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Intake to archive

The anatomy of a complete solution

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Cicero

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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

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How we think about solutions

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We have a problem with our project intake process

We don't have one

All solutions begin the same

Where it usually starts

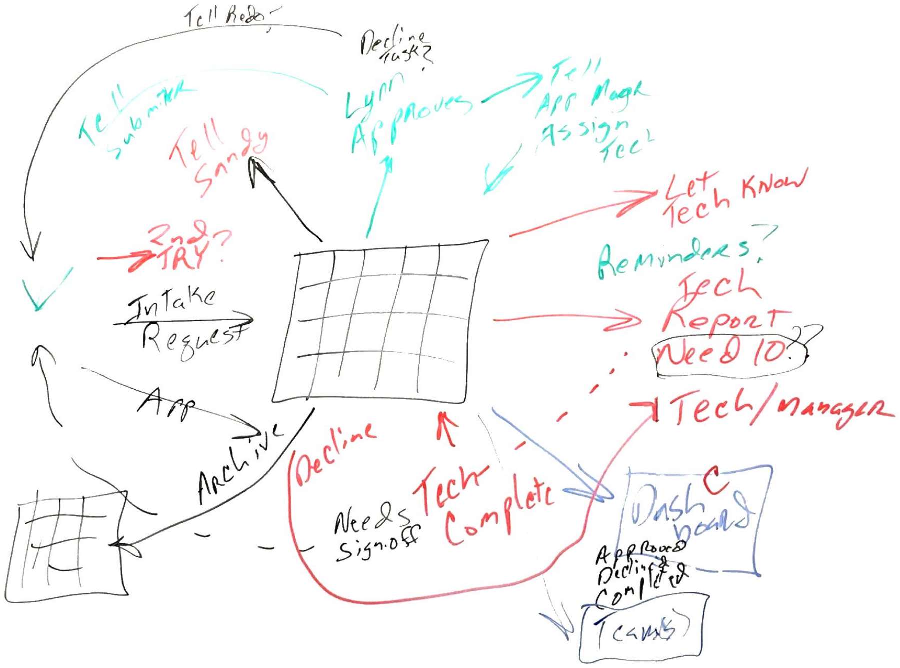
Start fresh
Start from a template
Start by importing

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

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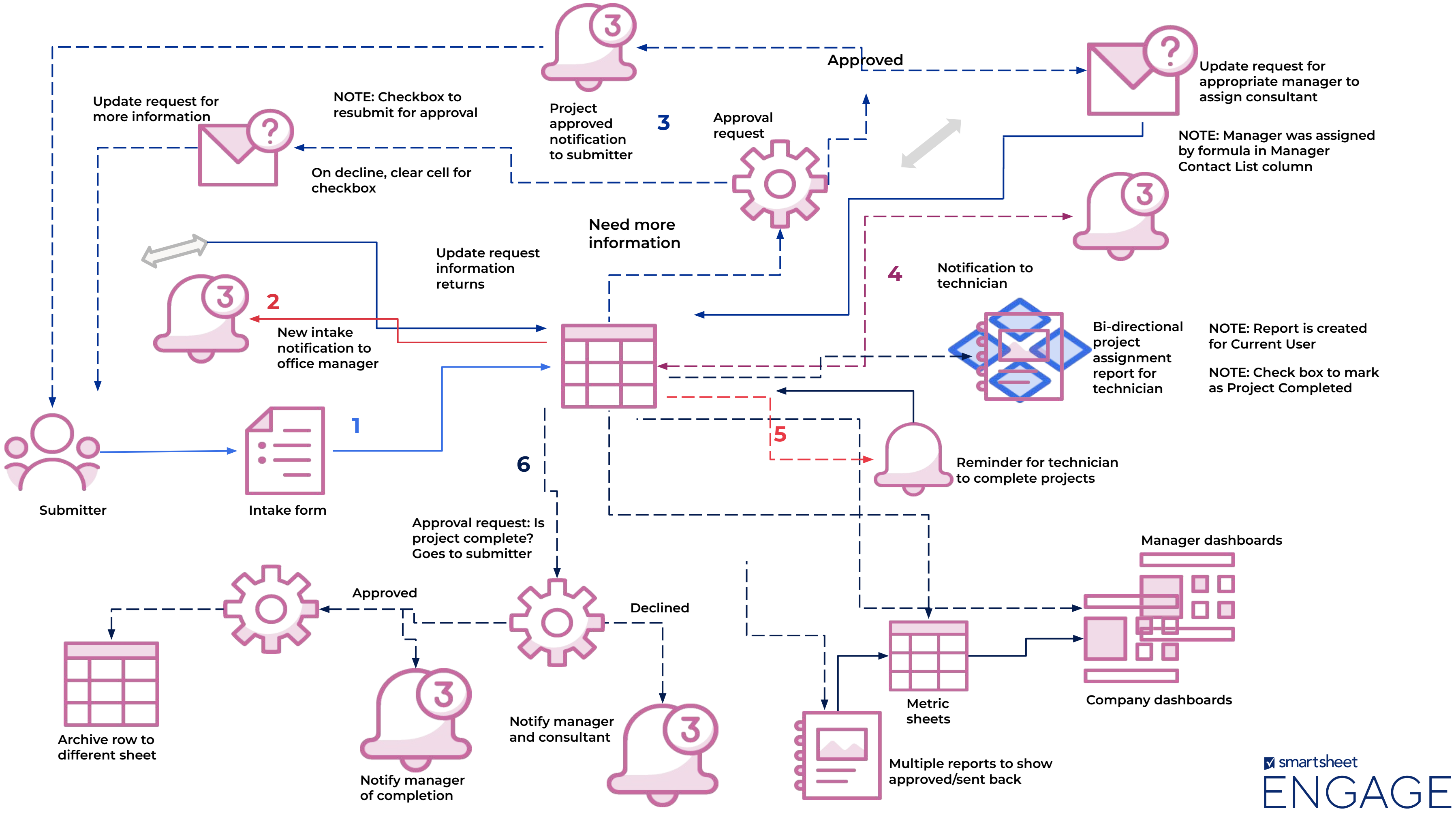
What do we need to do?

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



Project approved notification to submitter
3
Approved
Approval request
Update request for appropriate manager to assign consultant
NOTE: Manager was assigned by formula in Manager Contact List column
Update request for more information
NOTE: Checkbox to resubmit for approval
On decline, clear cell for checkbox
Need more information
Update request information returns
2
New intake notification to office manager
4
Notification to technician
Bi-directional project assignment report for technician
NOTE: Report is created for Current User
NOTE: Check box to mark as Project Completed
1
5
Reminder for technician to complete projects
6
Submitter
Intake form
Approval request: Is project complete? Goes to submitter
Approved
Declined
Archive row to different sheet
Notify manager of completion
Notify manager and consultant
Manager dashboards
Company dashboards
Metric sheets
Multiple reports to show approved/sent back
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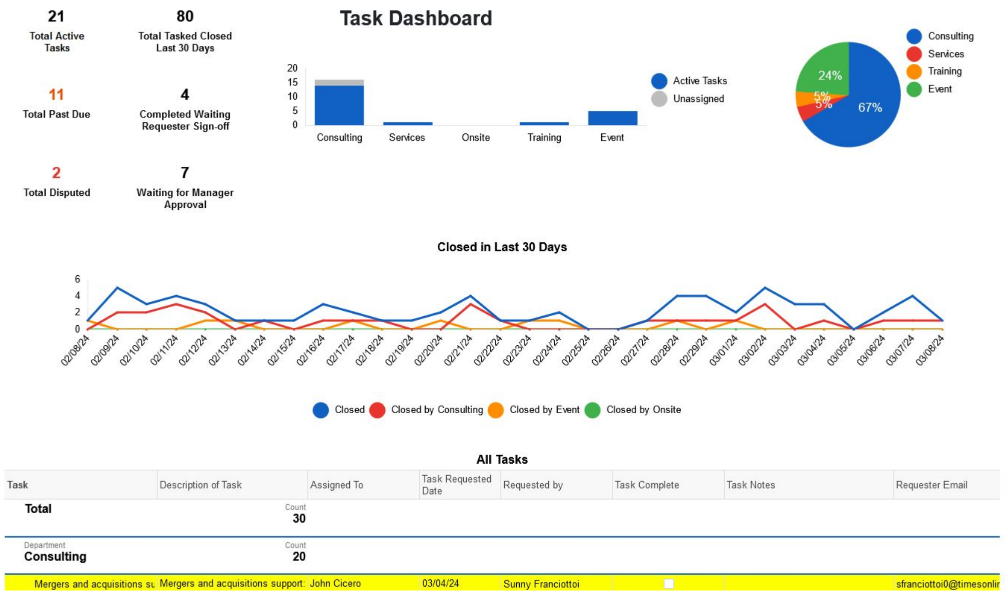
What do you need on the dashboard?

- 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



2

Breaking down the parts

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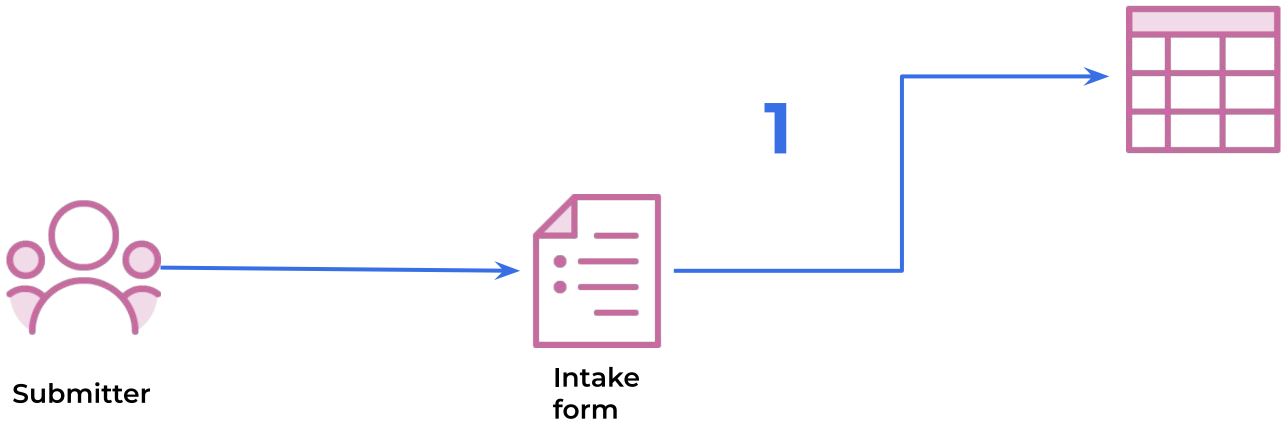
1. Create a single source of intake



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Created By	Manager	Department	Task Requested Date	Resubmit for Approval	Approval Status	A D
ohn.cicero@demo.mbf	Guadalupe Garcia	Consulting	05/28/24		Approved	0

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

Edit reference: {Sheet - Metrics Managers}
{Sheet - Metrics Departments}

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

Assigning the correct manager

“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

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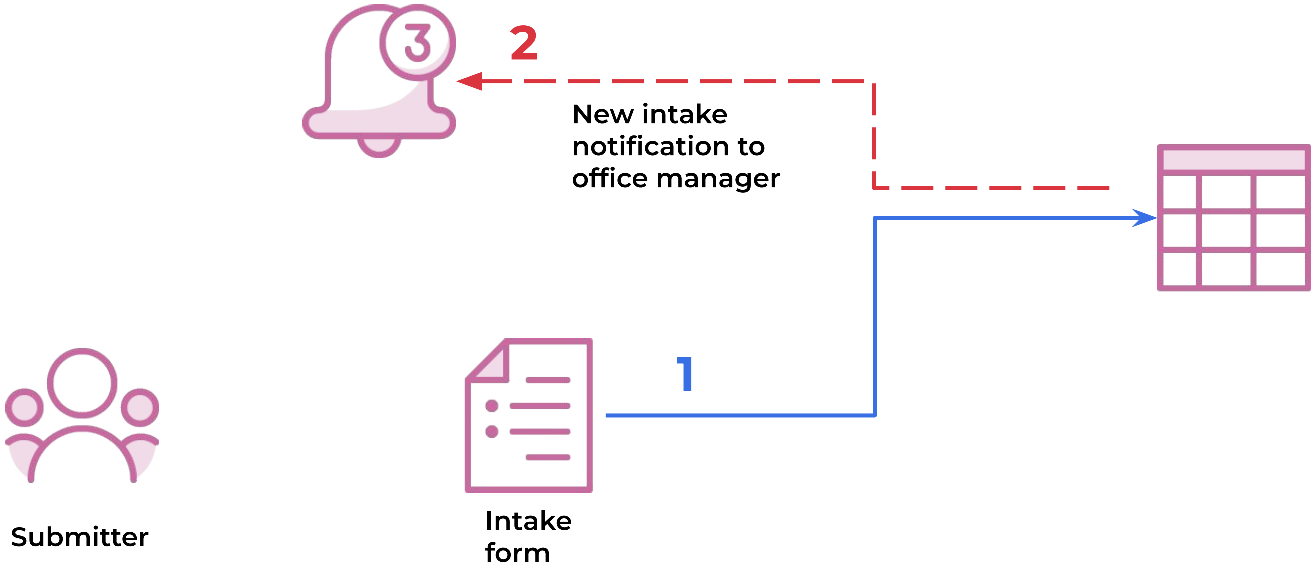
2. Notify office manager



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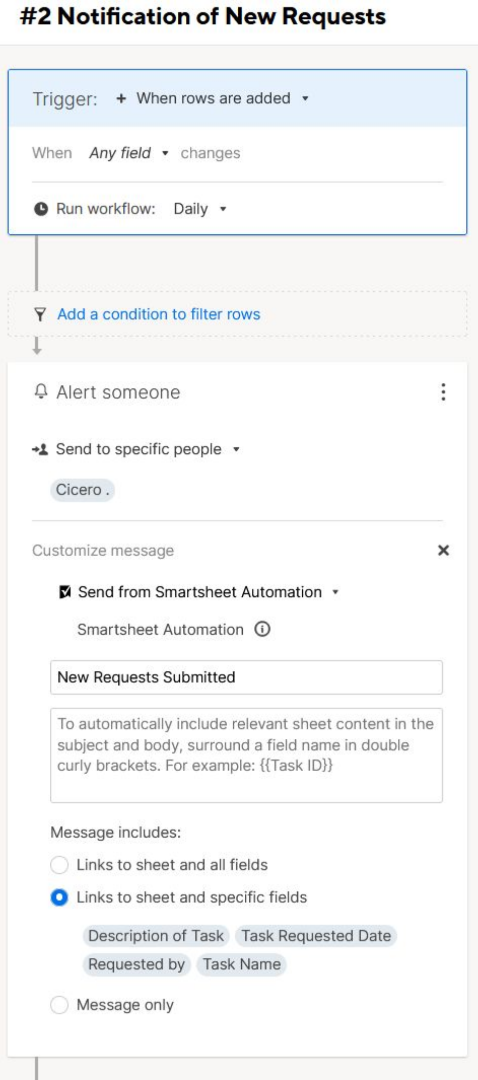

Alert someone

Trigger:
New row added

Condition:
When *Any field* changes

Action:
Alert someone – office manager

Once daily

Send From: Smartsheet Automation

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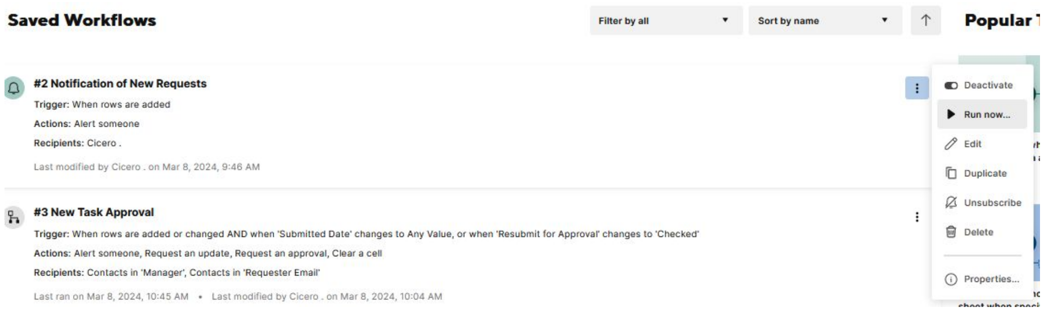
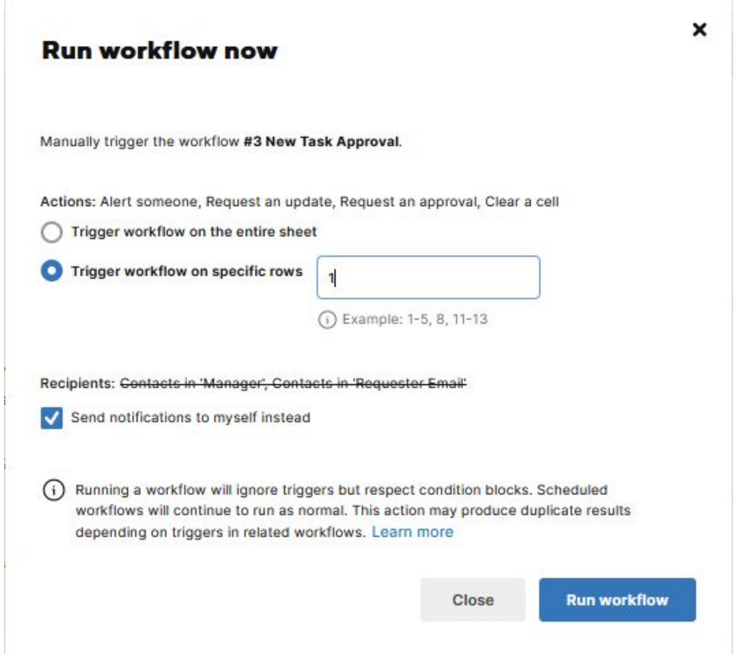
Reply-To email address

From name option selected	From name notification email	Reply-To email address
Send from Smartsheet Automation	**From name** is Smartsheet Automation.	Sheet owner's email address
Send from organization name	**From name** 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 **From name** 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 **From name** for the notification email.	The reply to is the sheet owner's email address
Send from sheet owner (for Update and Approval Requests)	**From name** 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





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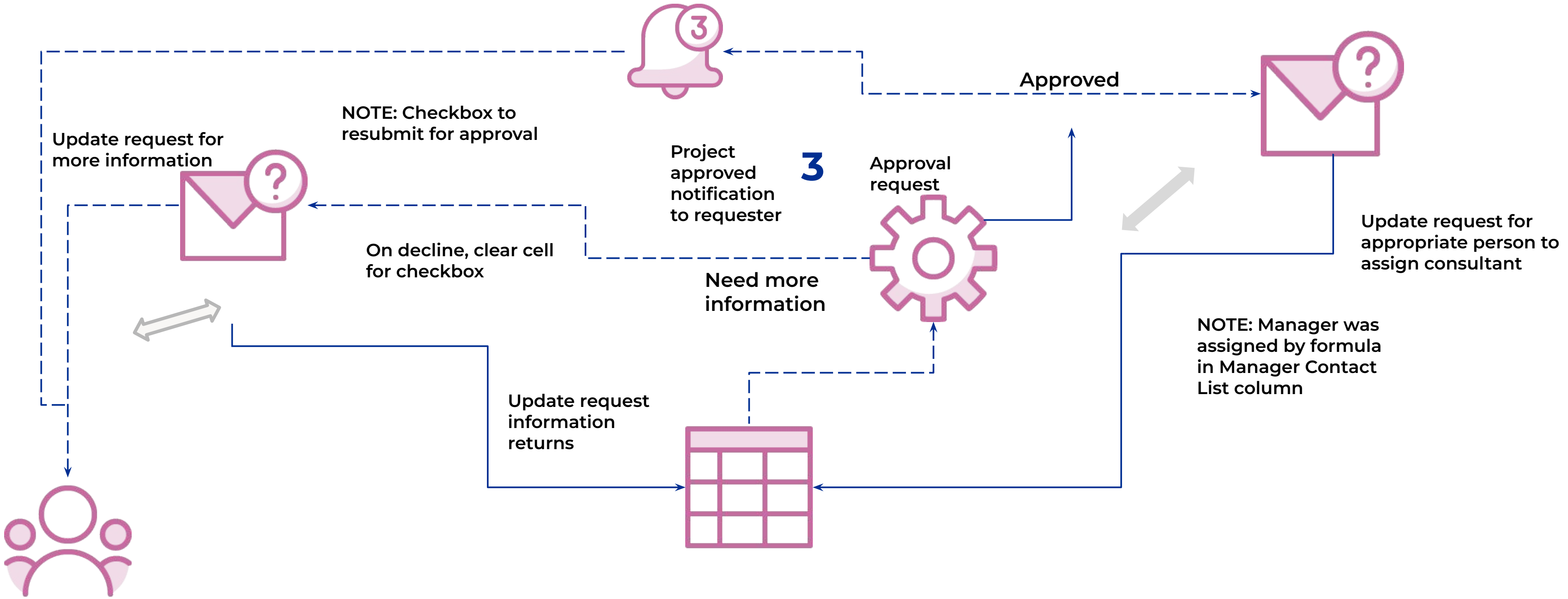
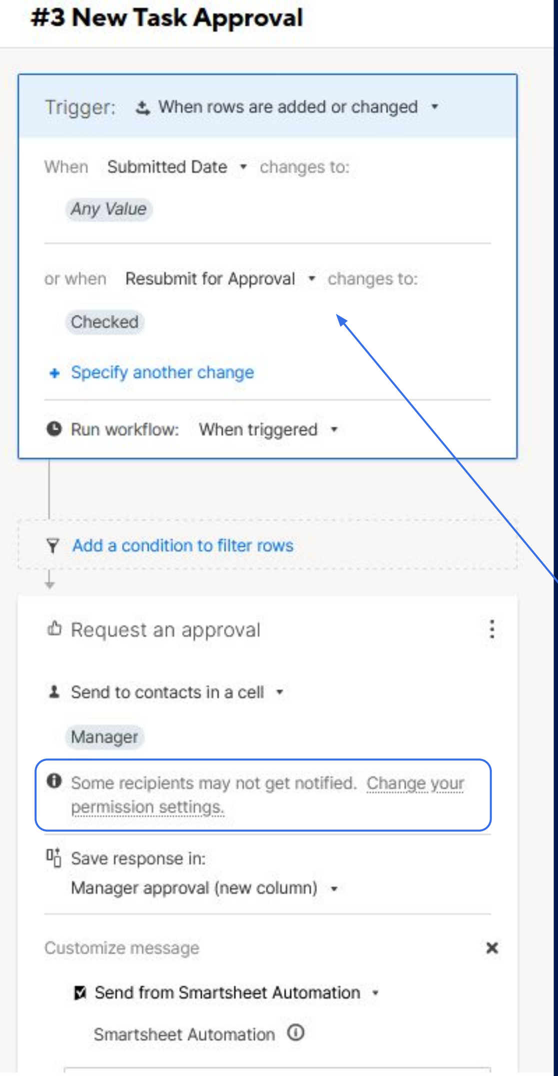
3. Get approval





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.

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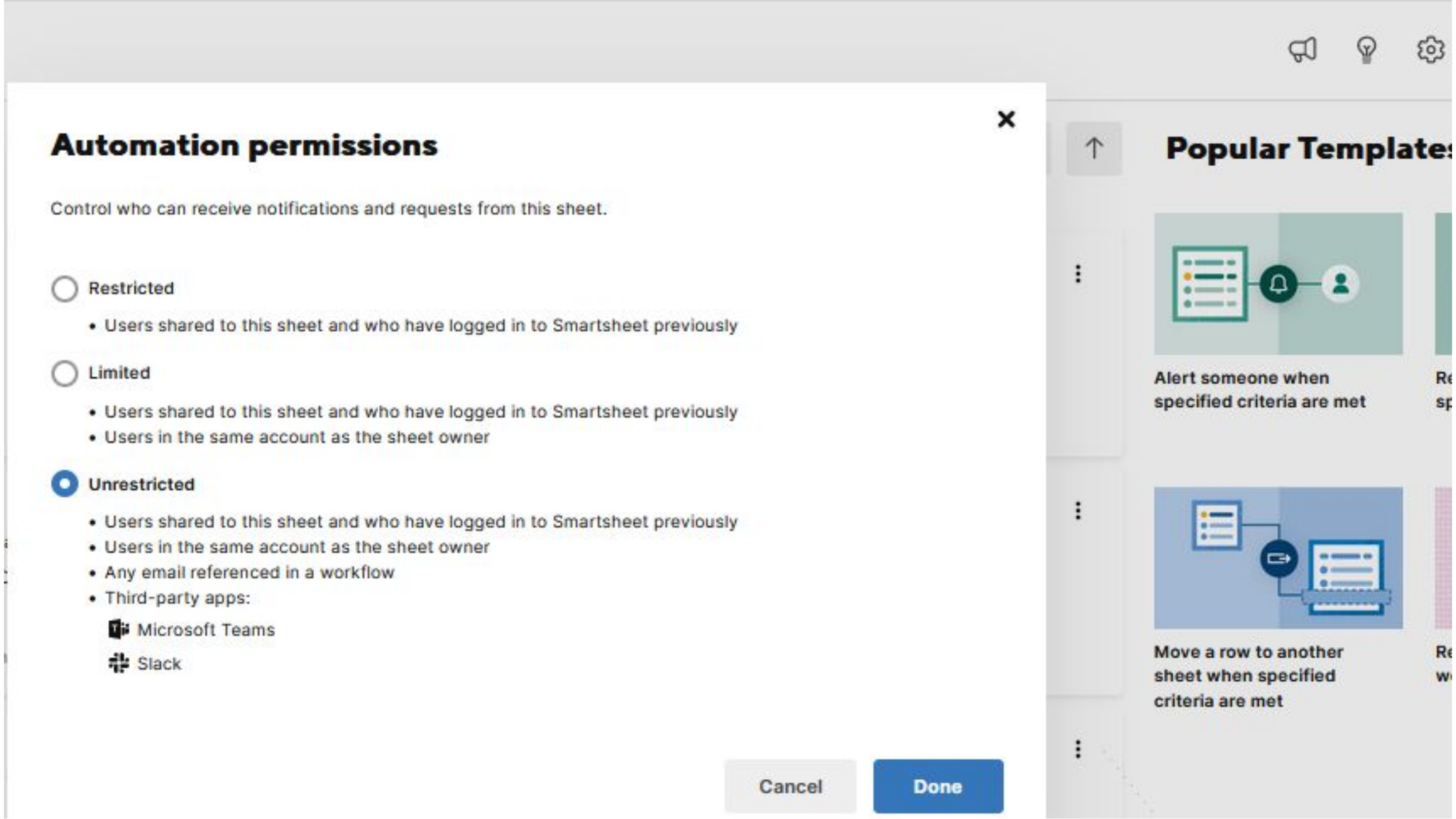
Automation message



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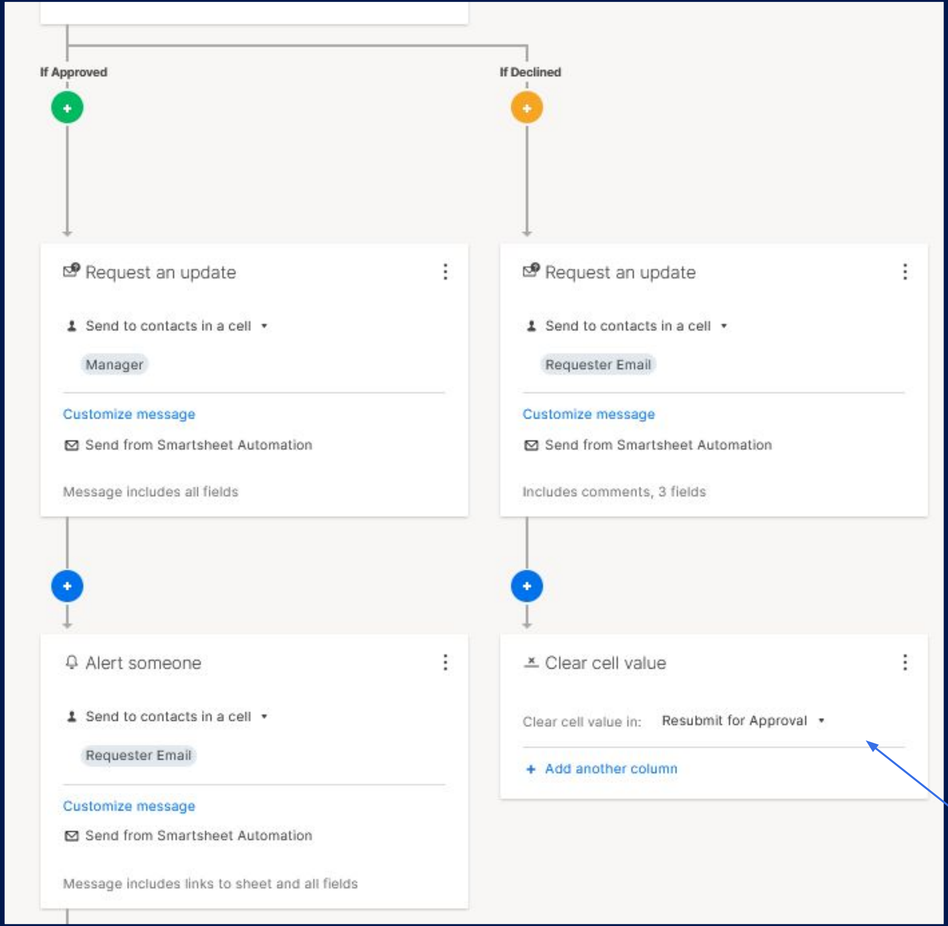


Approval request

Approve

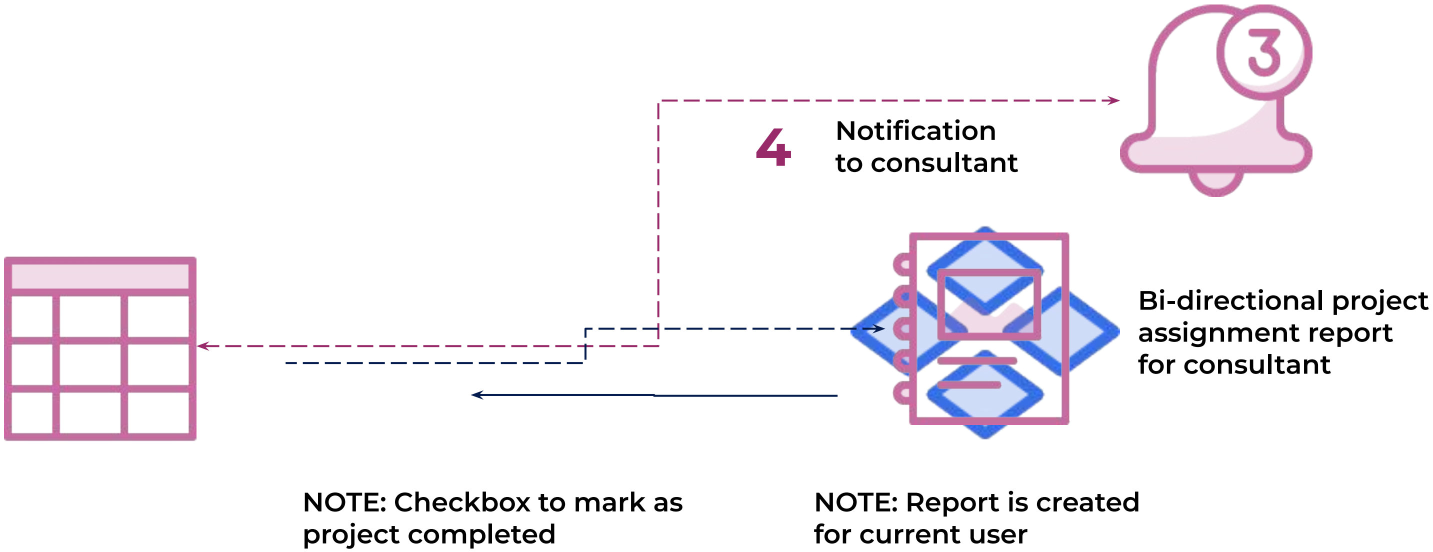
Update request to appropriate manager for task assignment.
Alert to submitter of approval.
Can record a date if desired.

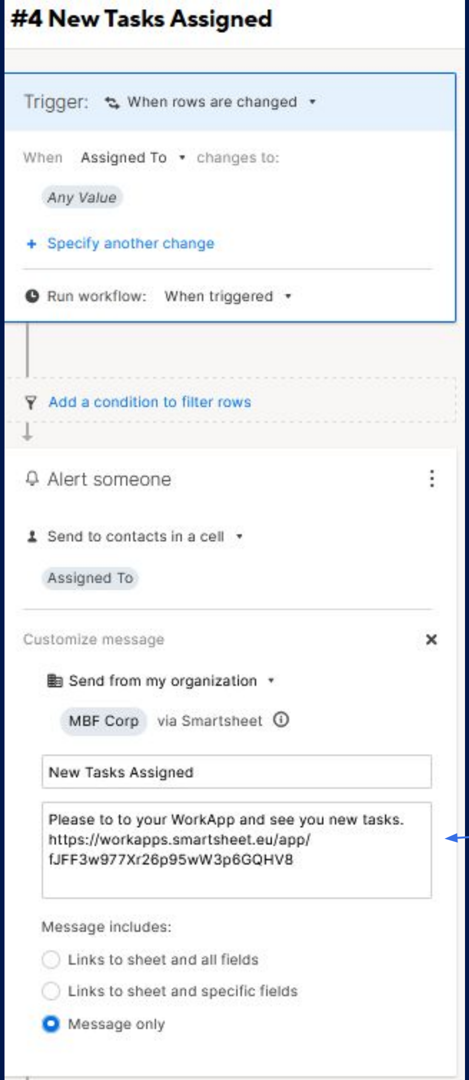
Decline

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





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 WorkApp

WorkApps

Intake to Archive Task...

View as

Consultants ▾

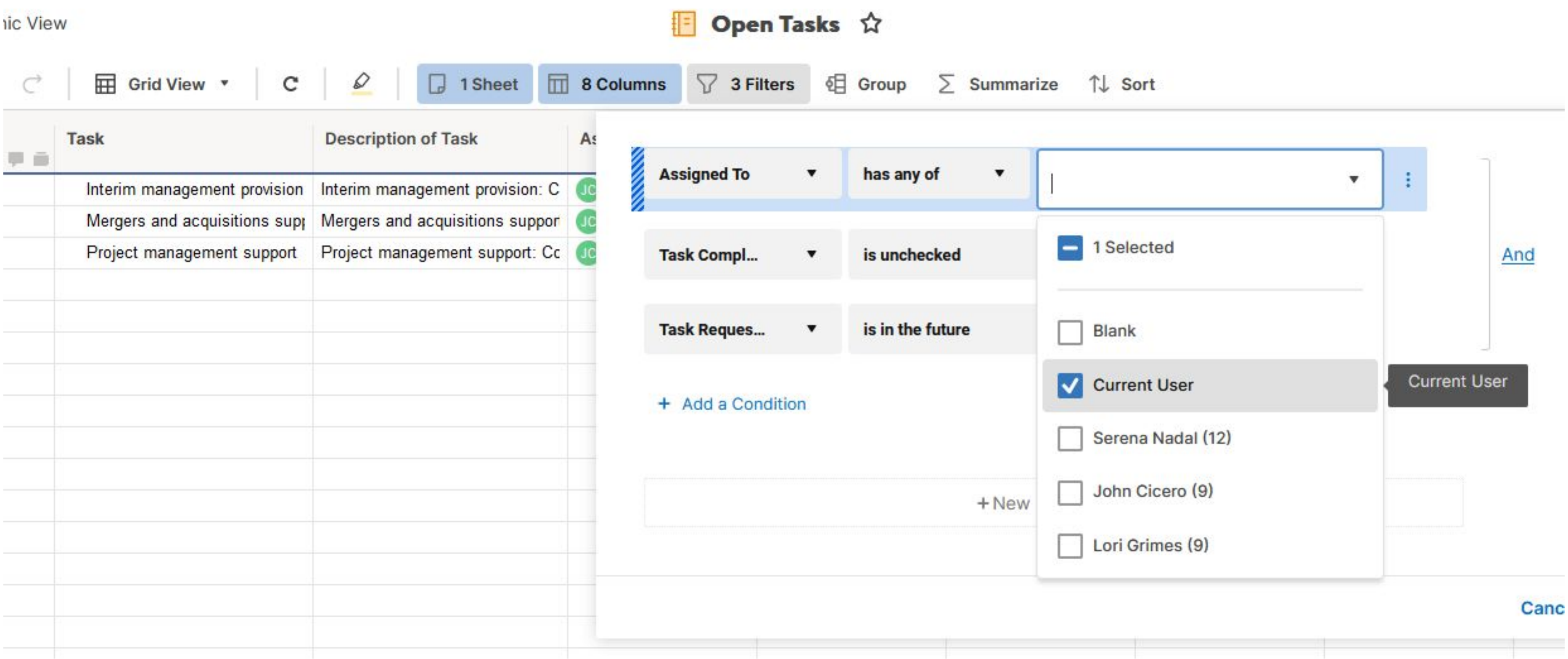
- Open Tasks
- Waiting Requestor Approval
- Overdue Tasks
- Task Dashboard

Overdue Tasks

WorkApps

Sort

	Task	Description of Task	Assigned To	Task Requested Date	Requested by	Task Complete
1	Mergers and acquisitions su	Mergers and acquisitions supp	JC John Cicero	03/04/24	Sunny Franciottoi	☐
2	Strategic planning and recor	Strategic planning and recomm	JC John Cicero	03/04/24	Dotty Leftley	☐
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						



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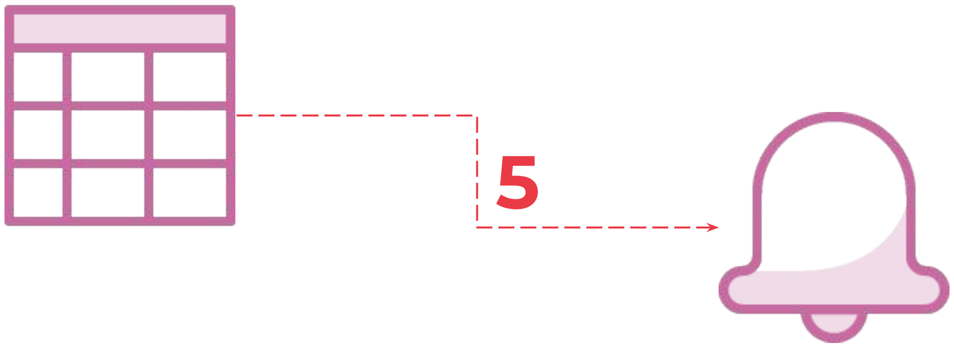
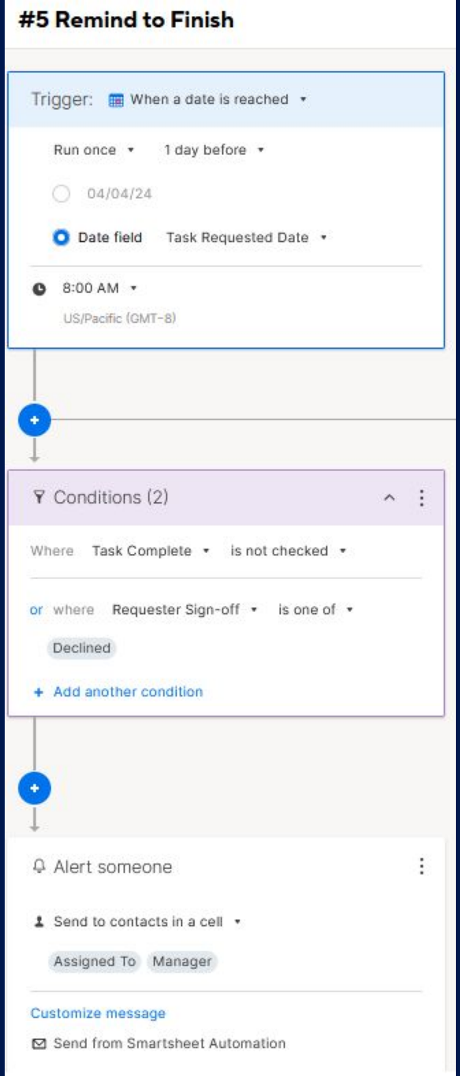
5. Incomplete work reminder



Reminder for consultant to complete tasks



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

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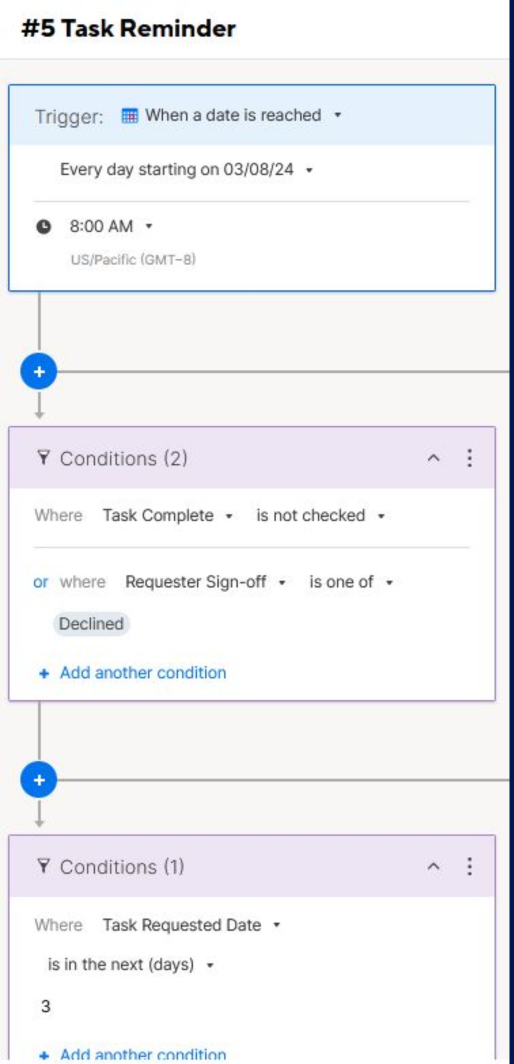


Reminder 3x

Trigger:
Fixed Date
Set time

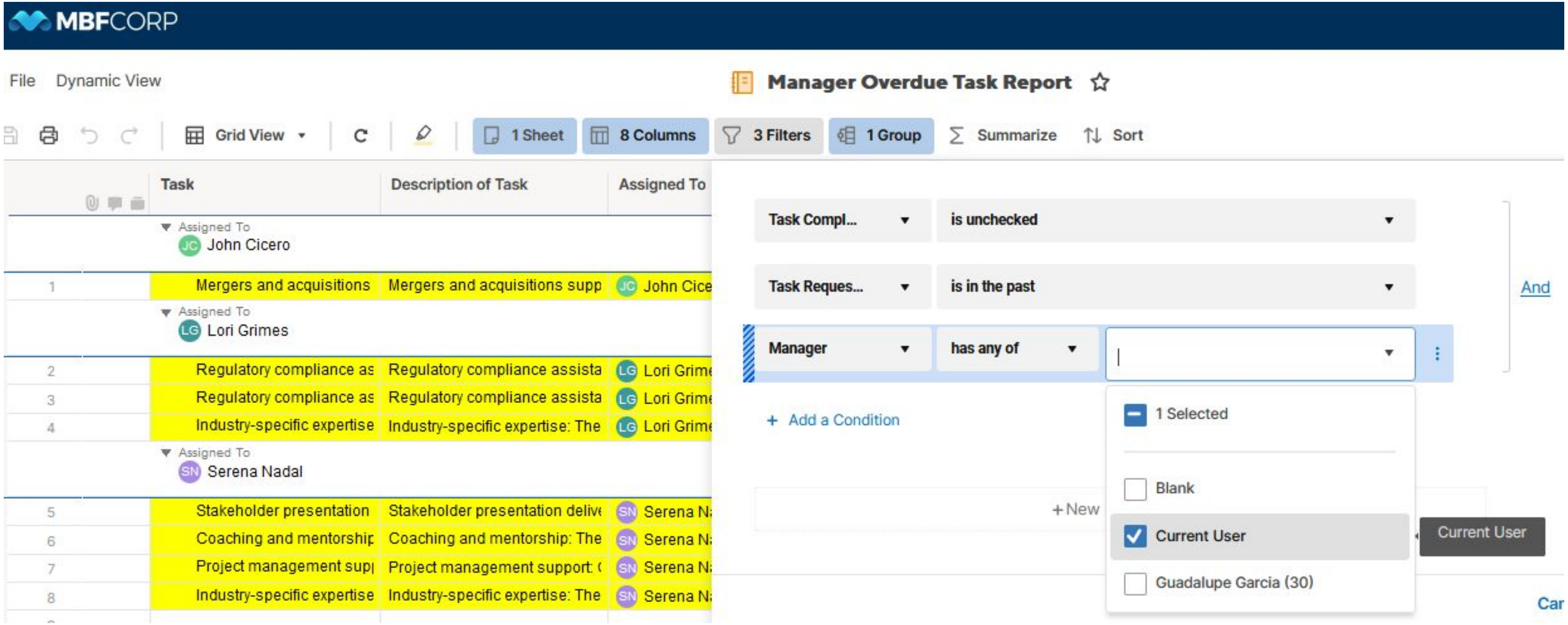
Condition 1:
Task Complete is not checked, or Submitter Sign-off is marked as Declined

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

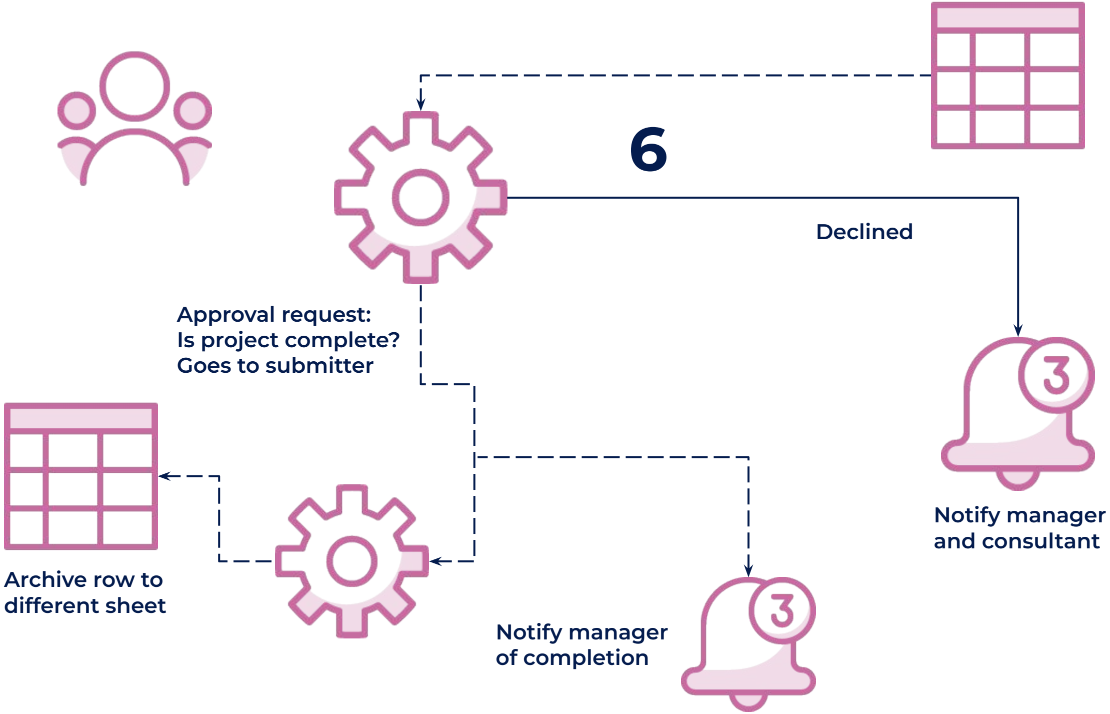
Action:
Alert someone
Assigned Tech and Manager

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

Manager task overdue report



6. Get requester sign-off



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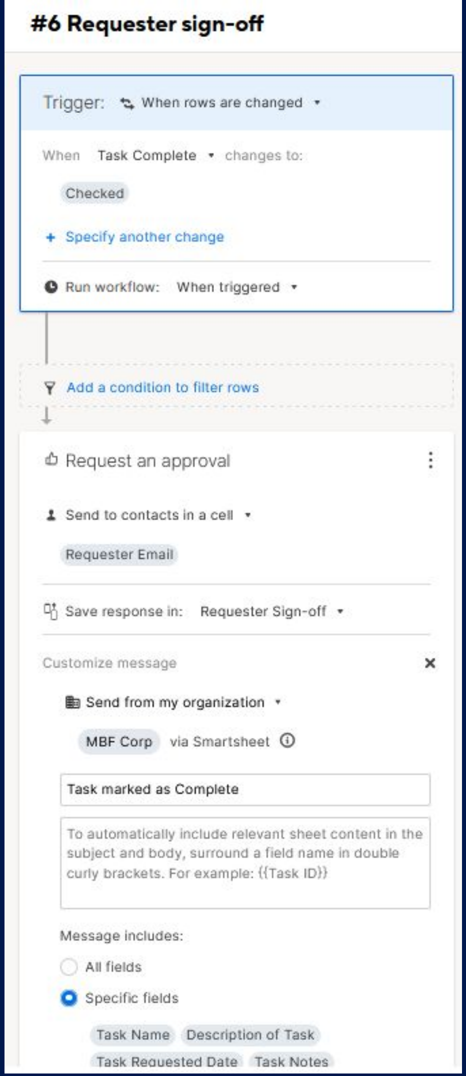

Submitter sign-off
(approval request)

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**

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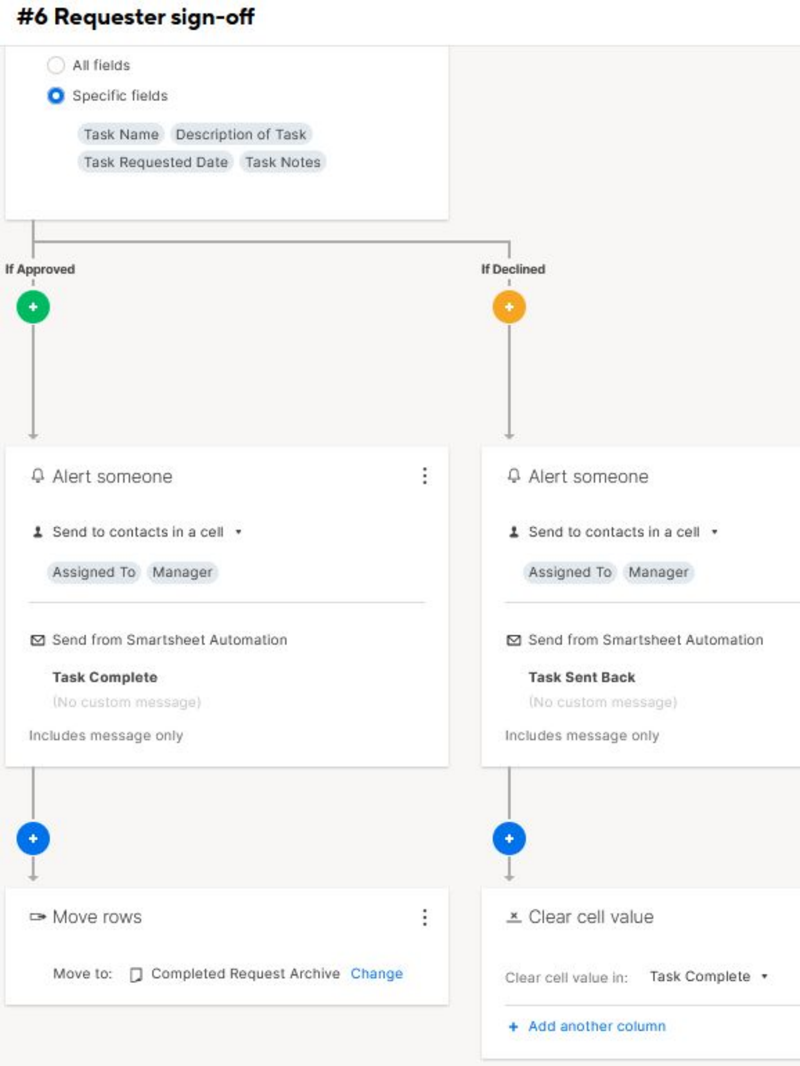

Requester sign-off
(approval request)

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**

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← Task Intake with Form / Manage Workflows

New Workflow

Saved Workflows

Filter by all ▾

- All
- Active
- Inactive
- Unable to run

Sort by name ▾

#2 Notification to Office

Trigger: When rows are add

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

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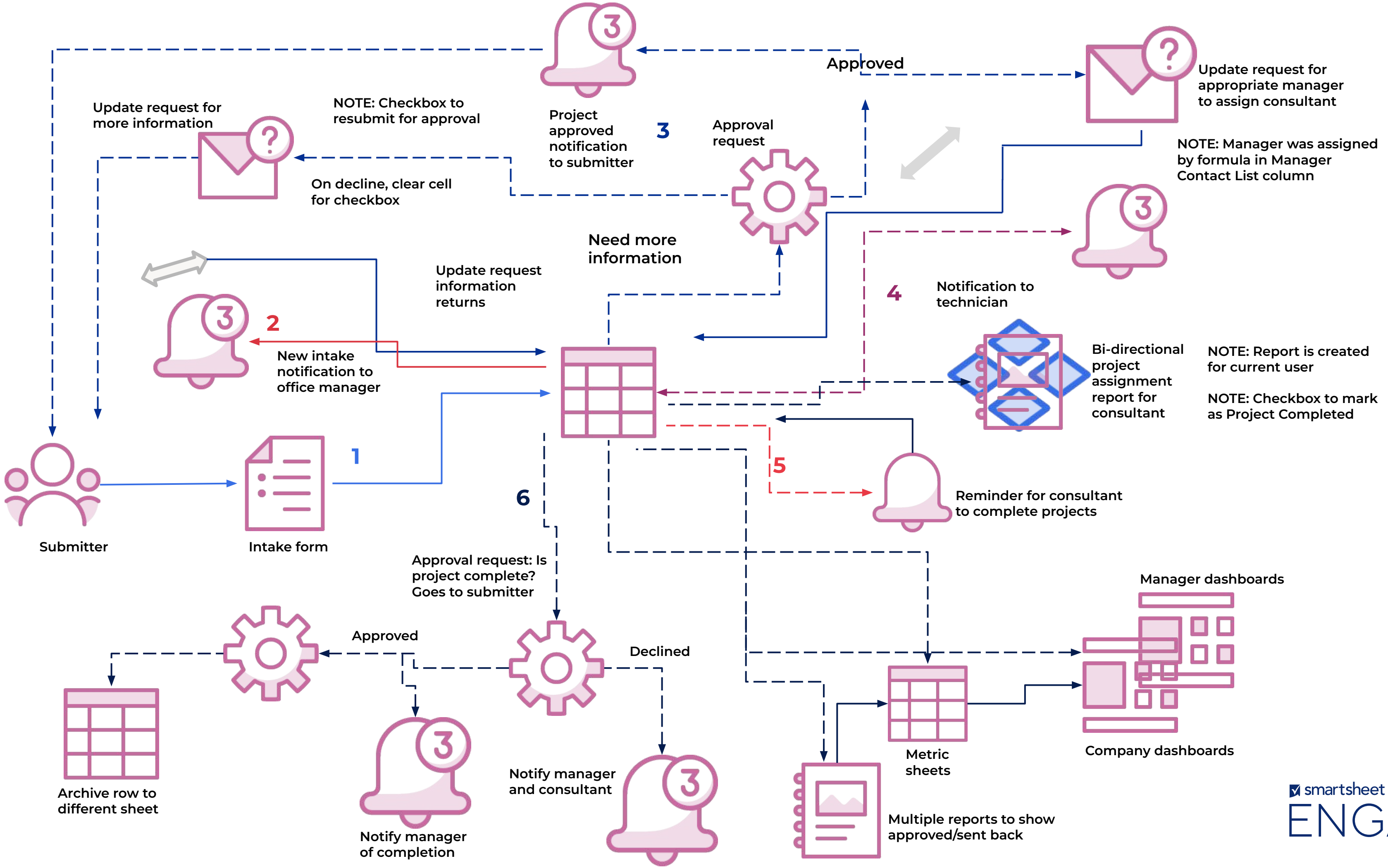

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Metrics sheets to aggregate data

n Forms Connections Dynamic View

Sheet - Metrics

Grid View Filter Arial 10

Label	Metric 1	Metric 2	Metric 3	Departments	Metric 4
Projects by Department Waiting Approvals	Count				
Consulting	5				
Services	0				
Onsite	0				
Training	2				
Event	0				
Department	Active Tasks	Unassigned	Completed Waiting Sign-off	Disputed	Overdue
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
Consultant Assignments	Assigned Tasks	# Disputed			
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

Total Active Tasks

23

Total Tasked Closed Last 30 Days

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

Total Past Due

11

Total Disputed

3

Waiting for Manager Approval

7

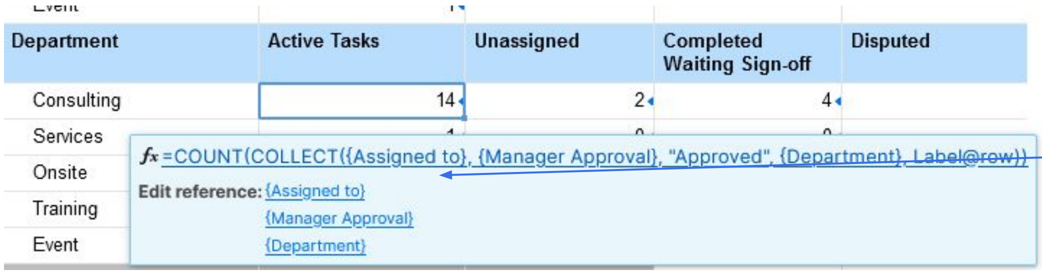
Completed Waiting Requester Sign-off

3

Metrics sheets formulas

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

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



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

Using the ISBLANK to find the blank Assigned to cells.

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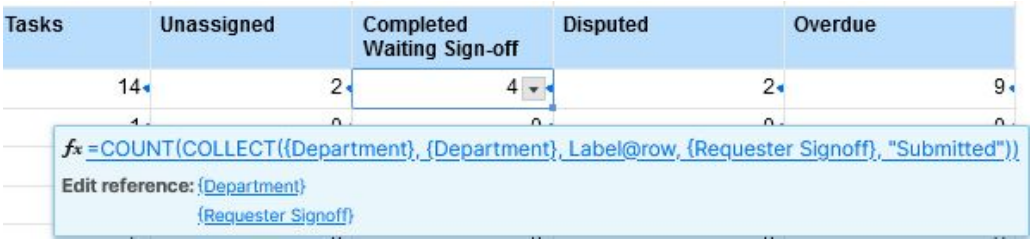
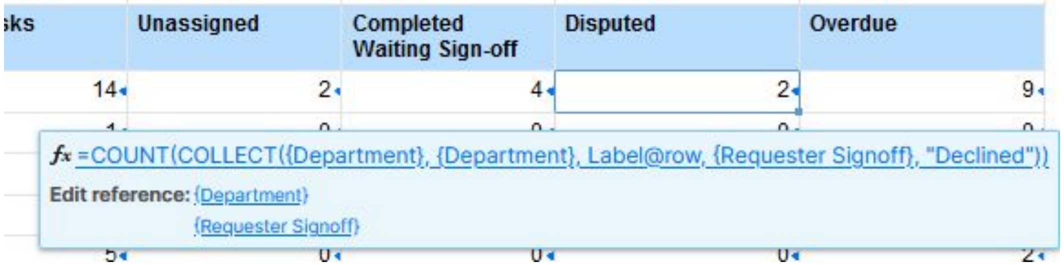
Metrics sheets formulas

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 be checked so this doesn't need to be part of the formula



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

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

80
Total Tasked Closed Last 30 Days

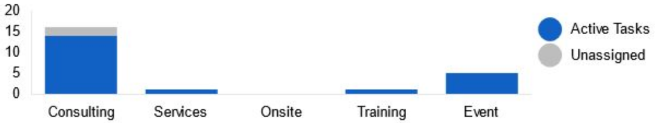
11
Total Past Due

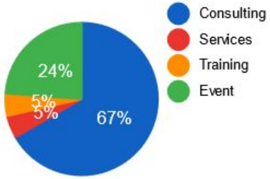
4
Completed Waiting Requester Sign-off

2
Total Disputed

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**						
Mergers and acquisitions su	Mergers and acquisitions support:	John Cicero	03/04/24	Sunny Franciottoi	☐		sfranciottoi0@timesonlir

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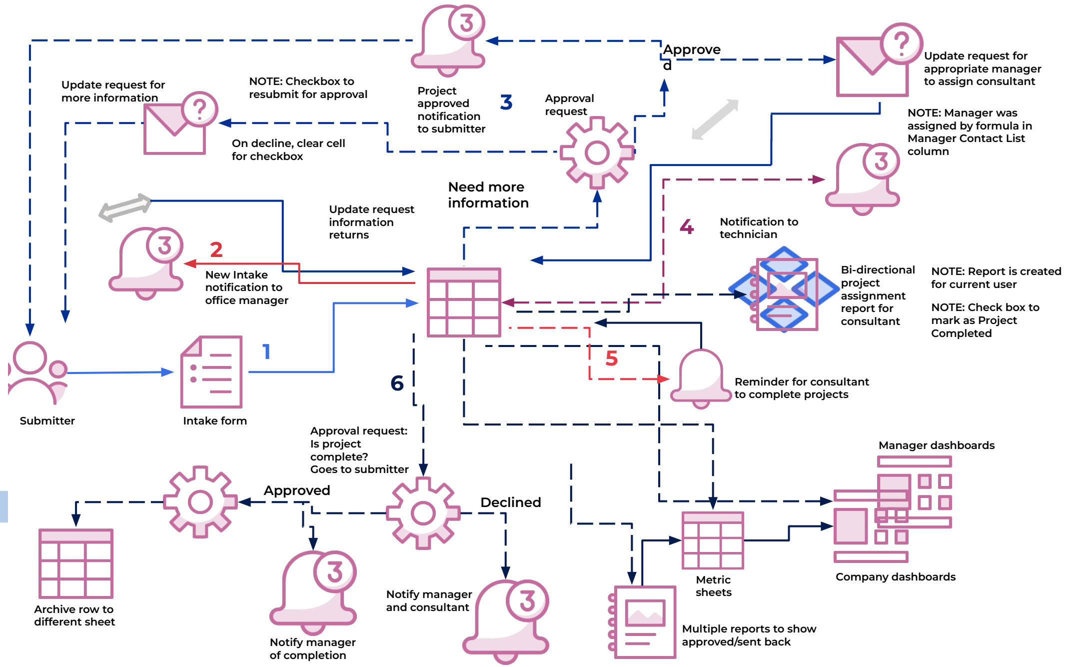
What did we create?

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
- Manager Overdue Task Report
- Open Tasks
- Overdue Tasks
- Sheet - Metrics
- Task Dashboard
- Task Intake with Form
- Waiting Requestor Approval



3

Adding and scaling

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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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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

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Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

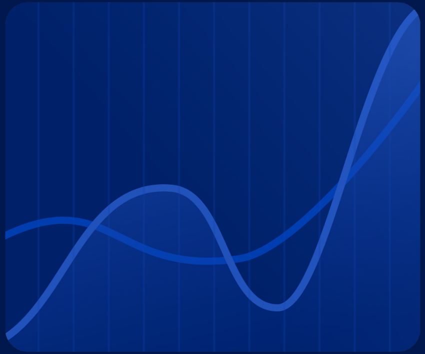
@smartsheet

@smartsheetplatform

@smartsheet

@smartsheet

@smartsheet



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