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Discover Advanced Automations Using Bridge

Elevate your solutions with Bridge by Smartsheet



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v.07/16

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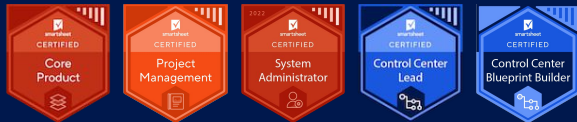
Session Speakers

Who are we anyways?



Chad Eiring

Manager, Technical Account
Management



Josh Jones

Sr. Solutions Engineer



Learning Objectives and Agenda

You should leave here feeling confident about...

- 1** Overview of what Bridge is
What is it and when to apply it in your solutions
- 2** Feel confident getting started
Review the components and process of building a workflow
- 3** Expand your imagination
See an example of a common solution that brings in more complexity

First things first

Let's get acquainted




1

Overview of Bridge

What is it and how does it work

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“ Smartsheet enables everyone to do great things. Bridge helps you do those things **YOUR** way. ”

What is Bridge?

Bridge is a drag-and-drop workflow builder that uses process-driven thinking and an understanding of coding concepts to design flexible process automation.

What Bridge is NOT?

Bridge is NOT a catch-all integration tool



What can you use Bridge for

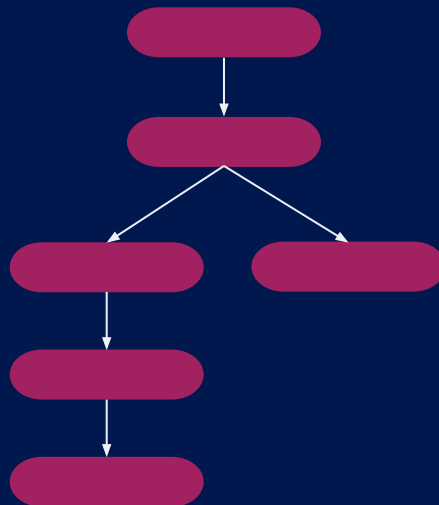
Bridge allows you to build triggered workflows to automate repeatable, condition-based processes.

Event or schedule based triggers

Use conditional logic and junctions for additional flexibility

With Bridge you can:

- Respond to changes in your data to trigger your process
- Gather and aggregate data
- Analyze / transform specific pieces of data based on conditions you define
- Take actions in Smartsheet, Resource Management, and more
- Eliminate manual, tedious, and time consuming manual steps in your process as your business grows



But what about Automation Workflows?

Use automation to apply custom logic to your solutions



Automated workflows

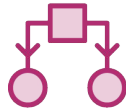
Sheet-level processes

Collaborate

- Notify
- Request changes

Conduct work

- Change data
- Change configurations
- Drive in sheet processes



Bridge

Smartsheet-level processes

Sheet

- Customize
- Expand

Solution

- Coordinate actions
- Define logic
- Kick off complementary processes
- Manage environment and administration
- Pairs well with advanced capabilities

Core building blocks

Bridge Workflow Structure

Triggers

Define when your workflows will run

You can respond to changes or set schedules for your process.

There are several types of triggers:

- **Smartsheet** (e.g. Smartsheet, Resource Management, etc.)
- **Schedule** (e.g. hourly, daily, etc.)
- **Parent** (e.g. Parent / Child workflows)

Modules

Get information, take actions, or analyze data

Modules, and how you structure them in the workflow, are where Bridge gets its flexibility.

You can put modules in whatever order and structure is needed to optimize your process.

They serve a variety of purposes from fetching data to running Javascript code.

Conditions

Use junctions to automate condition-based actions

Junctions are a special type of module that can be placed almost anywhere in your workflow and allow you to define conditions.

Conditional Junctions allow you to analyze the data in your workflow so you can follow different paths depending on the output.

Bridge Advanced Topics

Workspaces. Integrations and Child Workflows

Workspaces

Hold a set of related Workflows

- Each workspace has its own set of integration authentication
- Each workspace has its own set of Javascripts
- Each workspace has its own set of API base URLs
- Workflows within the same workspace can be called as child workflows

Integrations

Allow you to use pre-built API wrappers for RM and Smartsheet

- Authenticate (or log into) each integration with the user that you wish to run as
- A lot of the API has pre-built modules that make your life easier
- Some API endpoints do not have wrappers and can be called with the Make API call module

Child Workflows

Allow you to run a sub-workflow from a parent

- Can use an array as the number of runs to have the child workflow run once per element of the array
- Single run workflows (number of runs empty) can pass back data to the parent workflow

2

Use case walkthrough

Pushing project data from Smartsheet to Resource Management

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Pushing Project Data from Smartsheet to RM

- A common scenario that users face is that when using Smartsheet Control Center with the Resource Management by Smartsheet integration, project data is only sent to RM when the project is provisioned, but is not kept up to date after this.
- Project has to be manually updated in RM

Setting the Stage

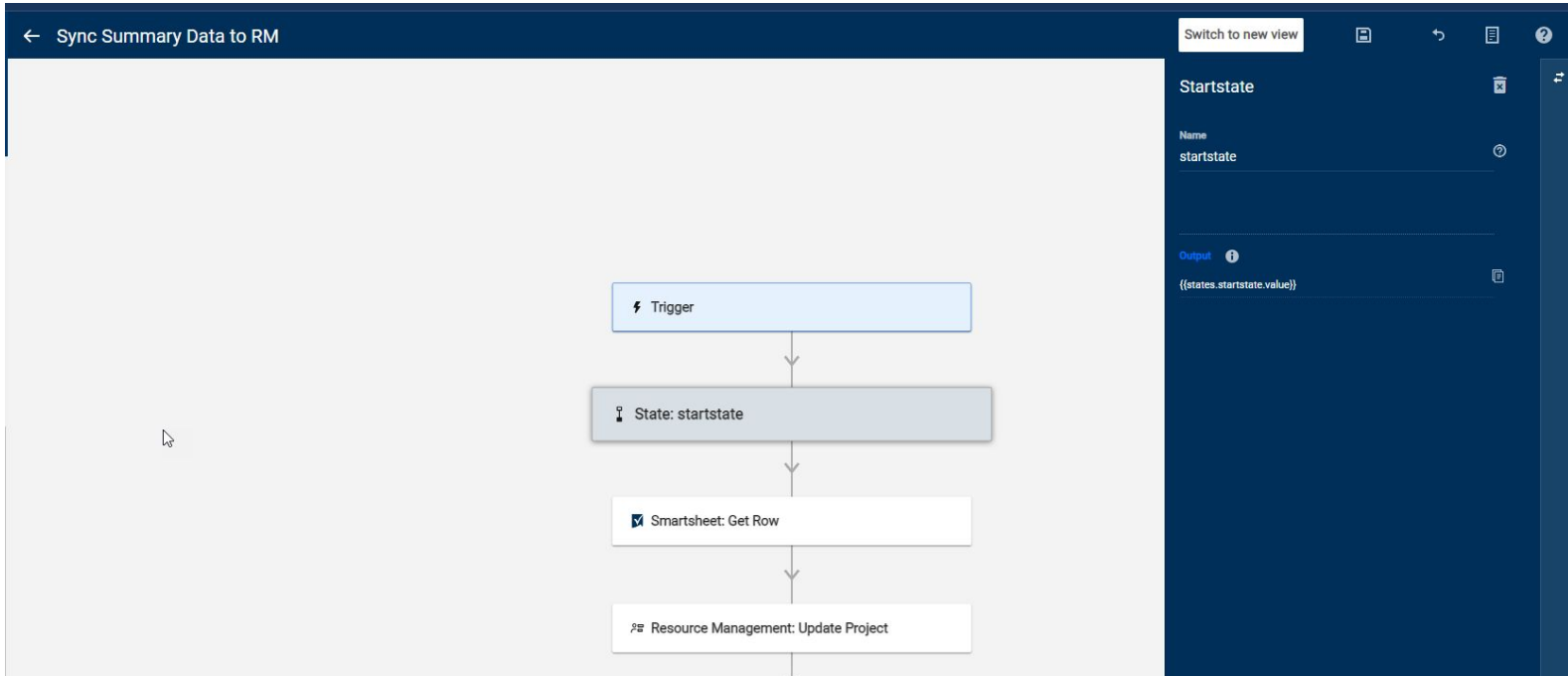
- Smartsheet Control Center utilizes profile data that
 - Starts on an intake sheet
 - Is linked or copied into a sheet within a folder during provisioning
 - Is linked out to a summary sheet
- When Smartsheet Control Center is setup to integrate with RM by Smartsheet, the intake data is used to create the project in RM and will use the project name, description, start date, and end date that are on Intake

Project Description, Project Start and Project End Dates can change, and RM not updated

Bridge Can Help!

Two Step Workflow!

- Get Row
- Update Project



Let's build a workflow!

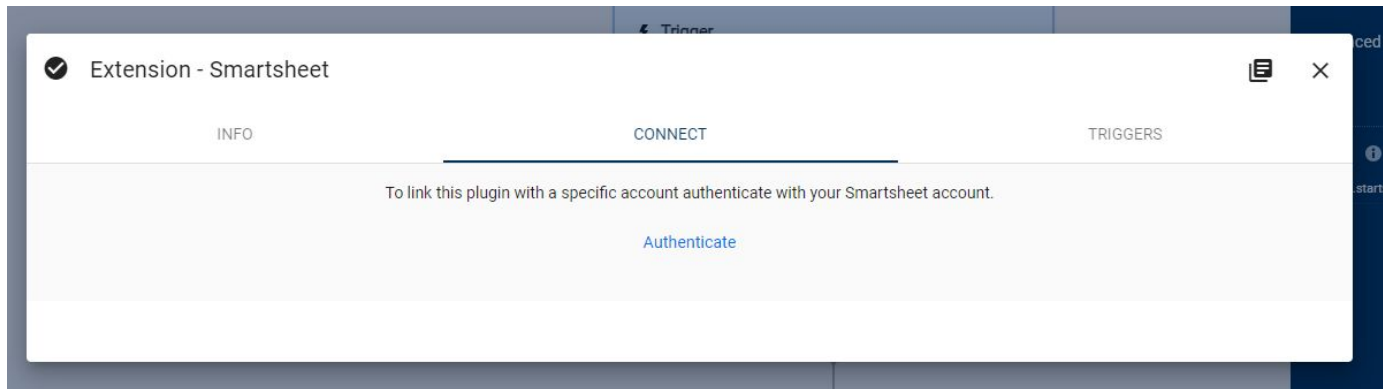
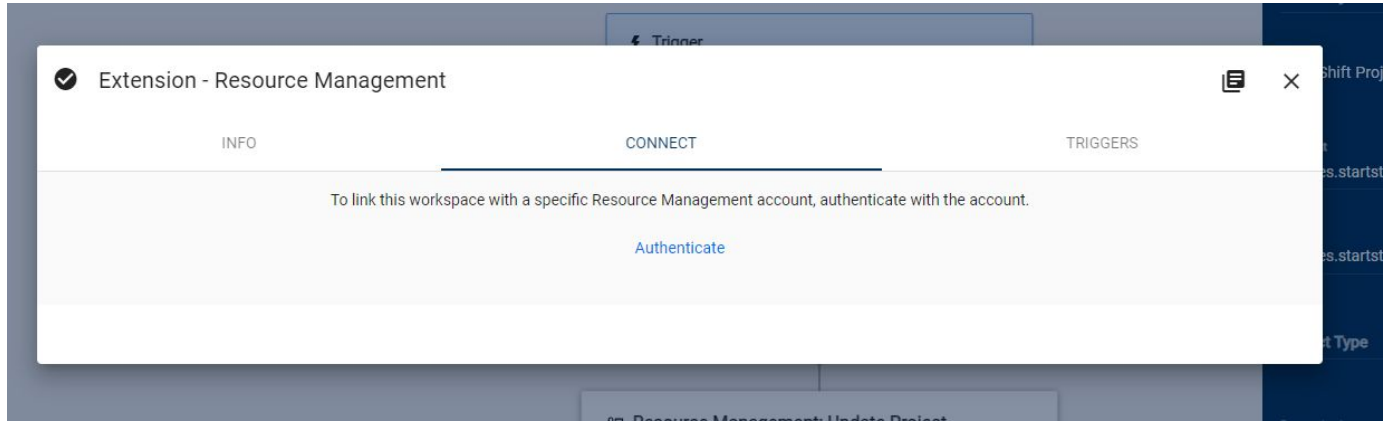
Demonstration



Get Row

The image shows a workflow editor interface. On the left, a vertical flow of steps is connected by downward arrows. The steps are: a light blue 'Trigger' box, a grey 'State: startstate' box, a white 'Smartsheet: Get Row' box (which is selected with a checkmark), and a white 'Resource Management: Update Project' box. On the right, a dark blue configuration panel for the 'Smartsheet' step is open. It has a title bar with 'Smartsheet' and a settings icon. Below the title, the step name 'Get Row' is displayed. The configuration includes: 'Sheet' with the value `{{8646247455870852|runtime.sheetID}}`; 'Row ID' with the value `{{452679102140292|runtime.event.id}}`; and an 'Advanced Options' section with a right-pointing arrow and a help icon. At the bottom of the panel, the 'Output' is shown as `{{states.startstate.smartsheet.get_row}}`.

Integration Authentication



Run Log

Switch to new view

< All Runs Sep 20th, 16:26:04

✓ Completed
Run duration: 4 seconds

- ▶ ⚡ Trigger
 - 📄 State: startstate
- ▼ ⌚ Smartsheet: Get Row
 - Output: *Object*
 - ▼ row: *Object*
 - accessLevel: "ADMIN"
 - ▶ cells: *Object*
 - createdAt: "2023-08-01T22:08:19Z"
 - expanded: true
 - id: 452679102140292
 - modifiedAt: "2024-09-20T16:19:30Z"
 - rowNumber: 2
 - sheetId: 8646247455870852
 - siblingId: 1456769514901380
 - version: 5252
- ▼ ⌚ Resource Management: Update Project
 - Output: *Object*
 - ▼ data: *Object*
 - archived: false
 - archived_at: null
 - ▶ can_i: *Object*
 - client: "Echo"
 - created_at: "2024-09-13T18:10:53Z"
 - deleted_at: null
 - description: "Project Goals and Objective..."
 - ends_at: "2023-01-02"
 - guid: "f4f3ae3e-e92e-4bb5-b195-d252f7..."
 - id: 9743981

Update Project

The image shows a workflow editor on the left and a configuration panel on the right. The workflow consists of four steps: a Trigger, a State named 'startstate', a Smartsheet: Get Row action, and a Resource Management: Update Project action. The configuration panel on the right is titled 'Update Project' and includes fields for Project Id Or Name, New Project Name, Shift Project (checkbox), Starts At, Ends At, Project Type, Description, Project Owner (User Id Or Email), and Archive (checkbox). Each field has a help icon.

Workflow Steps:

- Trigger
- State: startstate
- Smartsheet: Get Row
- Resource Management: Update Project

Configuration Panel: Update Project

- Project Id Or Name: `{{states.startstate.smartsheet.get_row.row.cells.Proje?`
- New Project Name: [?]
- Shift Project: [?]
- Starts At: `{{states.startstate.smartsheet.get_row.row.cells.Start?`
- Ends At: `{{states.startstate.smartsheet.get_row.row.cells.Due?`
- Project Type: [?]
- Description: [?]
- Project Owner (User Id Or Email): [?]
- Archive: [?]

Trigger

The screenshot displays a workflow editor interface. On the left, a vertical flowchart shows four steps: a blue 'Trigger' box, a grey 'State: startstate' box, a white 'Smartsheet: Get Row' box, and a white 'Resource Management: Update Project' box. On the right, a dark blue sidebar contains a 'Triggers' section with a 'Switch to new view' button and icons. Below this is an 'Integrations' section with a dropdown arrow, a descriptive link, and a 'Smartsheet' integration card. The card lists: Trigger Name: when row is changed - portfolio summary; Sheet Name: Portfolio Summary; and Event Type: When Rows Are Changed. Further down are 'Parent Workflows' and 'Schedules' sections, both with right-pointing arrows.

Switch to new view

Triggers

Integrations

Create a trigger from applications on the *Integrations page*.

Smartsheet

Trigger Name: when row is changed - portfolio summary

Sheet Name: *Portfolio Summary*

Event Type: When Rows Are Changed

Parent Workflows

Schedules

Trigger

State: startstate

Smartsheet: Get Row

Resource Management: Update Project

Trigger Setup

Extension - Smartsheet

INFO CONNECT TRIGGERS

Triggers

Trigger 1

Trigger Name
when row is changed - portfolio summary

Sheet ID
8646247455870852

Sheet Name
Portfolio Summary

Event Type
When Rows Are Changed

Workflow
Sync Summary Data to RM

Add to Triggers

Disconnect Save

What else can be done?

- You could set up triggers on only the columns that are sent to RM so that the workflow doesn't run as often
- You can send other project information that wasn't sent by SCC at provisioning (project type, project code, client, etc)

What shouldn't you try to do?

- **Bidirectional Sync**
 - There is no timing guarantees with Bridge, so bi-directional syncs are not reliable
- **Update Project Names**
 - Project names changes in SCC can cause issues
- **Sync Assignment**
 - Done automatically via the SCC - RM Integration

3

Expanding on these concepts

Let's apply the concepts we just learned with another use case

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Setting the Stage

What is our process and what are we solving for

- We are the owners of a critical business process with exec. level visibility
- Our process captures requests from a variety of field teams
- A single request may have multiple options that are needed
- Different internal teams are responsible for completing the requested work
- We need to maximize end user experience to ensure adoption
- Minimizing administrative burden and process related delays is important

A Possible Solution




Service Proposal Request

Use this form to submit a request for a new proposal for your client. Select all of the services that your customer is looking for.

Client *

Enter the name of the client that this request is for

Submit

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Service Proposal Request

Use this form to submit a request for a new proposal for your client. Select all of the services that your customer is looking for.

Client *

Enter the name of the client that this request is for

Services needed by the client *

Select all of the services that the customer needs

- Service 1
- Service 2
- Service 3
- Service 4
- Service 5
- Service 6
- Service 7
- Service 8
- Service 9
- Service 10

Submit

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A Possible Solution

	Gener... Propo...	Client Name	Request Number	Submission Date	Status	Services Needed	Assigned to:	Service Lead	Date Assigned	Date Started	Date Completed	Proposal Estimate
1	<input type="checkbox"/>	<i>Acme Corp.</i>	<i>R-1049</i>	<i>08/16/24 12:15 PM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 1</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 2</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 3</div>						<i>\$0.00</i>
2	<input type="checkbox"/>	<i>Bravo Inc.</i>	<i>R-1050</i>	<i>08/19/24 11:03 AM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 2</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 8</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 9</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 10</div>						<i>\$0.00</i>
3	<input type="checkbox"/>	<i>Danny and Tean</i>	<i>R-1051</i>	<i>08/19/24 11:03 AM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 3</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 4</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 8</div>						<i>\$0.00</i>
4	<input type="checkbox"/>	<i>Echo Consulting</i>	<i>R-1052</i>	<i>08/19/24 11:03 AM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 1</div>						<i>\$0.00</i>
5	<input type="checkbox"/>	<i>Care Inc.</i>	<i>R-1053</i>	<i>08/19/24 11:03 AM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 8</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 9</div>						<i>\$0.00</i>
6	<input type="checkbox"/>	<i>Eddison Corp.</i>	<i>R-1054</i>	<i>08/19/24 11:03 AM</i>	<i>New</i>	<div style="border: 1px solid #ccc; padding: 2px;">Service 2</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 3</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 6</div> <div style="border: 1px solid #ccc; padding: 2px;">Service 8</div>						<i>\$0.00</i>

A Possible Solution

- ✔ We need to maximize end user experience to ensure adoption
- ✘ Minimizing administrative burden and process related delays is important

Another Possible Solution

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Service Proposal Request

Use this form to submit a request for a new proposal for your client of the services that your customer is looking for.

Client *

Enter the name of the client that this request is for

Submit

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Service Proposal Request

Use this form to submit a request for a new proposal for your client of the services that your customer is looking for.

Client *

Enter the name of the client that this request is for

Services needed by the client *

Select all of the services that the customer needs

- Service 1
- Service 2
- Service 3
- Service 4
- Service 5
- Service 6
- Service 7
- Service 8
- Service 9
- Service 10

Submit

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ENGAGE

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- Service 4
- Service 5
- Service 6
- Service 7
- Service 8
- Service 9
- Service 10

Submit

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Service Proposal Request

Use this form to submit a request for a new proposal for your client. Select all of the services that your customer is looking for.

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- Service 4
- Service 5
- Service 6
- Service 7
- Service 8
- Service 9
- Service 10



Submit

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Another Possible Solution

	Gener... Propo...	Client Name	Request Number	Submission Date	Status	Services Needed	Assigned to:	Service Lead	Date Assigned	Date Started	Date Completed	Proposal Estimate
1	<input type="checkbox"/>	Acme Corp.	R-1049	08/22/24 5:03 PM	New	Service 1						\$0.00
2	<input type="checkbox"/>	Acme Corp.	R-1056	08/22/24 5:04 PM	New	Service 3						\$0.00
3	<input type="checkbox"/>	Bravo Inc.	R-1050	08/22/24 5:03 PM	New	Service 2						\$0.00
4	<input type="checkbox"/>	Acme Corp.	R-1055	08/22/24 5:04 PM	New	Service 2						\$0.00
5	<input type="checkbox"/>	Bravo Inc.	R-1059	08/22/24 5:05 PM	New	Service 10						\$0.00
6	<input type="checkbox"/>	Bravo Inc.	R-1057	08/22/24 5:05 PM	New	Service 8						\$0.00
7	<input type="checkbox"/>	Bravo Inc.	R-1058	08/22/24 5:05 PM	New	Service 9						\$0.00
8	<input type="checkbox"/>	Danny and Tear	R-1051	08/22/24 5:03 PM	New	Service 3						\$0.00
9	<input type="checkbox"/>	Echo Consulting	R-1052	08/22/24 5:03 PM	New	Service 1						\$0.00
10	<input type="checkbox"/>	Care Inc.	R-1053	08/22/24 5:03 PM	New	Service 8						\$0.00
11	<input type="checkbox"/>	Care Inc.	R-1065	08/22/24 5:06 PM	New	Service 9						\$0.00
12	<input type="checkbox"/>	Danny and Tear	R-1060	08/22/24 5:05 PM	New	Service 4						\$0.00
13	<input type="checkbox"/>	Danny and Tear	R-1061	08/22/24 5:05 PM	New	Service 8						\$0.00
14	<input type="checkbox"/>	Eddison Corp.	R-1054	08/22/24 5:03 PM	New	Service 2						\$0.00
15	<input type="checkbox"/>	Eddison Corp.	R-1062	08/22/24 5:06 PM	New	Service 3						\$0.00
16	<input type="checkbox"/>	Eddison Corp.	R-1063	08/22/24 5:06 PM	New	Service 6						\$0.00
17	<input type="checkbox"/>	Eddison Corp.	R-1064	08/22/24 5:06 PM	New	Service 8						\$0.00

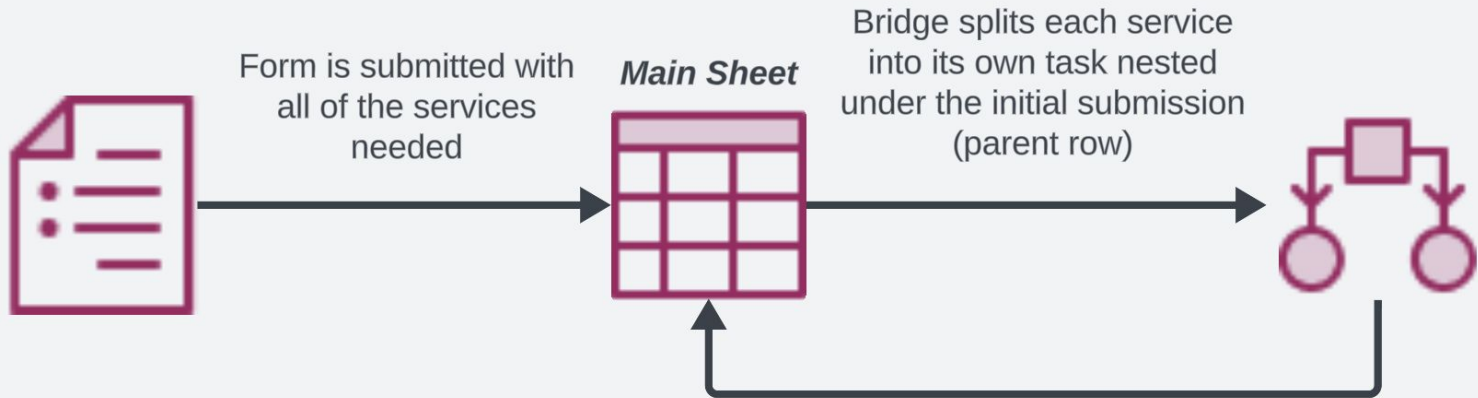
Another Possible Solution

-  We need to maximize end user experience to ensure adoption
-  Minimizing administrative burden and process related delays is important

Let's solve for both!

What will our workflow do?

Step 1



Step 1 - Define the trigger



Trigger 1

Trigger Name
Multi Select Form Trigger

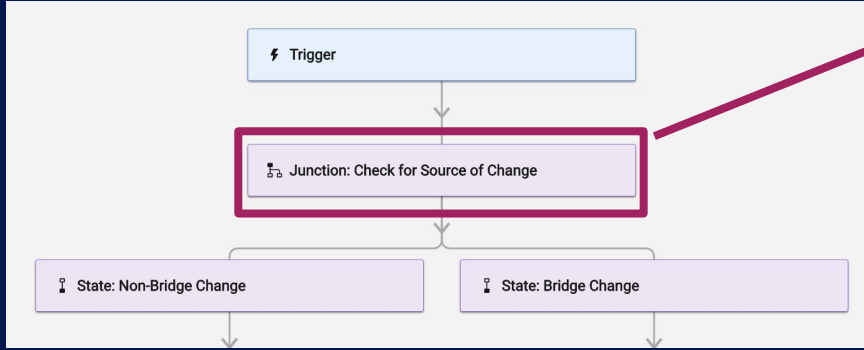
Sheet ID
504229705764740

Sheet Name
Request Capture Sheet

Event Type
When Rows Are Added

Workflow
1_Multi Select_Parent

Step 2 - Follow the correct path



Conditional Junctions

Contains

Name
Check for Source of Change

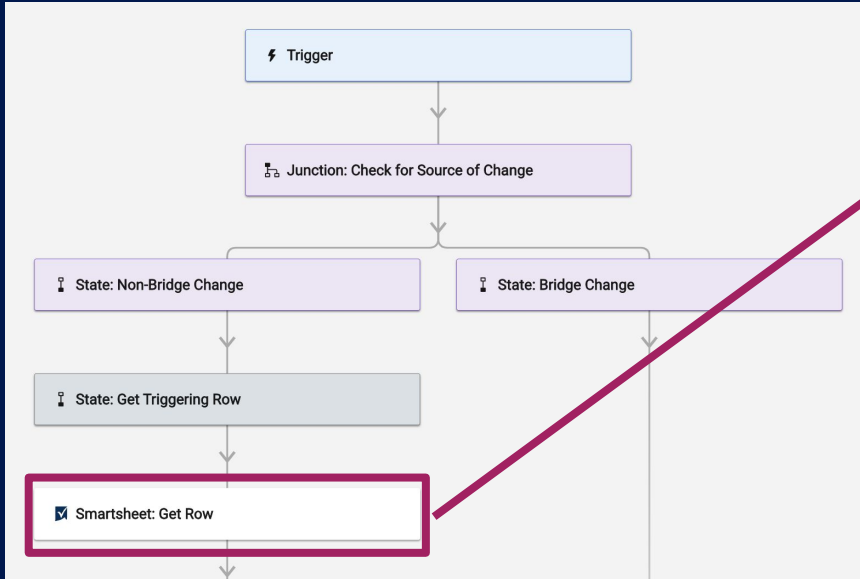
Value
{{runtime.isInternalUpdate}}

Contents
false

Trigger

- event: Object
 - eventType: created
 - id: 1439213717917572
 - objectType: row
 - timestamp: 2024-08-13T19:32:30.000+...
 - userId: 4762354262009732
 - isInternalUpdate: false
 - sheetID: 504229705764740

Step 3 - Bring in a Module



Smartsheet

Get Row

Sheet
{{runtime.sheetID}}

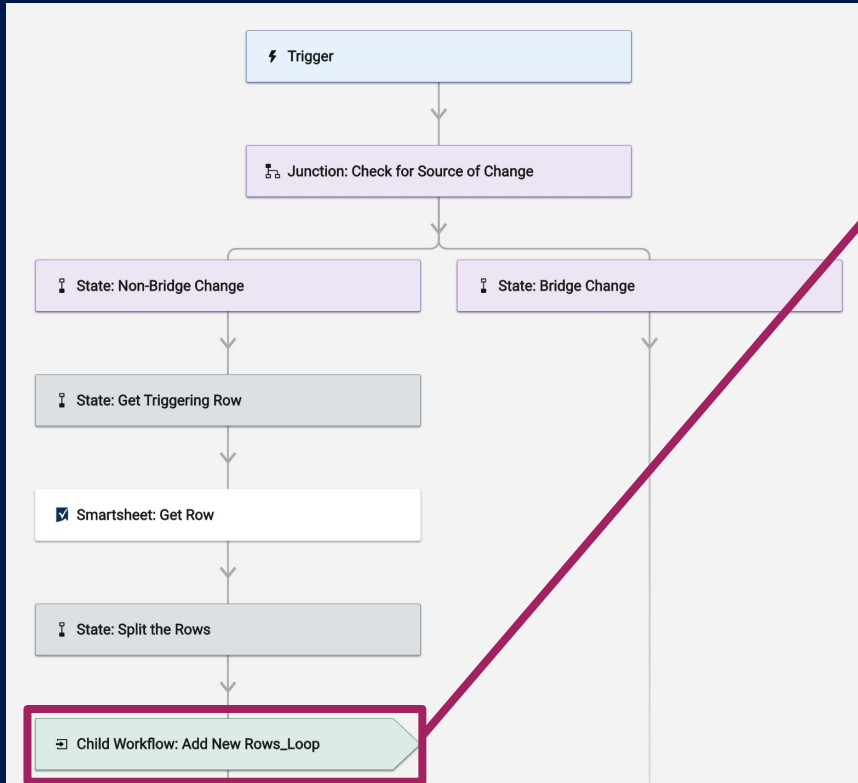
Row ID
{{runtime.event.id}}

Advanced Options

Include Additional Object Value

Includes additional information on cell values, such as with multi-select and multi-contact column cells.

Step 4 - Around and around



Add New Rows_Loop

Name
Add New Rows_Loop

Child workflow name
2_Multi Select_Child

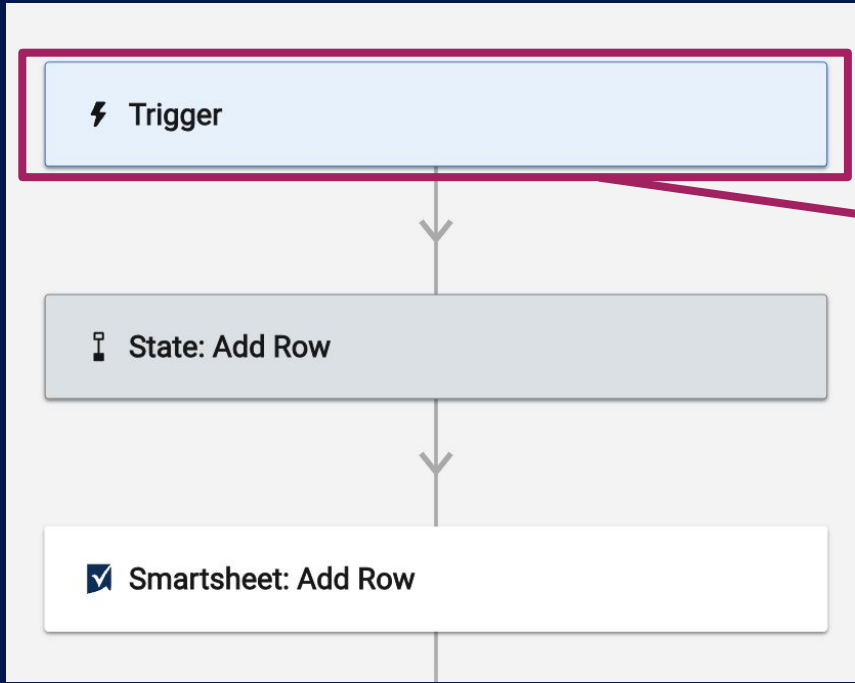
Number Of Runs
`{{states.Get Triggering Row.smartsheet.get_row.row.ce}}`

Child entity values

Remember this?

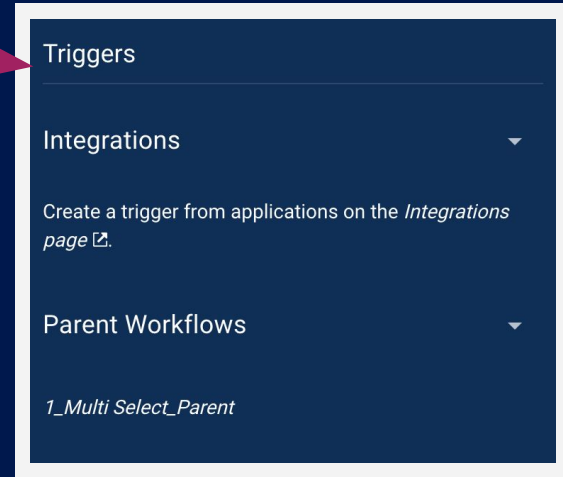
Include Additional Object Value

Step 5 - Kick off the loop

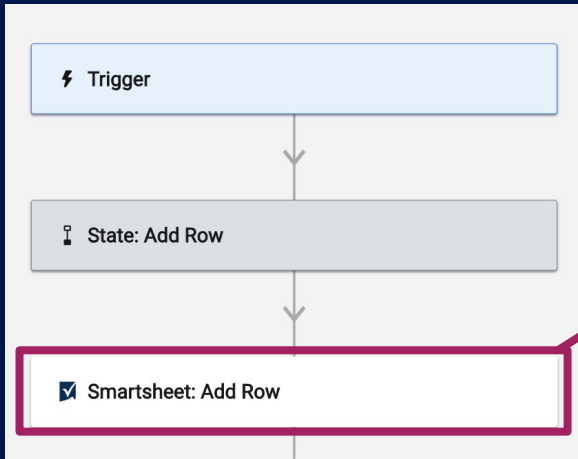


Same structure as main workflow.

It all starts with a trigger.



Step 6 - Create new rows



Location

- Top
- Bottom

Parent ID
{{runtime.parentData.event.id}}

Add Row

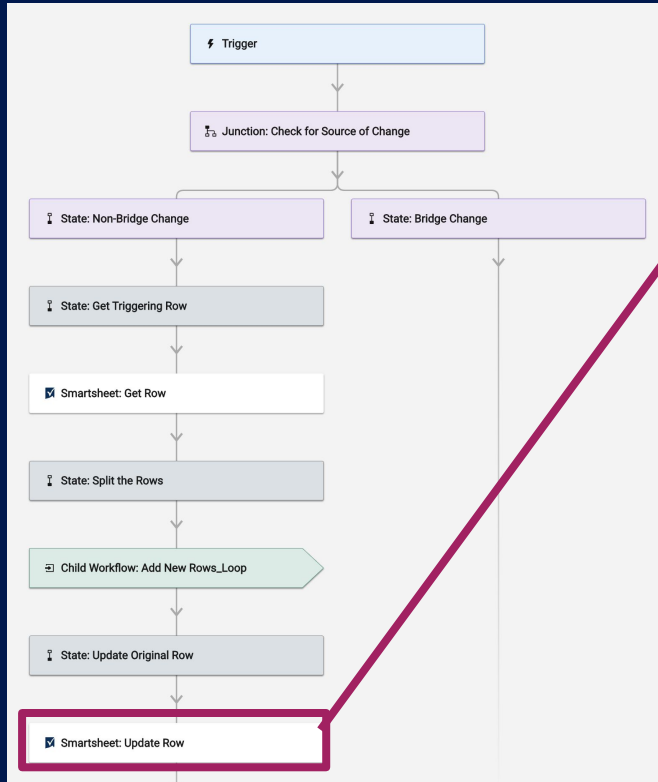
Sheet
{{runtime.parentData.sheetID}}

Cells

Key #1	Value #1
Client Name	{{runtime.entities.ParentRowC}}
Services Needed	{{runtime.data}}
Status	New

Advanced Options

Step 7 - Finishing the workflow



The configuration panel for the 'Smartsheet Update Row' action is shown. It includes the following settings:

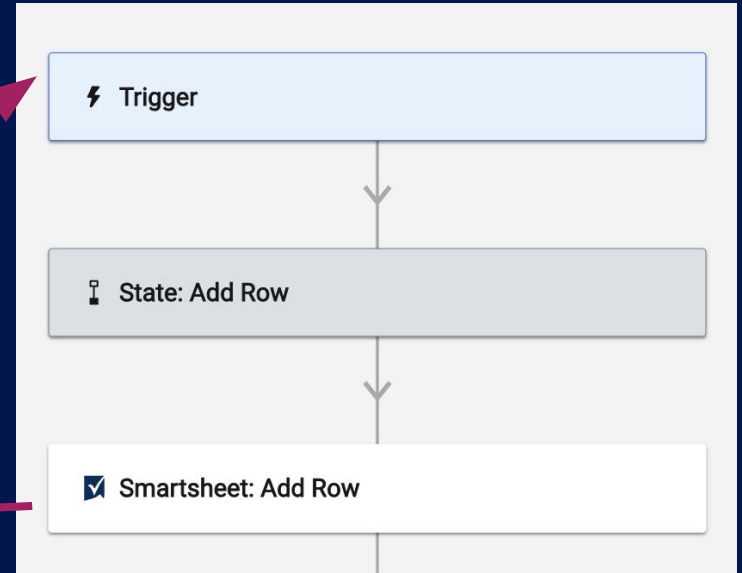
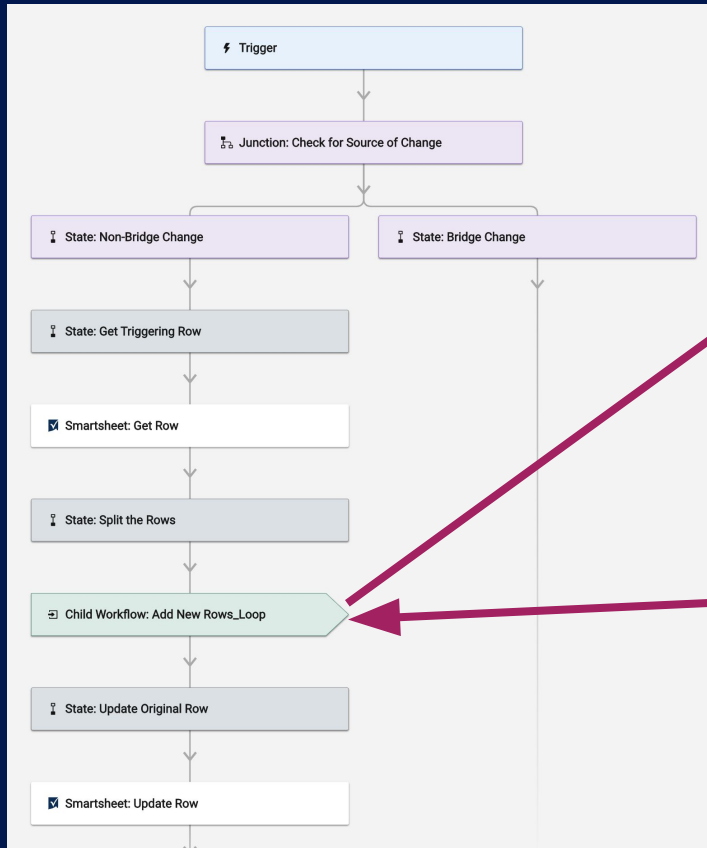
- Sheet: {{runtime.sheetID}}
- Row ID: {{runtime.event.id}}
- Column: Status
- Input Type: Value
- Value: SPLIT

The 'Advanced Options' section is expanded, showing the following settings:

- Numeric Dates
- Locked
- Expanded

The 'Locked' and 'Expanded' options are highlighted with a red box, and a red arrow points from this box back to the 'Smartsheet: Update Row' step in the workflow diagram.

Putting it all together



The result of our new workflow

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Service Proposal Request

Use this form to submit a request for a new proposal for your client. Select all of the services that your customer is looking for.

Client *

Enter the name of the client that this request is for

Engage 2024!

Services needed by the client *

Select all of the services that the customer needs

- Service 1
- Service 2
- Service 3
- Service 4
- Service 5
- Service 6
- Service 7
- Service 8
- Service 9
- Service 10

Submit

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	Gener... Propo...	Client Name	Request Number	Original Request Reference	Submission Date	Status	Services Needed	Assigned to:	Service Lead	Date Assigned	Date Started	Date Completed	Proposal Estimate
1		Engage 2024!	R-1049		08/22/24 3:53	SPLIT							\$0.00
2		Engage 2024!	R-1050	R-1049	08/22/24 3:53 PM	New	Service 2		Aviv Perez				
3		Engage 2024!	R-1051	R-1049	08/22/24 3:53 PM	New	Service 5		Bruce Fergus				
4		Engage 2024!	R-1052	R-1049	08/22/24 3:53 PM	New	Service 8		Leigh Gibbs				
5		Bronson Corp.	R-1044		08/13/24 3:32	SPLIT							\$7,500.00
6		Bronson Corp.	R-1045	R-1044	08/13/24 3:32 PM	New	Service 4		Brooklyn Jans				
7		Bronson Corp.	R-1046	R-1044	08/13/24 3:33 PM	Assigned	Service 5	Josh Jones	Bruce Fergus	08/13/24			
8		Bronson Corp.	R-1047	R-1044	08/13/24 3:33 PM	Complete	Service 6	June Taylor	Deven Games	08/13/24	08/13/24	08/13/24	\$7,500.00
9		Bronson Corp.	R-1048	R-1044	08/13/24 3:33 PM	In Progress	Service 7	Aviv Perez	Hazel Christe	08/13/24	08/13/24		
10		MBF Corp.	R-1039		08/09/24 9:20	SPLIT							\$12,000.00
11		MBF Corp.	R-1040	R-1039	08/09/24 9:20 AM	Assigned	Service 3	Hilda Wilson	June Taylor	08/13/24			
12		MBF Corp.	R-1041	R-1039	08/09/24 9:20 AM	Flagged	Service 4	Josh Jones	Brooklyn Jans	08/14/24	08/21/24		
13		MBF Corp.	R-1042	R-1039	08/09/24 9:20 AM	New	Service 5		Bruce Fergus				
14		MBF Corp.	R-1043	R-1039	08/09/24 9:20 AM	In Progress	Service 8	Josh Jones	Leigh Gibbs	08/07/24	08/13/24		\$12,000.00
15		Bravo Ventures	R-1029		08/09/24 8:34	SPLIT							\$12,500.00
16		Bravo Ventures	R-1032	R-1029	08/09/24 8:35 AM	Assigned	Service 7	Brooklyn Jan	Hazel Christe	08/09/24			\$7,500.00
17		Bravo Ventures	R-1034	R-1029	08/09/24 8:35 AM	In Progress	Service 8	Aviv Perez	Leigh Gibbs	07/29/24	08/14/24		
18		Bravo Ventures	R-1036	R-1029	08/09/24 8:35 AM	Assigned	Service 9	Josh Jones	Kiran Gupta	08/06/24			\$5,000.00
19		Acme Corp.	R-1028		08/09/24 8:34	SPLIT						08/21/24	\$82,500.00
20		Acme Corp.	R-1030	R-1028	08/09/24 8:34 AM	Complete	Service-1	Hilda Wilson	Josh Jones	08/20/24	08/13/24	08/13/24	\$7,500.00
21		Acme Corp.	R-1031	R-1028	08/09/24 8:35 AM	Complete	Service-3	Bruce Fergus	June Taylor	08/14/24	08/13/24	08/21/24	\$5,000.00
22		Acme Corp.	R-1033	R-1028	08/09/24 8:35 AM	Complete	Service-4	Aviv Perez	Brooklyn Jans	08/19/24	08/09/24	08/09/24	\$25,000.00
23		Acme Corp.	R-1035	R-1028	08/09/24 8:35 AM	Complete	Service-5	June Taylor	Bruce Fergus	07/29/24	08/09/24	08/13/24	\$10,000.00
24		Acme Corp.	R-1037	R-1028	08/09/24 8:35 AM	Complete	Service-9	Brooklyn Jan	Kiran Gupta	08/22/24	08/13/24	08/13/24	\$20,000.00
25		Acme Corp.	R-1038	R-1028	08/09/24 8:35 AM	Complete	Service-10	Bruce Fergus	Hilda Wilson	08/13/24	08/09/24	08/09/24	\$15,000.00

Did we solve the challenges

- ✔ We need to maximize end user experience to ensure adoption
- ✔ Minimizing administrative burden and process related delays is important

Recap of learnings

What did we say you should leave knowing?



Have a basic understanding of Bridge

The what, when, and why



Feel confident getting started

Understand the building block and get started with a simple yet powerful workflow

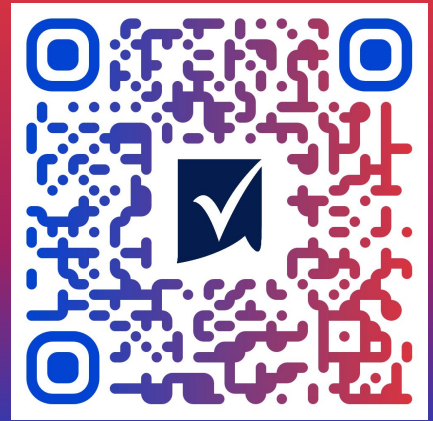


Imagination is in full swing

Head is full of ideas of how to apply this in your processes

Next steps...

- **Review** - Getting Started with Bridge Learning Track
- **Visit the Automated Workflows & Bridge Booth** - Chat with us about your use case
- **Attend SEA59Adv** - Attend to learn more about how Iron Mountain uses Bridge in their processes.
- **Attend SEA41Adv** - Automate and Scale your Portfolio
- **Attend SEA10XV**
- **Attend SEA50**



Learning Track

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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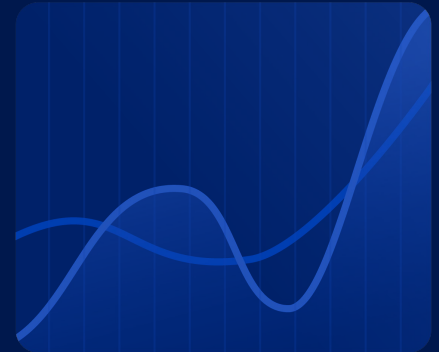
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