



ENGAGE

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# Intake to archive

The anatomy of a complete solution

v.07/16

 smartsheet  
ENGAGE



Cicero



# Learning Objectives

Be able to look at a solution with a wider lens

Be able to describe the full workflow of a solution

Be able to identify the components in a solution

# Table of contents

**1**

Thinking about the solution

**2**

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## How we think about solutions

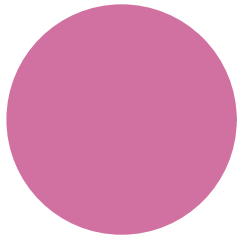
 smartsheet  
ENGAGE

**We have a problem  
with our project  
intake process**

**We don't have one**

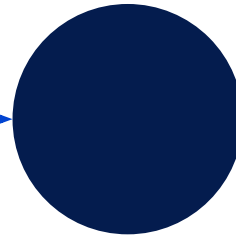


# All solutions begin the same



Where it usually starts

Start fresh  
Start from a template  
Start by importing

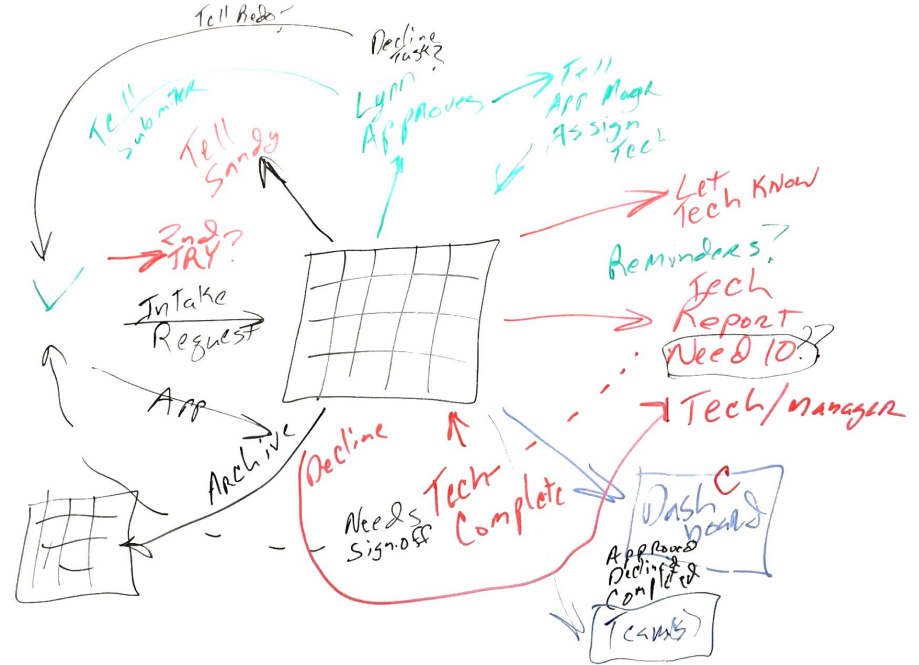


Where it should start

Start by **whiteboarding!**

# What are we trying to solve?

1. Multiple ways to submit projects
2. No consolidation of work tracking
3. Management is out of the loop
4. Assignments are unclear
5. No view of completed projects
6. Impossible to track request status

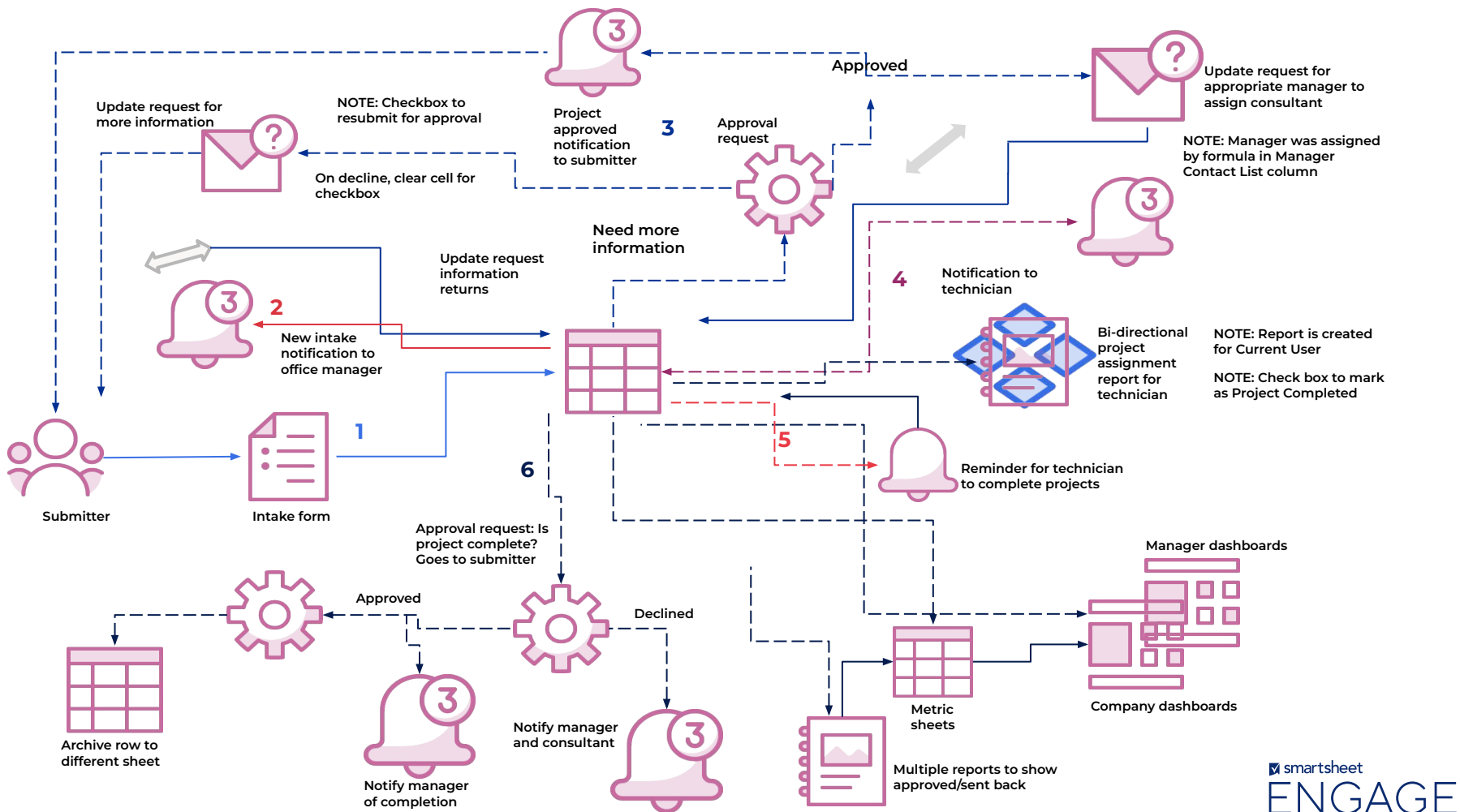


**Let's clean it up and break it down**



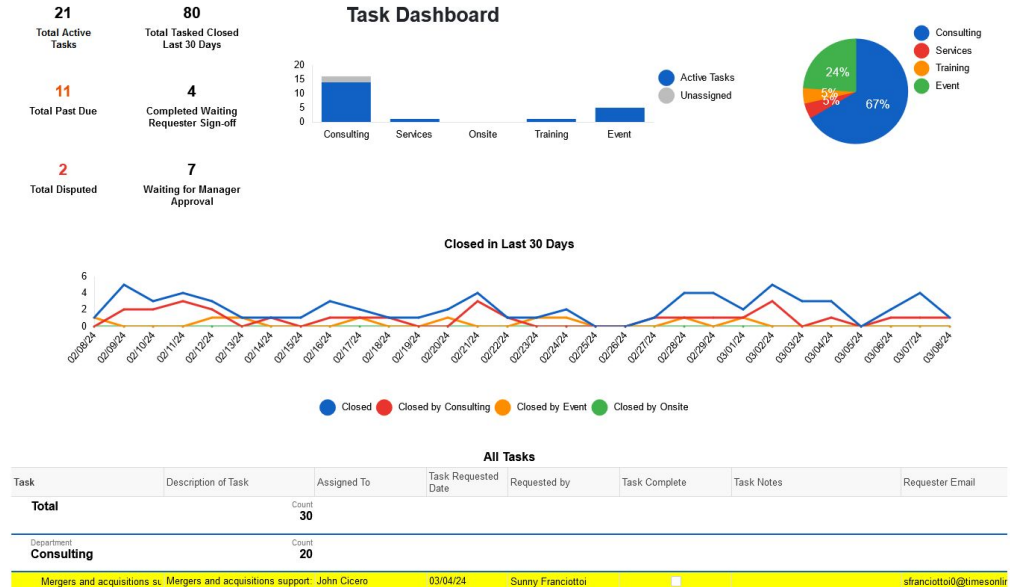
# What do we need to do?

1. Create a single source of intake
2. Notify office manager
3. Get approval
4. Notify assignee
5. Reminder to complete work
6. Get submitter sign-off
7. Create visibility using dashboards



# What do you need on the dashboard?

- Meet with the people who will be using the dashboard
- Gather their requirements and draw them in a tentative layout
- Highlight things that aren't captured in the data and need to be created



#### Closed in Last 30 Days

Line chart showing task closure trends over time from 03/06/24 to 03/09/24. Legend: Closed (blue), Closed by Consulting (red), Closed by Event (orange), Closed by Onsite (green).

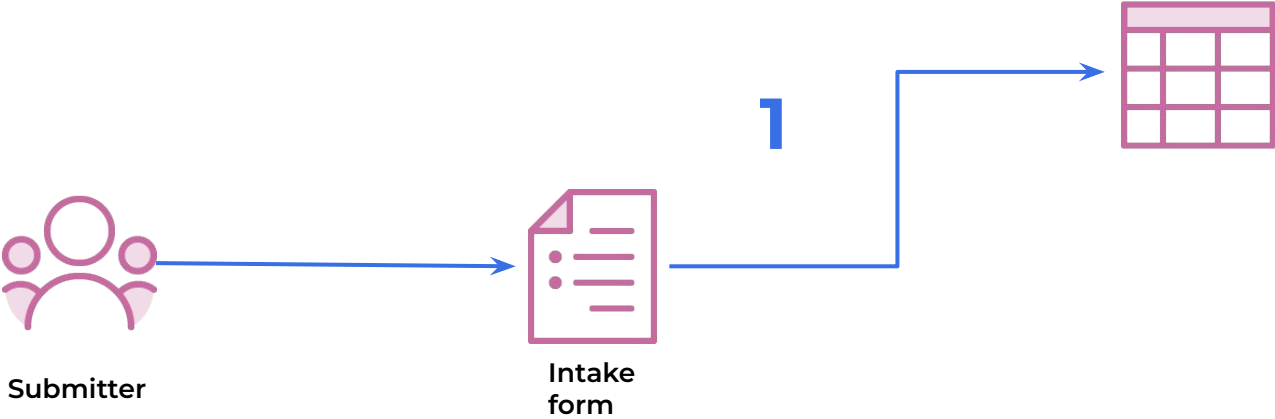
#### All Tasks

Task	Description of Task	Assigned To	Task Requested Date	Requested by	Task Complete	Task Notes	Requester Email
<b>Total</b>		Count	<b>30</b>				
Department	<b>Consulting</b>	Count	<b>20</b>				
Mergers and acquisitions su. Mergers and acquisitions support. John Cicero 03/04/24 Sunny Franciotta sfanciotta0@timesonli							

2

## Breaking down the parts

# 1. Create a single source of intake





# Assigning the correct manager

Created By	Manager	Department	Task Requested Date	Resubmit for Approval	Approval Status	A	D
ohn.cicero@demo.mbf	Guadalupe Garcia	Consulting	05/28/24	<input type="checkbox"/>	Approved	0	
ohn.cicero@demo.mbf	Bruce Ferguson	Services	05/28/24	<input type="checkbox"/>	Approved	0	

`=INDEX((Sheet - Metrics Managers), MATCH(Department@row, (Sheet - Metrics Departments), 0), 1)`

Edit reference: [\(Sheet - Metrics Managers\)](#)  
[\(Sheet - Metrics Departments\)](#)

## “Department”

is the list shown on form as type of request

## “Manager”

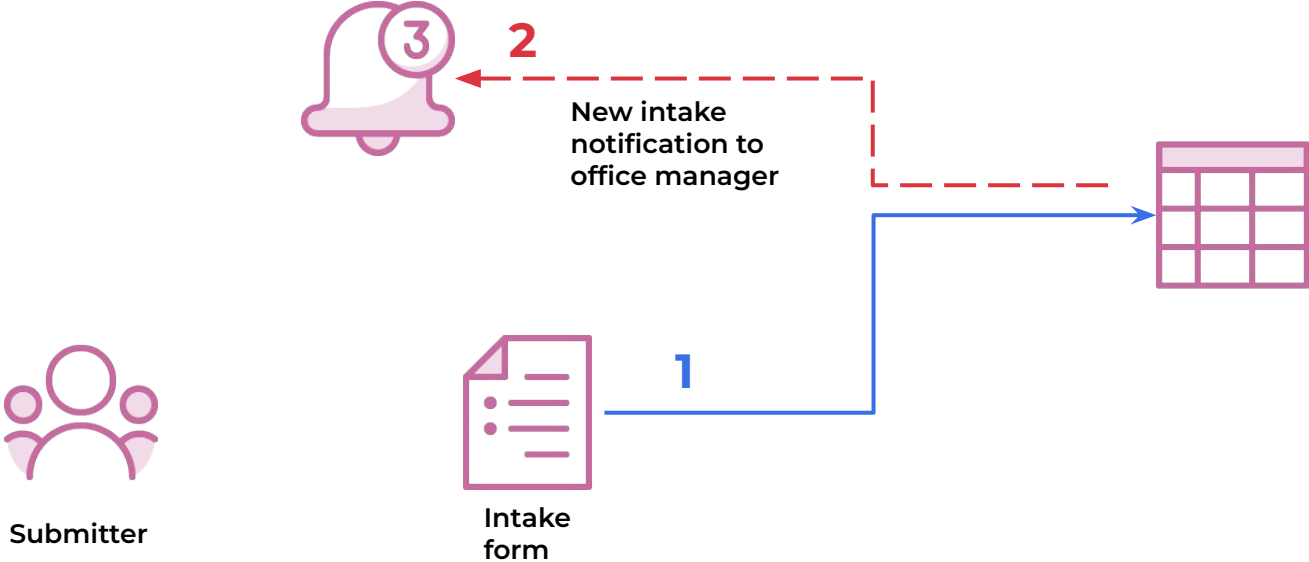
is a contact list column

The comparison chart is on another sheet

Use INDEX and MATCH functions to assign the correct manager

 Guadalupe Garcia	Consulting
 Barbara Spinelli	Event
 Jim Radford	Onsite
 Serena Nadal	Training
 Bruce Ferguson	Services

# 2. Notify office manager



## #2 Notification of New Requests

Trigger: + When rows are added ▾

When *Any field* ▾ changes

🕒 Run workflow: Daily ▾

▾ Add a condition to filter rows

🔔 Alert someone ⋮

➡ Send to specific people ▾

Cicero .

Customize message ✕

Send from Smartsheet Automation ▾

Smartsheet Automation ⓘ

New Requests Submitted

To automatically include relevant sheet content in the subject and body, surround a field name in double curly brackets. For example: {{Task ID}}

Message includes:

Links to sheet and all fields

Links to sheet and specific fields

Description of Task Task Requested Date

Requested by Task Name

Message only

# Alert someone

Trigger:  
New row added

Condition:  
When *Any field* changes

Action:  
Alert someone – office manager

Once daily

Send From: Smartsheet Automation

# Reply-To email address

From name option selected	From name notification email	Reply-To email address
Send from Smartsheet Automation	<b>From name</b> is Smartsheet Automation.	Sheet owner's email address
Send from organization name	<b>From name</b> is your organization's name set by your System Admin.	Sheet owner's email address
Send from triggering user (for Alerts)	If an alert is triggered by a single user's change(s) in your sheet, that triggering user's name is the <b>From name</b> for the notification email.	The reply to is the triggering user's email address
Send from triggering user (for Alerts)	If an alert is triggered by multiple users' changes in your sheet or if the alert is time-based, i.e., a reminder, then the sheet owner's name is the <b>From name</b> for the notification email.	The reply to is the sheet owner's email address
Send from sheet owner (for Update and Approval Requests)	<b>From name</b> is the sheet owner's name.	Sheet owner's email address

<https://help.smartsheet.com/articles/2479256-customize-the-content-of-your-alerts-and-requests>

# Testing your workflows

## Saved Workflows

Filter by all

Sort by name



Popular

### #2 Notification of New Requests

Trigger: When rows are added

Actions: Alert someone

Recipients: Cicero .

Last modified by Cicero . on Mar 8, 2024, 9:46 AM

### #3 New Task Approval

Trigger: When rows are added or changed AND when 'Submitted Date' changes to Any Value, or when 'Resubmit for Approval' changes to 'Checked'

Actions: Alert someone, Request an update, Request an approval, Clear a cell

Recipients: Contacts in 'Manager', Contacts in 'Requester Email'

Last ran on Mar 8, 2024, 10:45 AM • Last modified by Cicero . on Mar 8, 2024, 10:04 AM



Deactivate

Run now...

Edit

Duplicate

Unsubscribe

Delete

Properties...

## Run workflow now



Manually trigger the workflow **#3 New Task Approval**.

Actions: Alert someone, Request an update, Request an approval, Clear a cell

Trigger workflow on the entire sheet

Trigger workflow on specific rows

Example: 1-5, 8, 11-13

Recipients: ~~Contacts in 'Manager', Contacts in 'Requester Email'~~

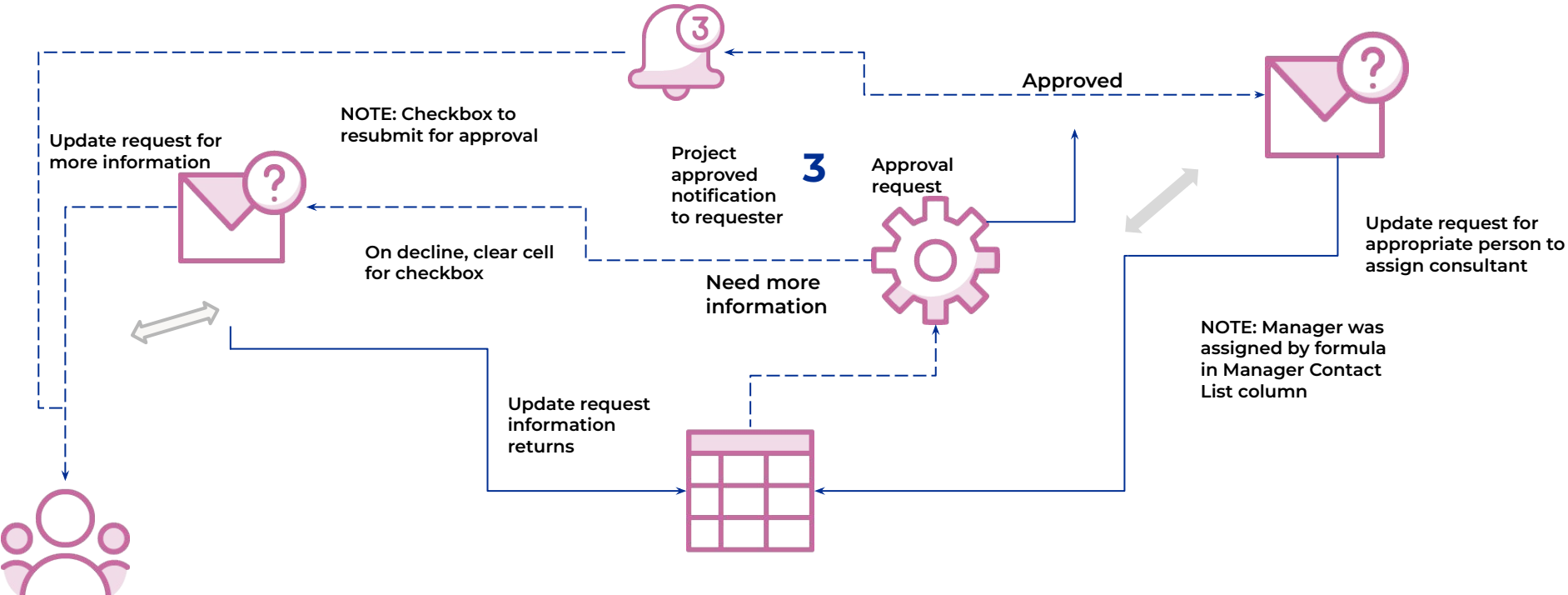
Send notifications to myself instead

**i** Running a workflow will ignore triggers but respect condition blocks. Scheduled workflows will continue to run as normal. This action may produce duplicate results depending on triggers in related workflows. [Learn more](#)

Close

Run workflow

# 3. Get approval



### #3 New Task Approval

Trigger: When rows are added or changed

When Submitted Date changes to:

or when Resubmit for Approval changes to:

[+ Specify another change](#)

Run workflow: When triggered

[Add a condition to filter rows](#)

Request an approval

Send to contacts in a cell

Some recipients may not get notified. [Change your permission settings.](#)

Save response in:

Customize message

Send from Smartsheet Automation

# Approval request

## Trigger:

New row or change in row  
**“Resubmit” is also a trigger**

## Condition:

Submitted Date is *Any Value* - System Column (Date Created)

## Action:

Approval request

## Approve

Update request to appropriate manager for task assignment.  
Alert to submitter of approval.  
*Can record a date if desired.*

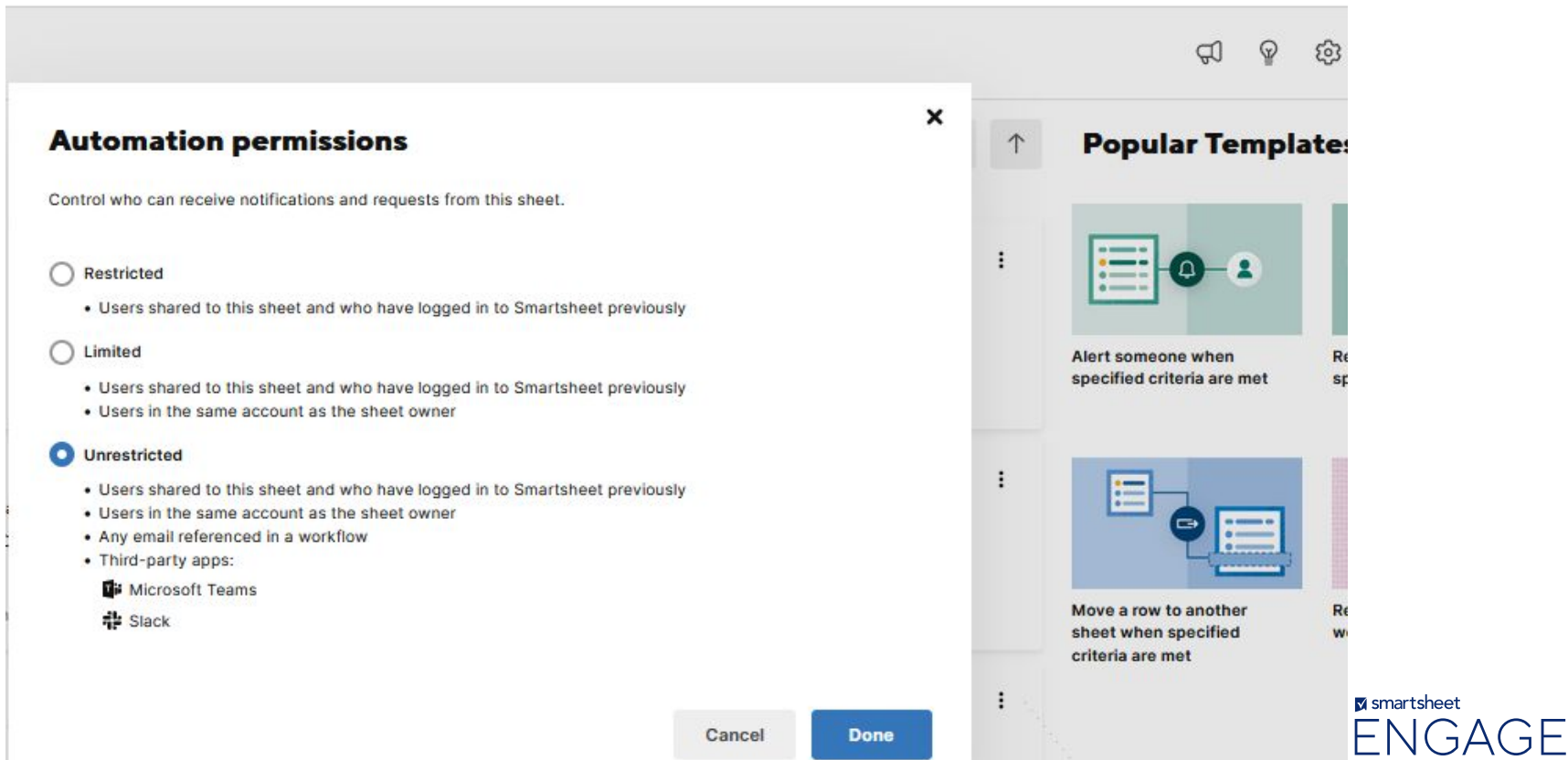
## Decline

Update request to submitter email (contact list column) to modify information and check resubmit.  
Clear cell to restart the approval.

## Start approval again

**NOTE:** This means you need a checkbox column for resubmit.



# Automation message



The image shows a screenshot of the Smartsheet interface. On the left, a modal window titled "Automation permissions" is open. It contains three radio button options: "Restricted", "Limited", and "Unrestricted". The "Unrestricted" option is selected. Below the "Unrestricted" option, there are three bullet points: "Users shared to this sheet and who have logged in to Smartsheet previously", "Users in the same account as the sheet owner", and "Third-party apps:". Under "Third-party apps:", there are two icons with labels: "Microsoft Teams" and "Slack". At the bottom of the modal are "Cancel" and "Done" buttons. On the right, the main interface shows a "Popular Templates" section with two template cards. The first card is titled "Alert someone when specified criteria are met" and features a green icon with a bell and a person. The second card is titled "Move a row to another sheet when specified criteria are met" and features a blue icon with a document and an arrow. In the bottom right corner, there is a "smartsheet ENGAGE" logo.

## Automation permissions

Control who can receive notifications and requests from this sheet.

- Restricted
  - Users shared to this sheet and who have logged in to Smartsheet previously
- Limited
  - Users shared to this sheet and who have logged in to Smartsheet previously
  - Users in the same account as the sheet owner
- Unrestricted
  - Users shared to this sheet and who have logged in to Smartsheet previously
  - Users in the same account as the sheet owner
  - Any email referenced in a workflow
  - Third-party apps:
    -  Microsoft Teams
    -  Slack

Cancel Done

## Popular Templates

Alert someone when specified criteria are met

Move a row to another sheet when specified criteria are met

smartsheet  
ENGAGE



# Approval request

## Approve

Update request to appropriate manager for task assignment.  
Alert to submitter of approval.

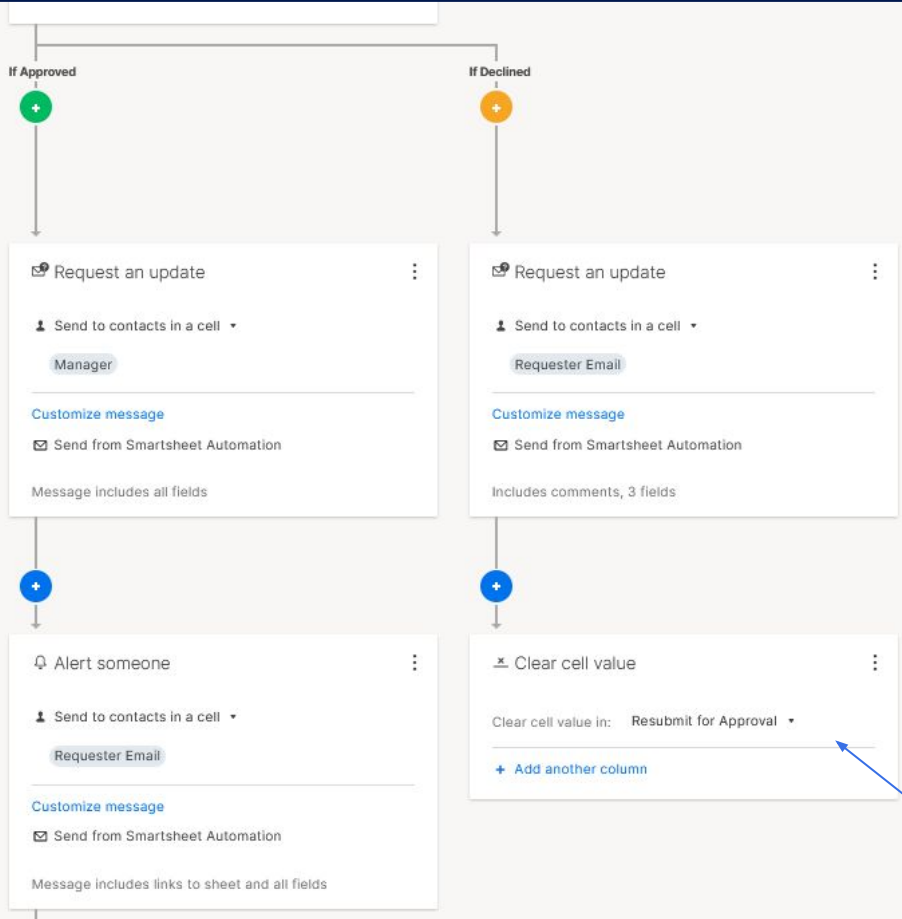
Can record a date if desired.

## Decline

Update request to submitter email (contact list column) to modify information and check resubmit.

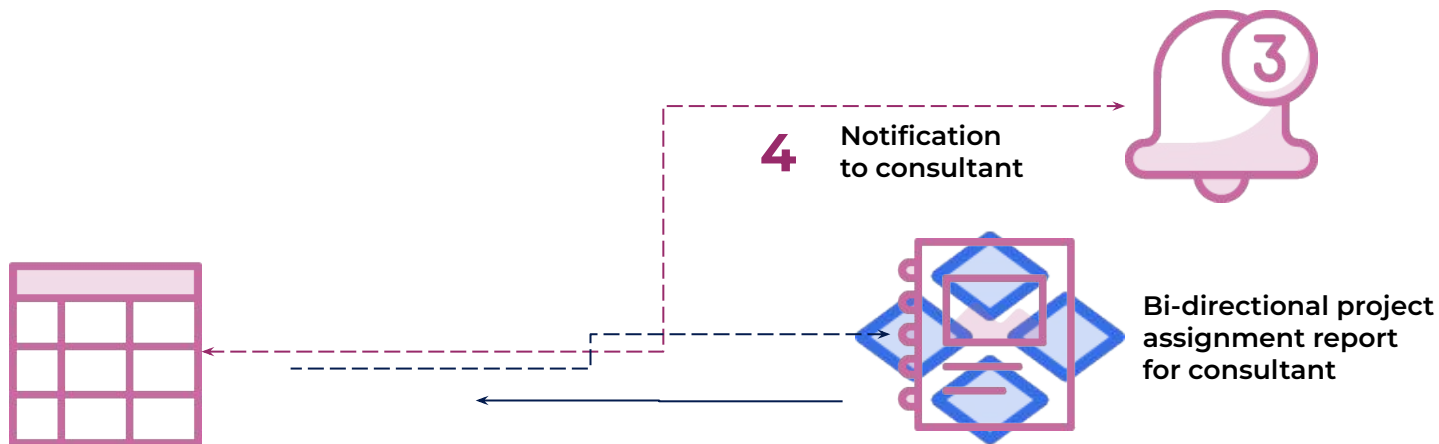
Clear cell to restart the approval.

## Start approval again



**NOTE:** Clears **Resubmit for Approval** to allow another chance

## 4. Notify assignee



NOTE: Checkbox to mark as project completed

NOTE: Report is created for current user

## #4 New Tasks Assigned

Trigger: When rows are changed ▾

When Assigned To ▾ changes to:

+ Specify another change

⌚ Run workflow: When triggered ▾

---

⌵ Add a condition to filter rows

⌵

🔔 Alert someone ⋮

👤 Send to contacts in a cell ▾

---

Customize message ✕

🏢 Send from my organization ▾

via Smartsheet ⓘ

Please to to your WorkApp and see you new tasks.  
<https://workapps.smartsheet.eu/app/fJFF3w977Xr26p95wW3p6GQHv8>

Message includes:

Links to sheet and all fields

Links to sheet and specific fields

Message only

# Alert someone

Trigger:  
Change in row

Condition:  
Assigned to is *Any value*  
Assigned to is a contact list column

Action:  
Alert Someone  
The assigned consultant on that row

NOTE: In the body of the message we have provided a link to the WorkApp for the technician's tasks.



## Intake to Archive Task...

View as

Consultants

Open Tasks

Waiting Requestor Approval

Overdue Tasks

Task Dashboard

## Overdue Tasks



📄 🖨️ ↶️ ↷️ | 🔄 | ✎️ | ⬆️ ⬆️ Sort

	Task	Description of Task	Assigned To	Task Requested Date	Requested by	Task Complete
1	Mergers and acquisitions su	Mergers and acquisitions supp	John Cicero	03/04/24	Sunny Franciottoi	<input type="checkbox"/>
2	Strategic planning and recor	Strategic planning and recomr	John Cicero	03/04/24	Dotty Leftley	<input type="checkbox"/>
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Task	Description of Task	As
Interim management provision	Interim management provision: C	JC
Mergers and acquisitions sup	Mergers and acquisitions suppor	JC
Project management support	Project management support: Cc	JC

**Assigned To** ▼ has any of ▼

**Task Compl...** ▼ is unchecked

**Task Reques...** ▼ is in the future

+ Add a Condition

+ New

1 Selected

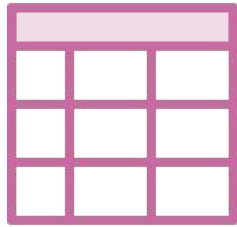
- Blank
- Current User
- Serena Nadal (12)
- John Cicero (9)
- Lori Grimes (9)

Current User

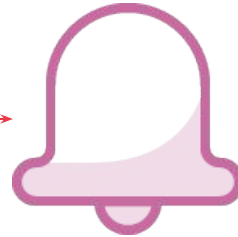
And

Canc

## 5. Incomplete work reminder



5



Reminder for consultant  
to complete tasks

## #5 Remind to Finish

Trigger: When a date is reached ▾

Run once ▾ 1 day before ▾

04/04/24

Date field Task Requested Date ▾

---

8:00 AM ▾

US/Pacific (GMT-8)



Conditions (2) ^ ▸

Where Task Complete ▾ is not checked ▾

or where Requester Sign-off ▾ is one of ▾

Declined

+ Add another condition



Alert someone ▸

Send to contacts in a cell ▾

Assigned To Manager

---

Customize message

Send from Smartsheet Automation

# Reminder

Trigger:

1 day before the Task Requested Date

This could be date requested or whatever you like

Condition:

Task Complete is not checked, or Requester Sign-off is marked as Declined

Action:

Alert someone

Assigned Tech and Manager

## #5 Task Reminder

Trigger: When a date is reached ▾

Every day starting on 03/08/24 ▾

🕒 8:00 AM ▾

US/Pacific (GMT-8)



∨ Conditions (2) ^ ⋮

Where Task Complete ▾ is not checked ▾

or where Requester Sign-off ▾ is one of ▾

Declined

+ Add another condition



∨ Conditions (1) ^ ⋮

Where Task Requested Date ▾

is in the next (days) ▾

3

+ Add another condition

# Reminder 3x

Trigger:  
Fixed Date  
Set time

Condition 1:  
Task Complete is not checked, or Submitter Sign-off  
is marked as Declined

Condition 2:  
Task Requested Date is in the next three days

Action:  
Alert someone  
Assigned Tech and Manager

NOTE: Both Condition Blocks have to be  
"True" to have the reminder Action happen



# Manager task overdue report



File Dynamic View

## Manager Overdue Task Report ☆

1 Sheet 8 Columns 3 Filters 1 Group Summarize Sort

Task	Description of Task	Assigned To
Assigned To JC John Cicero		
1	Mergers and acquisitions	Mergers and acquisitions supp JC John Cicero
Assigned To LG Lori Grimes		
2	Regulatory compliance as	Regulatory compliance assista LG Lori Grimes
3	Regulatory compliance as	Regulatory compliance assista LG Lori Grimes
4	Industry-specific expertise	Industry-specific expertise: The LG Lori Grimes
Assigned To SN Serena Nadal		
5	Stakeholder presentation	Stakeholder presentation deliv SN Serena Nadal
6	Coaching and mentorship	Coaching and mentorship: The SN Serena Nadal
7	Project management sup	Project management support: ( SN Serena Nadal
8	Industry-specific expertise	Industry-specific expertise: The SN Serena Nadal

Task Compl... is unchecked

Task Reques... is in the past

Manager has any of

+ Add a Condition

+ New

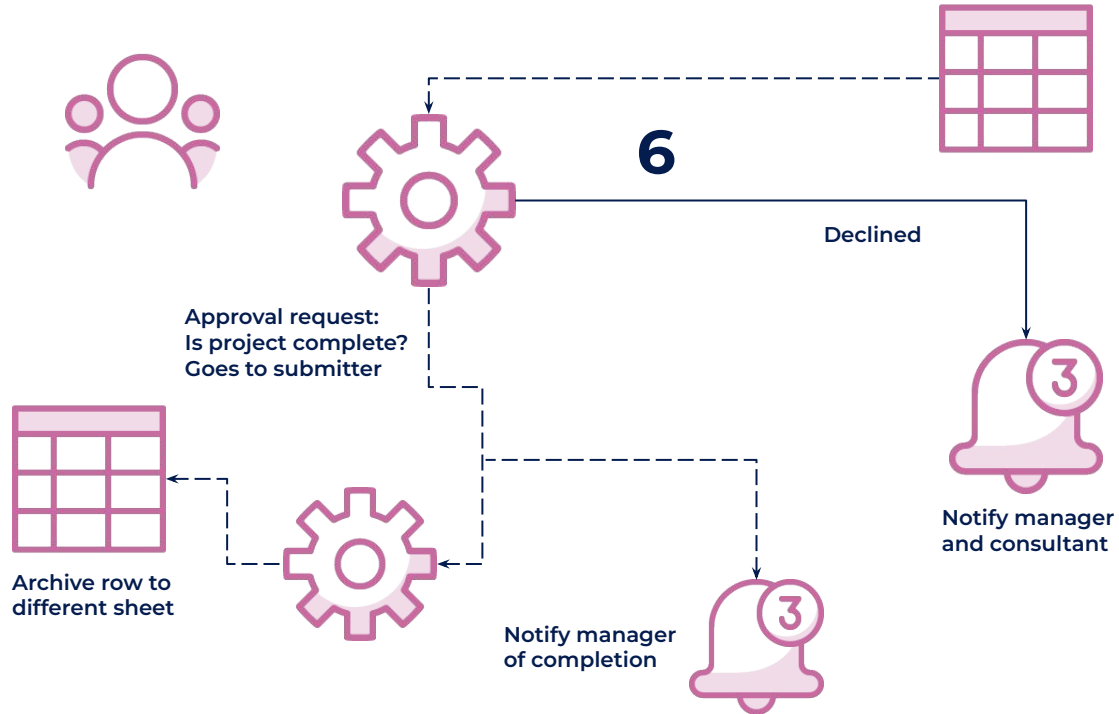
- 1 Selected
- Blank
- Current User
- Guadalupe Garcia (30)

Current User

And

Car

## 6. Get requester sign-off



## #6 Requester sign-off

Trigger: When rows are changed ▾

When Task Complete ▾ changes to:

Checked

+ Specify another change

Run workflow: When triggered ▾

▼ Add a condition to filter rows

Request an approval ⋮

Send to contacts in a cell ▾

Requester Email

Save response in: Requester Sign-off ▾

Customize message ✕

Send from my organization ▾

MBF Corp via Smartsheet ⓘ

Task marked as Complete

To automatically include relevant sheet content in the subject and body, surround a field name in double curly brackets. For example: {{Task ID}}

Message includes:

All fields

Specific fields

Task Name Description of Task

Task Requested Date Task Notes

# Submitter sign-off (approval request)

Trigger:  
When a row is changed

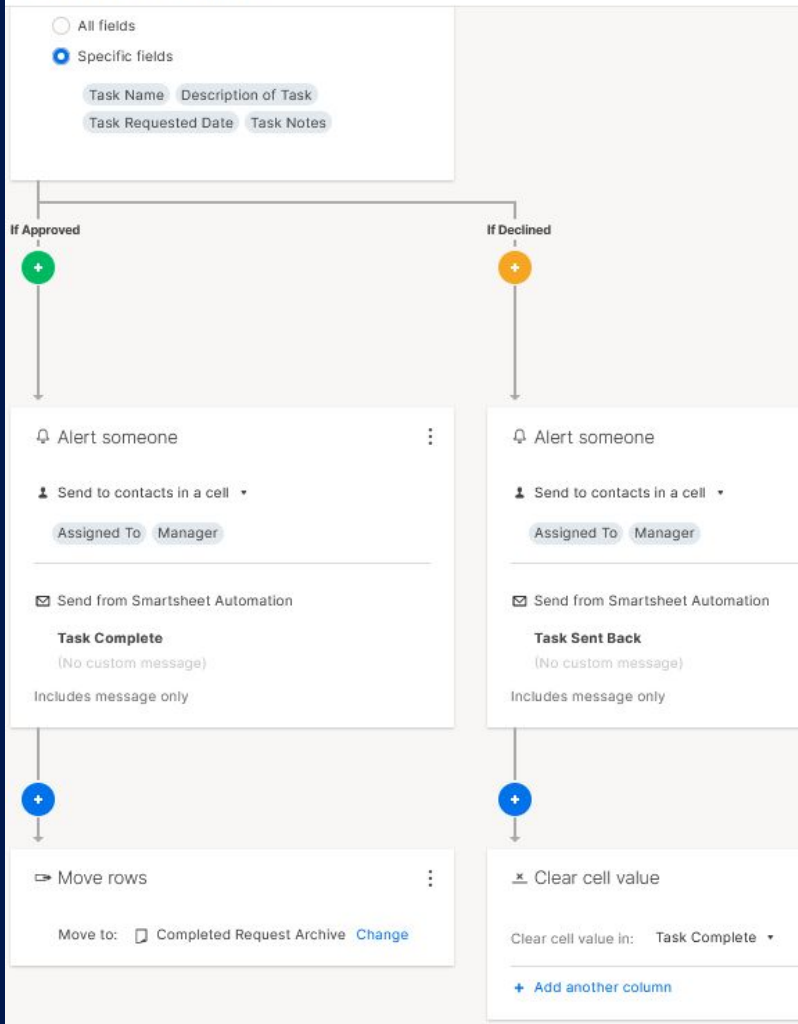
Condition:  
Task Complete is checked

Action:  
Approval request

Approve  
Alert to manager, consultant  
Move row to Completed Request Archive sheet

Decline  
Alert someone, manager, consultant  
Task does not archive and **Task Complete is unchecked**

## #6 Requester sign-off



# Requester sign-off (approval request)

Trigger:  
When a row is changed

Condition:  
Task Complete is checked

Action:  
Approval request

Approve  
Alert to manager, consultant  
Move row to Task Archive sheet

Decline  
Alert someone, manager, consultant  
Task does not archive and **Task Complete is unchecked**

### Saved Workflows

Filter by all ▾

- All
- Active
- Inactive
- Unable to run

Sort by name ▾



- #2 Notification to Office**  
Trigger: When rows are added  
Actions: Alert someone  
Recipients: Cicero .  
● Active • Last modified by Cicero . on Feb 17, 2022, 11:11 AM
- #3 New Task Approval**  
Trigger: When rows are added or changed AND when 'date created' changes to Any Value, o...  
Actions: Alert someone, Request an update, Request an approval, Clear a cell  
Recipients: Contacts in 'Manager', Contacts in 'Submitter Email'  
● Active • Last modified by Cicero . on Aug 11, 2021, 9:31 AM
- #4 New Task for Tech**  
Trigger: When rows are changed AND when 'Assigned Tech' changes to Any Value  
Actions: Alert someone  
Recipients: Contacts in 'Assigned Tech'  
● Active • Last modified by Cicero . on Oct 25, 2021, 10:44 AM
- #5 Remind to Finish**  
Trigger: 1 day before a date on 'Requested Date' at 8:00 AM  
Actions: Alert someone  
Recipients: Contacts in 'Assigned Tech', Contacts in 'Manager'  
● Active • Last modified by Cicero . on Jan 4, 2021, 12:55 PM
- #6 Submitter Sign-off**  
Trigger: When rows are changed AND when 'Task Complete' changes to 'Checked'  
Actions: Alert someone, Request an approval, Move a row, Clear a cell

### Featured Templates



Alert someone when specified criteria are met



Remind someone on a specific date

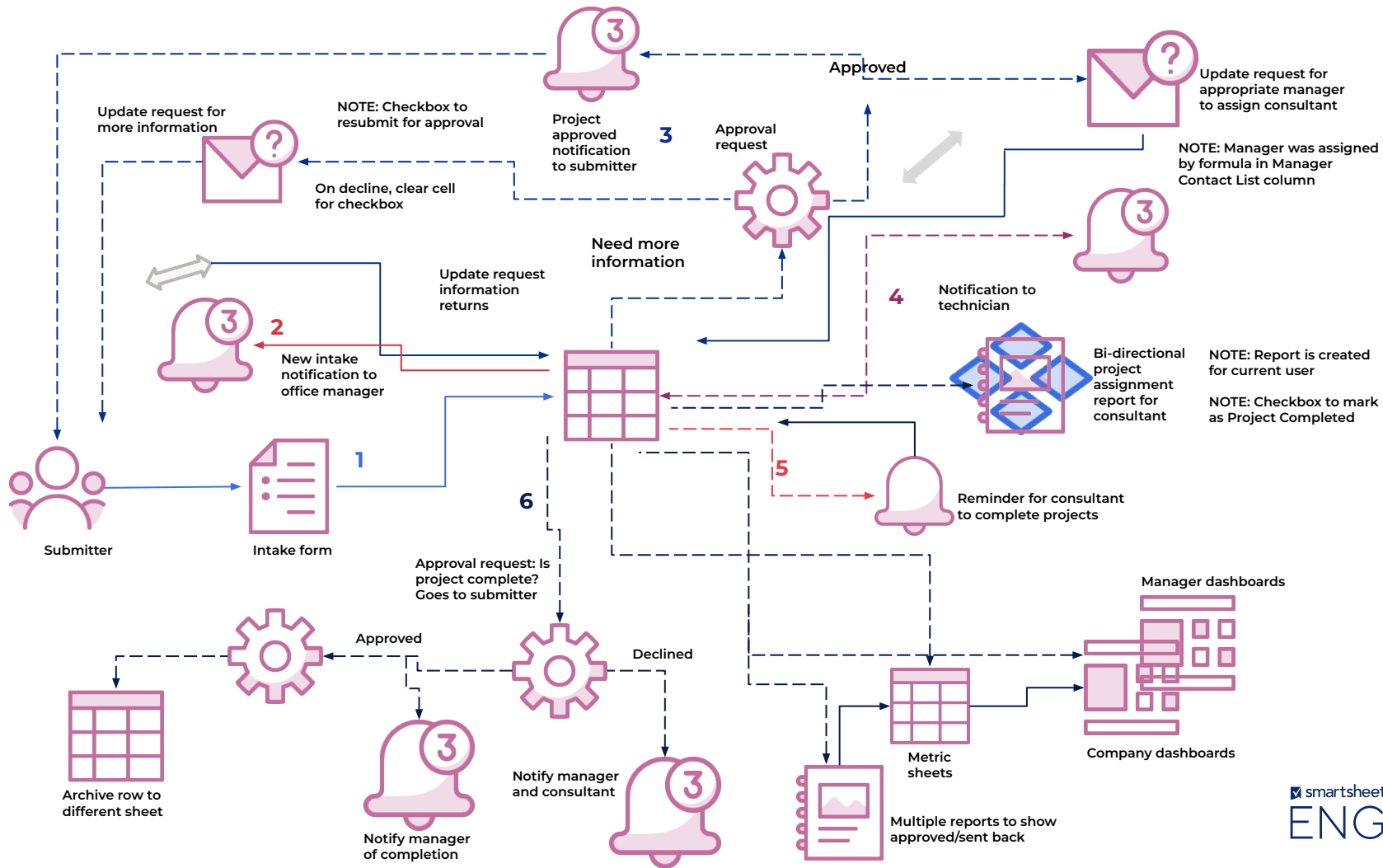


Request an update every week



Move a row to another sheet when specified criteria are met

See more templates



# Metrics sheets to aggregate data

n Forms Connections Dynamic View

Sheet - Metrics ☆

Grid View Filter Arial 10 B I U

Label	Metric 1	Metric 2	Metric 3	Departments	Metric 4
<b>Projects by Department</b> Waiting Approvals	Count				
Consulting		5			
Services		0			
Onsite		0			
Training		2			
Event		0			
<b>Department</b>	<b>Active Tasks</b>	<b>Unassigned</b>	<b>Completed Waiting Sign-off</b>	<b>Disputed</b>	<b>Overdue</b>
Consulting	16	14	3	2	9
Services	0	0	0	0	0
Onsite	0	0	0	0	0
Training	1	1	0	0	0
Event	6	5	0	1	2
<b>Consultant Assignments</b>	<b>Assigned Tasks</b>	<b># Disputed</b>			
Kirk Caskey	3	1			
Brent Williams	3	0			
Carlos Soltero	0	0			
Alexandra Mattson	3	0			
John Cicero	4	0			
Lori Grimes	4	0			
Serena Nadal	7	2			
Henry McNeal	0	0			
Jane Evans	0	0			

## Sheet Summary ? x

Total Active Tasks *fx*

23

Total Tasked Closed Last 30 Days *fx*

=COUNTIF((Date closed), @cell > TODAY(-30))

Total Past Due *fx*

11

Total Disputed *fx*

3

Waiting for Manager Approval *fx*

7

Completed Waiting Requester Sign-off *fx*

3

# Metrics sheets formulas

Note: All cross-sheet formulas are looking at the Intake Sheet

Projects by Department Waiting Approvals	Count
Consulting	4
Services	0
Onsite	
Training	

**fx** =COUNT(COLLECT({Department}, {Manager Approval}, "Submitted", {Department}, Label@row))

Edit reference: {Department}

{Manager Approval}

Cross-sheet references are named for the column they are looking at

Department	Active Tasks	Unassigned	Completed Waiting Sign-off	Disputed
Consulting	14	2	4	
Services	1	0	0	
Onsite				
Training				
Event				

**fx** =COUNT(COLLECT({Assigned to}, {Manager Approval}, "Approved", {Department}, Label@row))

Edit reference: {Assigned to}

{Manager Approval}

{Department}

Assigned to in this case will only count ones that have a value in the cell so unassigned will not be counted as Active

Department	Active Tasks	Unassigned	Completed Waiting Sign-off	Disputed	Overdue
Consulting	14	2	4	2	9
Services	1	0	0	0	0
Onsite					
Training					
Event					

**fx** =COUNT(COLLECT({Department}, {Manager Approval}, "Approved", {Department}, Label@row, {Assigned to}, ISBLANK(@cell)))

Edit reference: {Department}

{Manager Approval}

{Assigned to}

Using the ISBLANK to find the blank Assigned to cells.



# Metrics sheets formulas

Tasks	Unassigned	Completed Waiting Sign-off	Disputed	Overdue
14	2	4	2	9

**fx** =COUNT(COLLECT({Department}, {Department}, Label@row, {Requester Signoff}, "Submitted"))

Edit reference: {Department}

{Requester Signoff}

Note: All cross-sheet formulas are looking at the Intake Sheet

If it has Submitted in the Requester Signoff it means that Task Complete has been checked so this doesn't need to be part of the formula

Tasks	Unassigned	Completed Waiting Sign-off	Disputed	Overdue
14	2	4	2	9

**fx** =COUNT(COLLECT({Department}, {Department}, Label@row, {Requester Signoff}, "Declined"))

Edit reference: {Department}

{Requester Signoff}

Looking for only those for each department that are marked as Declined by the Requester

Department	Active Tasks	Unassigned	Completed Waiting Sign-off	Disputed	Overdue
Consulting		14	2	4	2

**fx** =COUNT(COLLECT({Department}, {Department}, Label@row, {Manager Approval}, "Approved", {Requested Date}, @cell < TODAY()))

Edit reference: {Department}

{Manager Approval}

{Requested Date}

Using @cell<TODAY() which will update each day and will update the metrics and charts on the dashboards

# Create visibility using dashboards

**21**  
Total Active Tasks

**11**  
Total Past Due

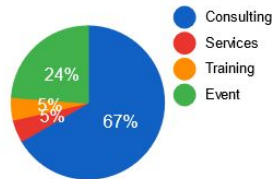
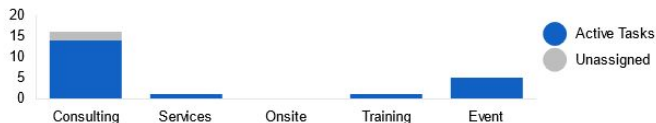
**2**  
Total Disputed

**80**  
Total Tasked Closed Last 30 Days

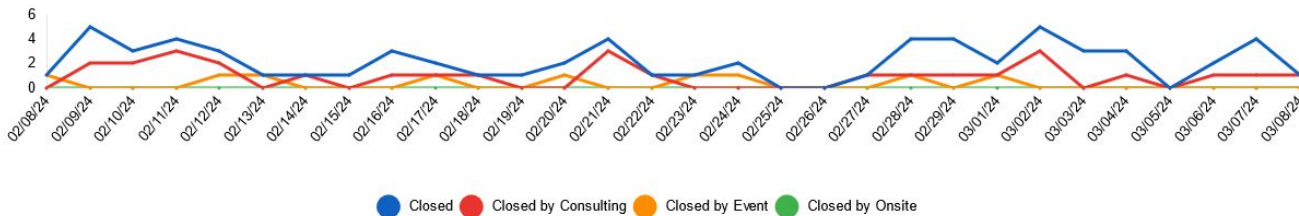
**4**  
Completed Waiting Requester Sign-off

**7**  
Waiting for Manager Approval

## Task Dashboard



## Closed in Last 30 Days



## All Tasks











Task	Description of Task	Assigned To	Task Requested Date	Requested by	Task Complete	Task Notes	Requester Email
------	---------------------	-------------	---------------------	--------------	---------------	------------	-----------------

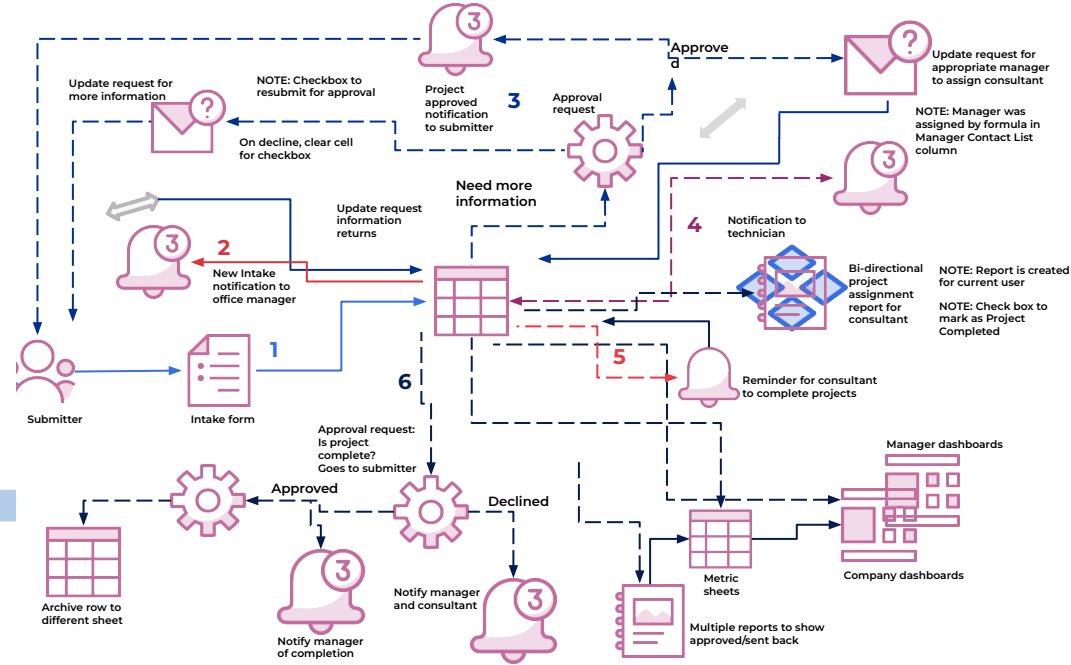
**Total** Count **30**

Department **Consulting** Count **20**

# What did we create?

1. Request intake form
2. New request notification
3. Manager approval workflow
4. Assignment notification
5. Incomplete request reminder
6. Submitter approval workflow
7. Resource and metric dashboard

-  All Tasks
-  Closed across 30 days
-  Closed in Last 30 Days
-  Completed Request Archive
-  Open Tasks
-  Overdue Tasks
-  Sheet - Metrics
-  Task Dashboard
-  Task Intake with Form
-  Waiting Requestor Approval



3

## Adding and scaling

# Possible additions

- Second approval workflow
- Additional reports
- **Document Builder** and eSignature
- **Proofing**
- **WorkApps** for manager role
- **Control Center** to scale
- Department-level dashboards
- **New Timeline View**
- **Data Shuttle** and **Data Table** for Archive
- Use **Bridge** to automate cross-solution
- Salesforce, JIRA, other data

4

## Wrap-up

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# Learning Objectives

Be able to look at a solution with a wider lens

Be able to describe the full workflow of a solution

Be able to identify the components in a solution

# Next steps...

- Check out the Experience Hub and Smart Sessions
- There are sessions that will show you ways to take this solution to the next level and beyond
- Start by drawing your solution!

## 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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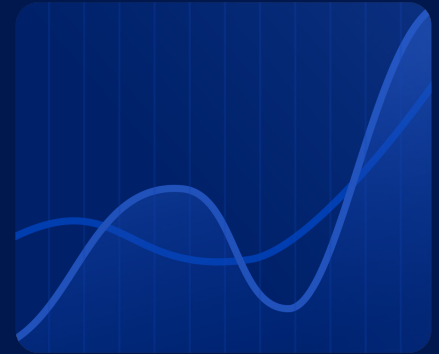
@smartsheet



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