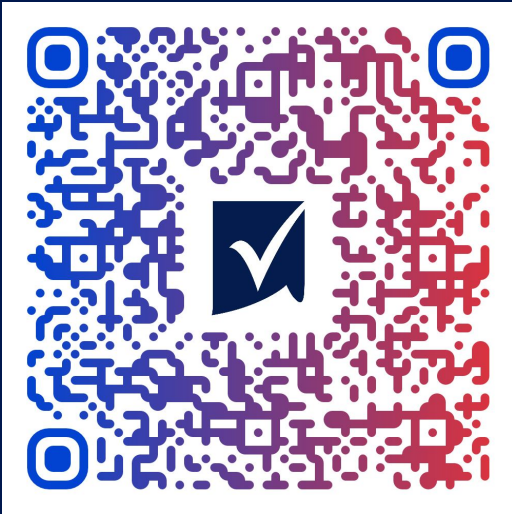
# Thank you.

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# ENGAGE

# Tell us: What view are you?

Share your answer on the Community Platform & Claim your badge



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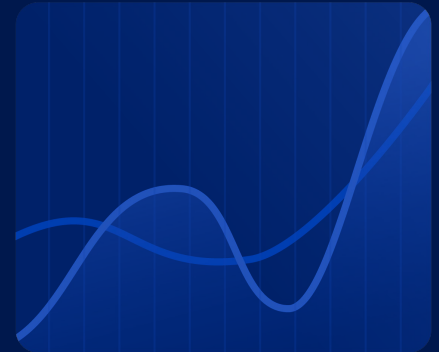
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**Thank you!**

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