

 smartsheet

ENGAGE

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# Smartsheet on Smartsheet: Streamlining ENGAGE Data



Cicero



# Learning Objectives

Be able to plan/diagram a complex solution

Be able to explain how to download and upload files with Data Shuttle

Be able to create a quick and trackable way for data to enter a solution using forms

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**1**

Understanding your data  
and planning your  
workflow

**2**

Review the steps in the  
workflow

**3**

Going further

**4**

Wrap-up  
Q&A

**Let's start with the solution**




# Demo solution



# 1

## Understanding your data and planning your workflow





**“ Give me six hours to chop  
down a tree and I will  
spend the first four  
sharpening the axe. ”**

**Abraham Lincoln**

# Where to start



**Review the data**



**Determine what you  
need on the  
dashboard**



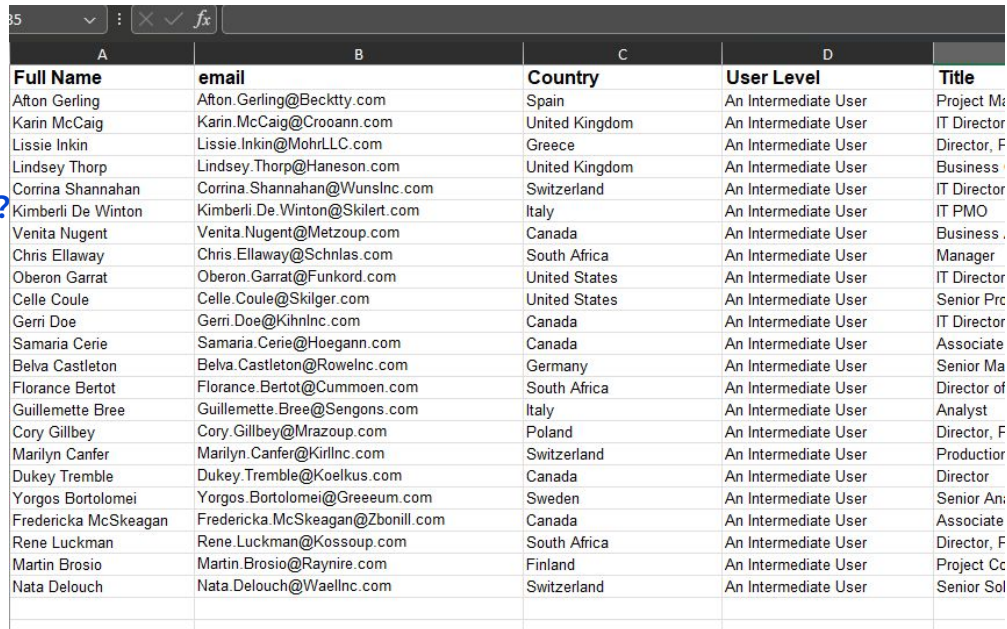
**Identify missing  
data**



**Draw out the  
workflow**

# Review the data

- What data and columns will you need, and how will data be captured?
- On what schedule will you receive data?
- How will you receive the data?
- Is there any way to automate?




A	B	C	D	
Full Name	email	Country	User Level	Title
Afton Gerling	Afton.Gerling@Beckty.com	Spain	An Intermediate User	Project M
Karin McCaig	Karin.McCaig@Crooann.com	United Kingdom	An Intermediate User	IT Director
Lissie Inkin	Lissie.Inkin@MohrLLC.com	Greece	An Intermediate User	Director, F
Lindsey Thorp	Lindsey.Thorp@Haneson.com	United Kingdom	An Intermediate User	Business
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Kimberli De Winton	Kimberli.De.Winton@Skilert.com	Italy	An Intermediate User	IT PMO
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Guillemette Bree	Guillemette.Bree@Sengons.com	Italy	An Intermediate User	Analyst
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Martin Brosio	Martin.Brosio@Raynire.com	Finland	An Intermediate User	Project Cc
Nata Delouch	Nata.Delouch@WaelInc.com	Switzerland	An Intermediate User	Senior Sol



# Identify missing data

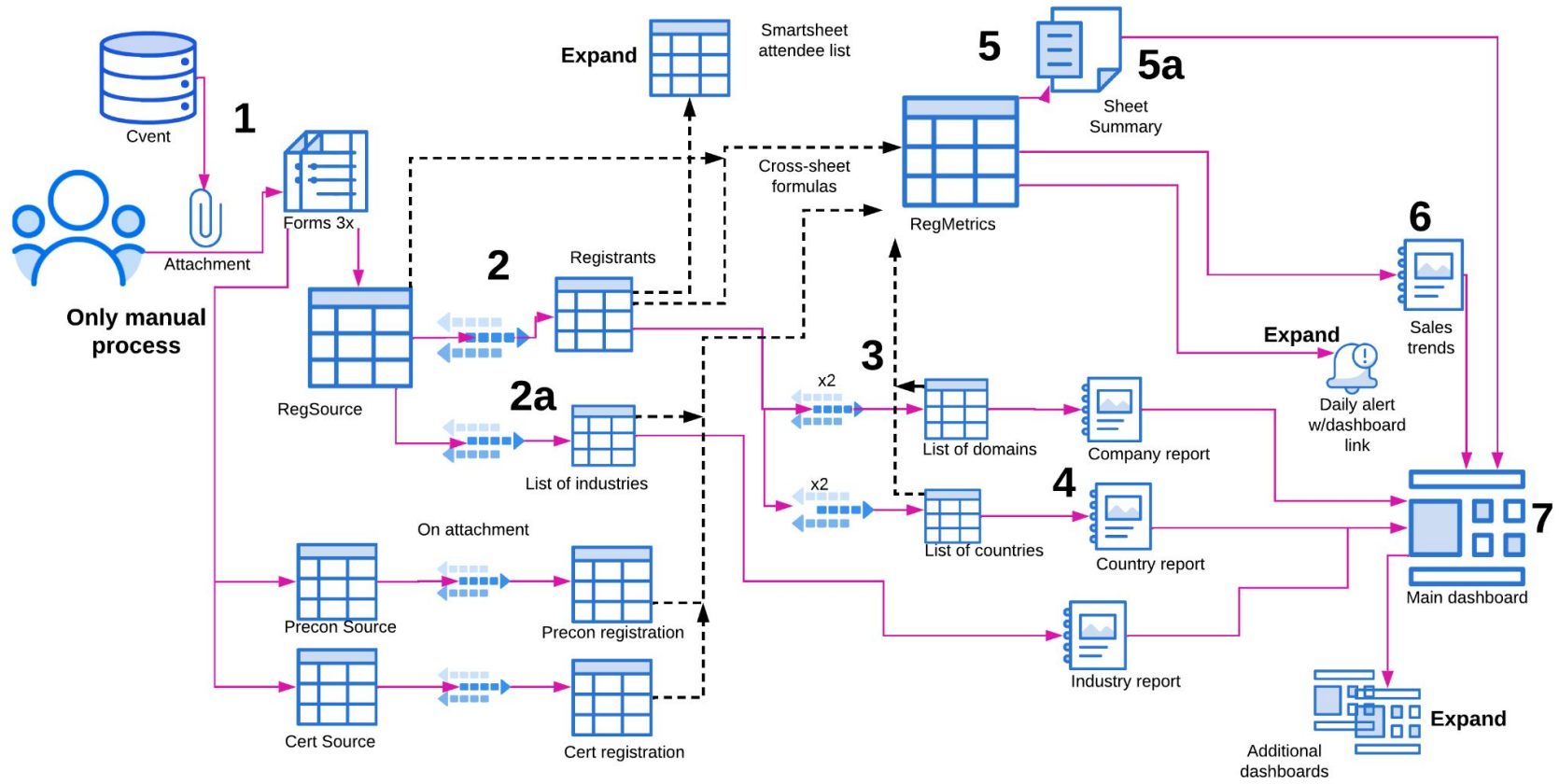
- Does it require modification in the data feed?
- Will this require additional data from somewhere else?
- Will this require calculated metrics?
- Where should those metrics be located?

Registrants ☆



	Domain fx	Date Registered	Amount Paid	SysAdmin Cert fx	Core Product Cert fx	Prod fx
	Becktty.com	01/29/24	650			
	Crooann.com	01/29/24	650		Core Product Cert	
ations	MohrLLC.com	01/29/24	550			
ations	Haneson.com	01/29/24	550			
duction	Wunslnc.com	01/29/24	650			
	Skilert.com	01/30/24	900		Core Product Cert	
	Metzoup.com	01/30/24	650			

# Draw out the workflow



# 2

**Review the steps in the workflow**



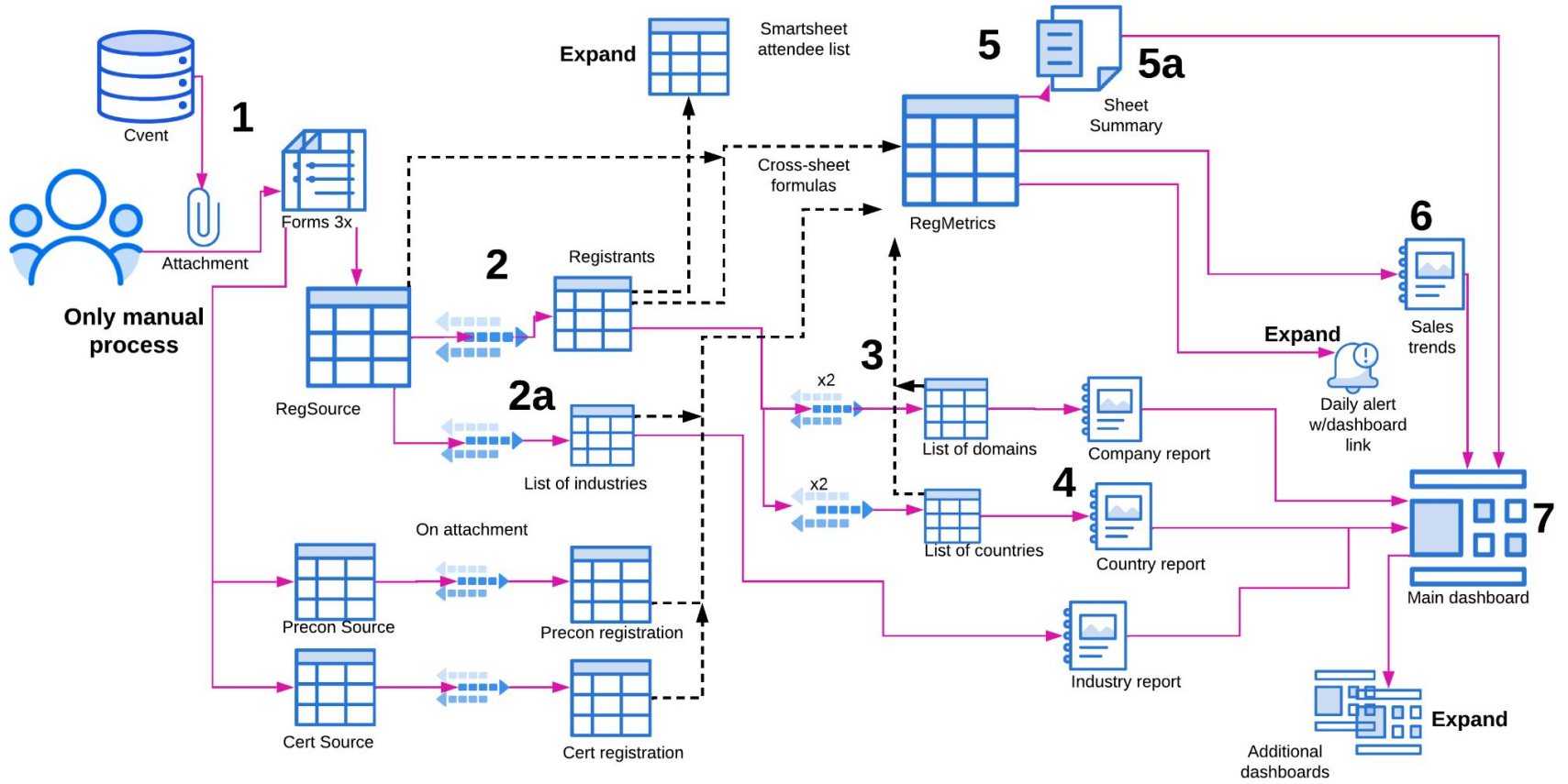


# List of assets

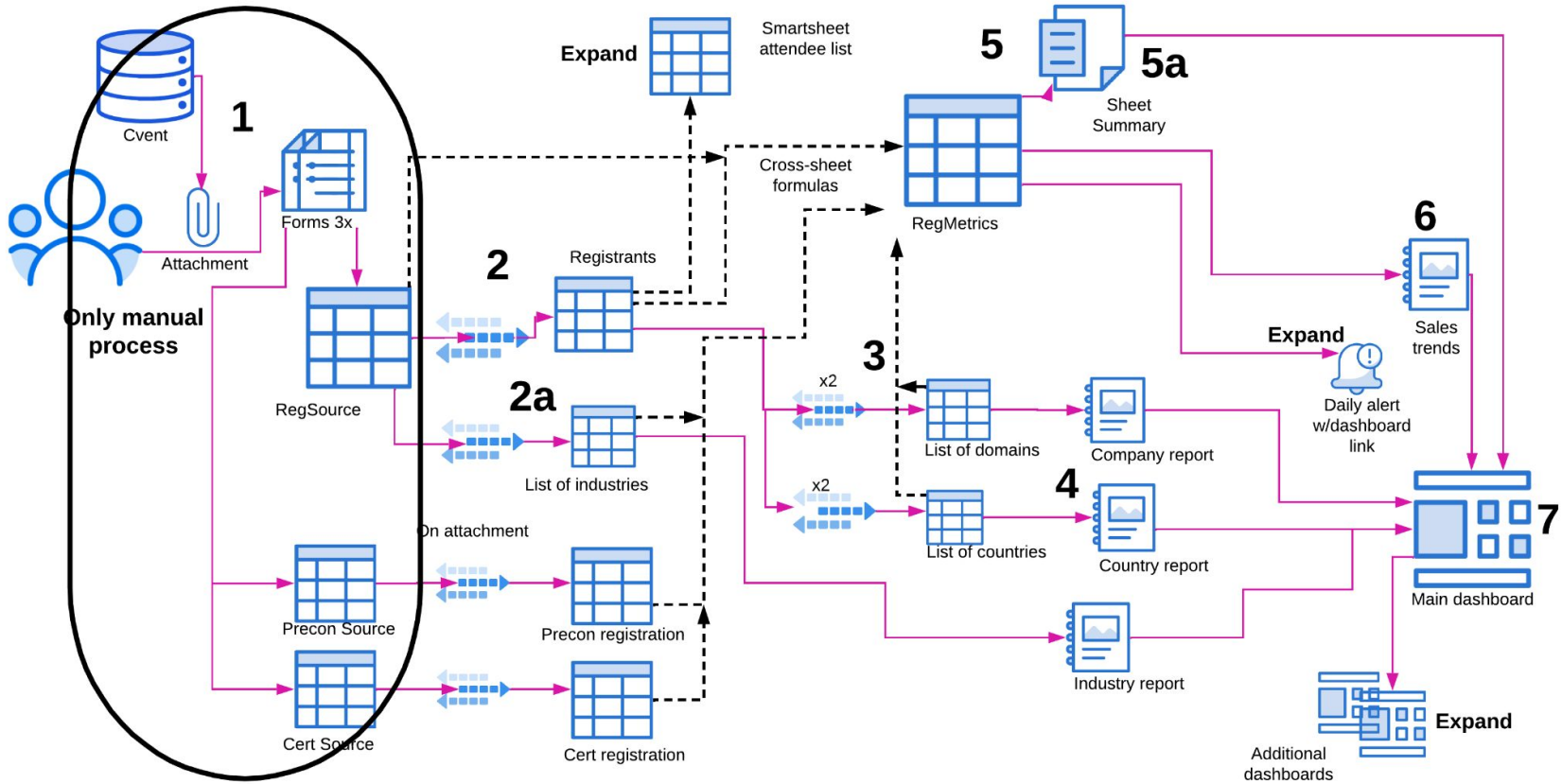
- 12 sheets
  - 3 sheets with forms
  - 1 sheet for explanation of solution
- 4 reports
- 1 dashboard
- 6 Data Shuttle upload workflows
- 2 Data Shuttle offload workflows

- ▼ Training/Cert
  - Cert Registration
  - Cert Source
  - Precon Registration
  - Precon Source
  - Copy of Complete Data
  - Country Report
  - Domain Report
  - Explanation Sheet
  - Industry Report
  - List of Countries
  - List of Domains
  - List of Industries
  - Registrants
  - Registration Example
  - RegMetrics
  - RegSource
  - Sales Trends

# Workflow in steps



# Step 1















# Step 1: Bring the data into your solution



- **RegSource sheet**
  - Add 'Date Created' and 'Created By' columns
  - Form attached
    - 'Primary Column' with default "New Data"
    - Attachment field
    - Enable - **Require Smartsheet login to access this form**
- **Cert Source sheet**
  - Same configuration as above
- **Precon Source sheet**
  - Same configuration as above

Create shortcuts on your desktop with the links to access the forms quickly when uploading data.



File Automation Forms Connections Dynamic View  RegSource 

    |  Grid View  Filter |   | Arial  10 

		Primary Column	Date Created	Created By
1		New Data	03/03/24 11:34 AM	john.cicero@demo.mbfc
2		New Data	03/03/24 12:58 PM	john.cicero@demo.mbfc
3				
4				

## RegSource

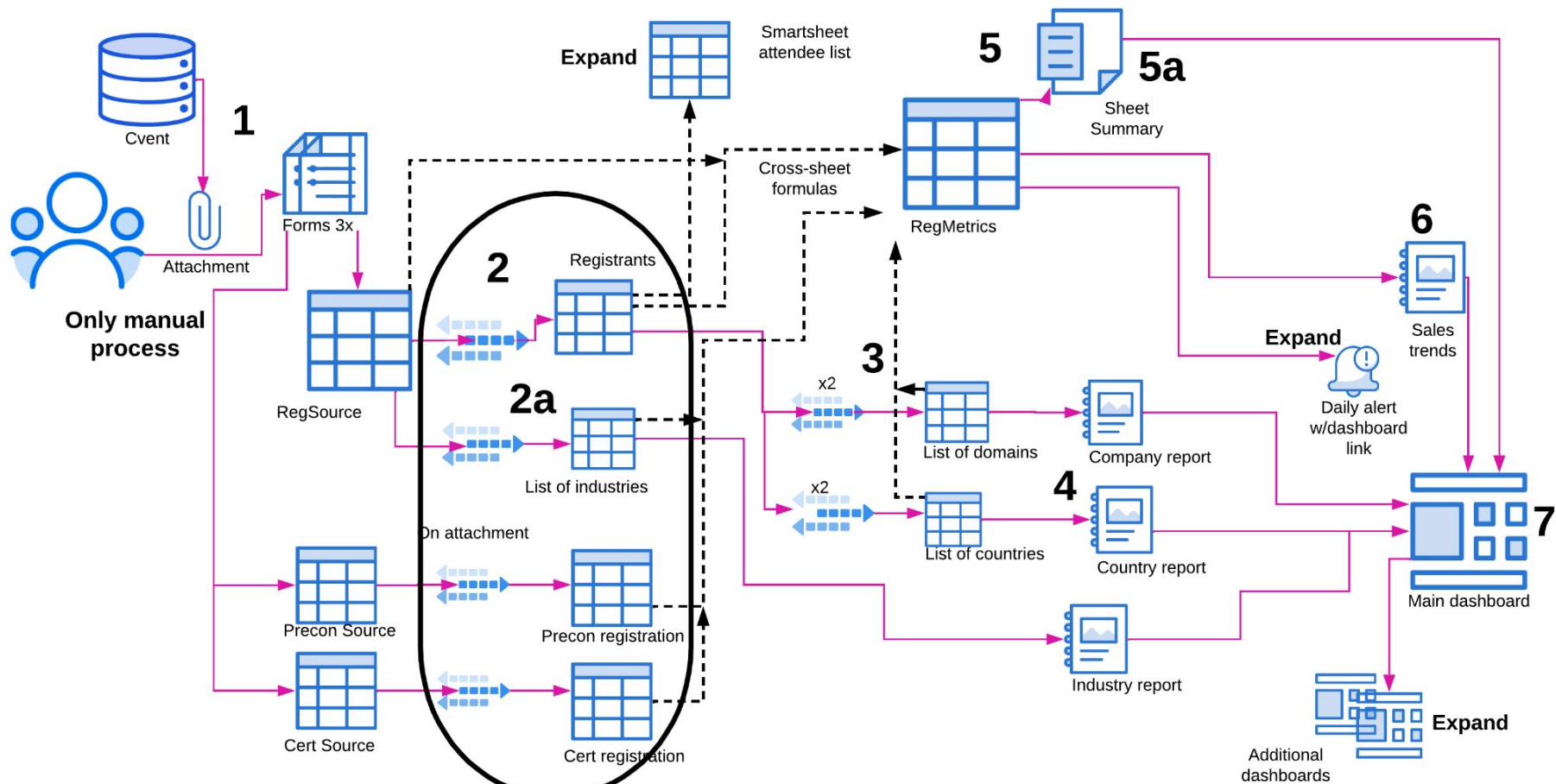
**Primary Column**

**File Upload**

Drag and drop files here or [browse files](#)

Send me a copy of my responses

# Steps 2 and 2a



# Step 2: Data Shuttle uploads - 3 workflows

- Start by creating each sheet below by importing the first downloaded file from Cvent
- Upload to Registrants sheet
  - Mapping should be straightforward because you created the sheet from an upload.
  - Run on attachment from the source sheets.
- Upload to Cert Registration sheet
  - Same configuration as above; just change target to Cert Registration sheet and source to Cert Source
- Upload to Precon Registration sheet
  - Same configuration as above; just change target to Precon Registration sheet and source to Precon Source.

Data Shuttle

My workflows

Archive Refresh Search Workfl

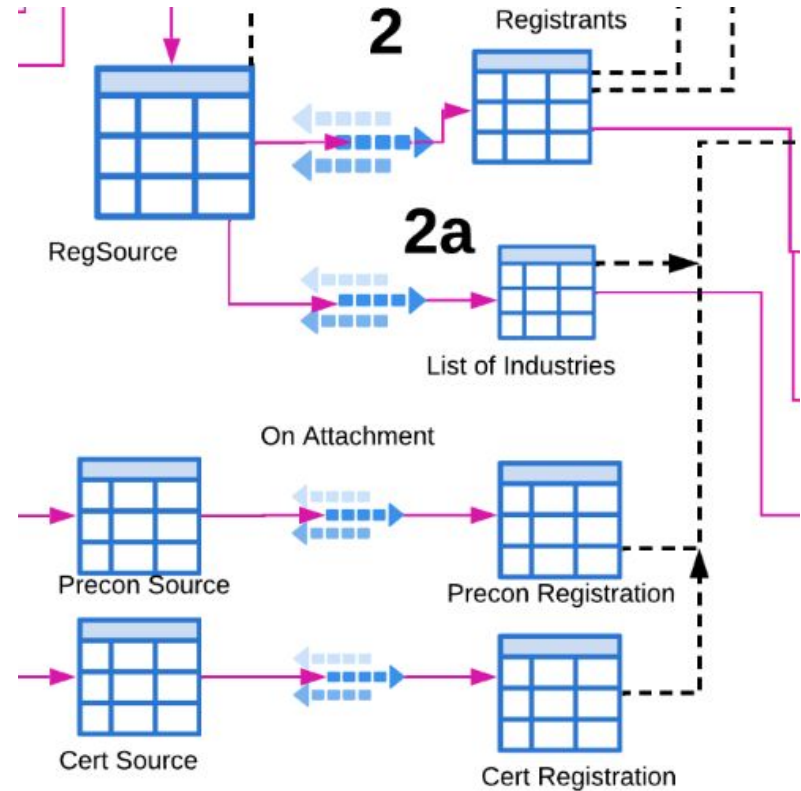
All workflows Upload workflows Offload workflows

<input type="checkbox"/>	Workflow name ↑	Source	Action	Target	Last run	Workflow type
<input type="checkbox"/>	Download Countries	Registrants	Replace	List of Countries	✓ 04 Mar 2024 15:0	Offload ⌚
<input type="checkbox"/>	Download Domains	Registrants	Replace	List of Domains	✓ 04 Mar 2024 15:0	Offload ⌚
<input type="checkbox"/>	Update Certification Regi	Cert Source	Replace	Cert Registration	✓ 03 Mar 2024 12:5	Upload 🔗
<input type="checkbox"/>	Update Domains List	List of Domains	Add & Delete	List of Domains	✓ 04 Mar 2024 15:0	Upload 🔗
<input type="checkbox"/>	Update Industries	RegSource	Add & Delete	List of Industries	✓ 03 Mar 2024 12:5	Upload 🔗
<input type="checkbox"/>	Update List of Countries	List of Countries	Add & Delete	List of Countries	✓ 04 Mar 2024 15:0	Upload 🔗
<input type="checkbox"/>	Update Precon Training	Precon Source	Replace	Precon Registrati...	✓ 03 Mar 2024 12:5	Upload 🔗
<input type="checkbox"/>	Update Registrations	RegSource	Replace	Registrants	✓ 03 Mar 2024 12:5	Upload 🔗

Note: All titles of Upload Workflows begin with "Update." All titles of Download Workflows begin with "Download."

# Step 2: Data Shuttle details

- **Source**
  - There will be 3 Data Shuttle **uploads**, one for each of the source sheets.
  - Will be from “Most recent” attachment.
- **Target**
  - Target sheets will be the one corresponding to the source Sheets.
  - “Replace all” makes sure there are no issues with unique identifiers.
- **Filters**
  - Filters are not used in this example.
- **Mapping**
  - Mapping are directly across because the initial sheets were from imports of the first data. There will possibly be columns in the target that are not mapped to because they are formula columns for missing data
- **Run options**
  - These will run on attachment
- **Expressions**
  - Expressions aren’t necessary.
- **Name**
  - Name as it makes sense to you.





# Step 2a: Data Shuttle upload

- Create only two columns in the List of Industries sheet
  - Create the 'Industries' and 'Number in Industry' columns before setting up this workflow.
  - Create cross-sheet formulas to COUNTIF industries are in the 'Registrants' sheet.
  - See screenshots below for steps in Data Shuttle.
- This list comes from the attachment of Cvent files to the RegSource sheet.
- Use 'Industries' as the Unique Identifier Column.
- Map only the 'Industry' column
- Run on attachment from RegSource
- The list will grow as new industries appear in the registration download

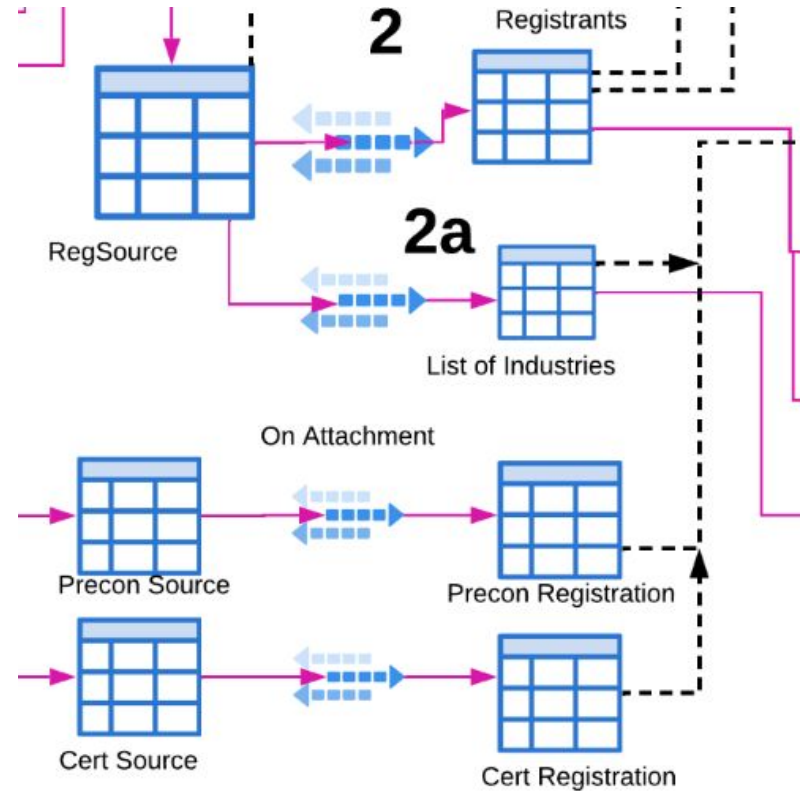
Grid View Filter Arial 10

Primary Column	Industries	Number In Industry fx
	Retail	14
	Life Sciences	27
	Telecommunications	12
	Media and Production	12
	Nonprofit	16
	Consumer Goods	9
	Architecture, Constructi	10
	Technology	9
	Education	15
	Manufacturing	12
	Entertainment	11
	Government	10
	Healthcare	6
	Finance	6
	Professional Services	4
	Energy and Utilities	5
	Environmental	7
	Other	6

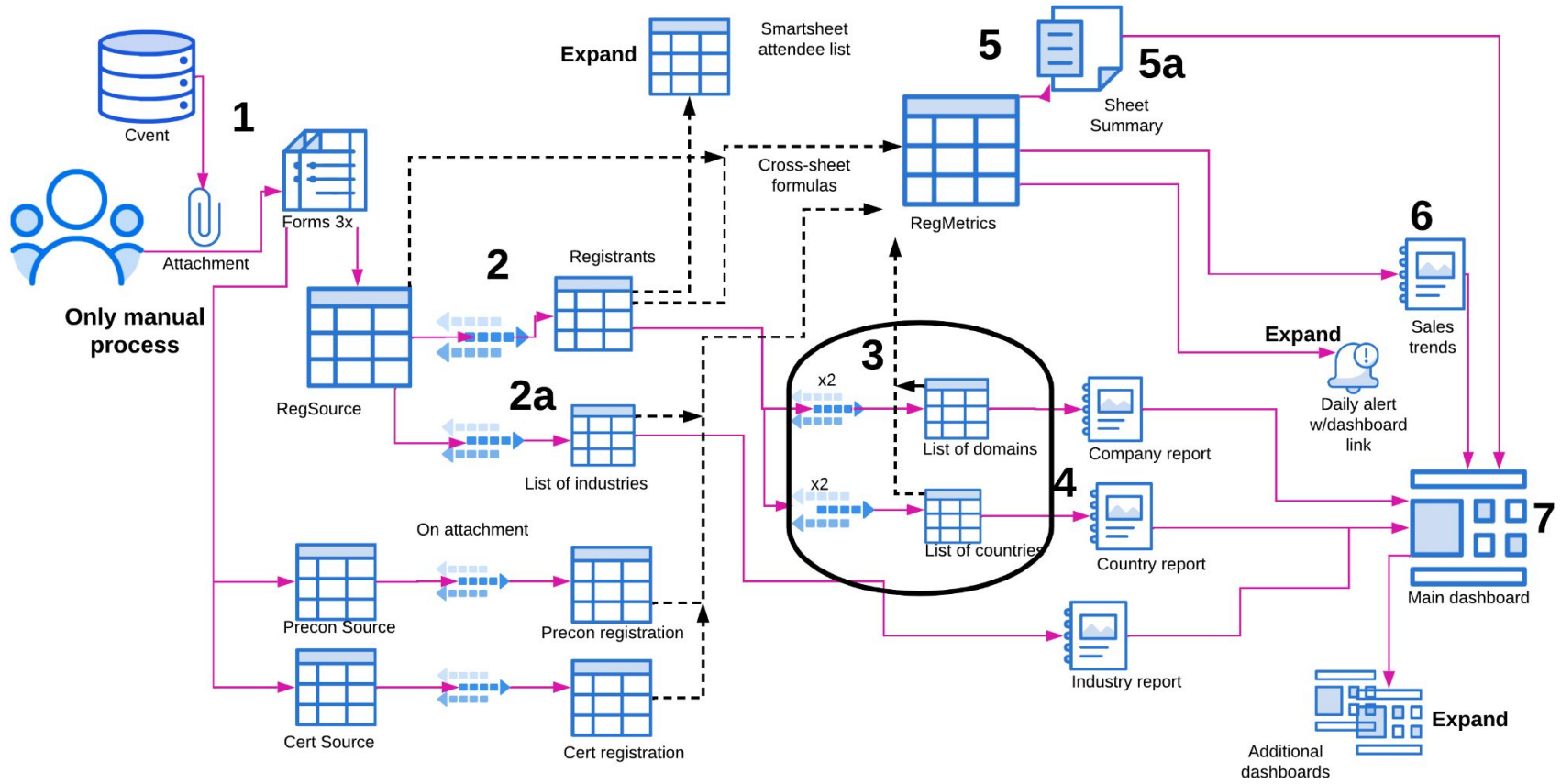


# Step 2a: Data Shuttle details

- **Source**
  - This is also coming from the same attachment that triggers the Registrants upload in the RegSource sheet
  - Will be from “Most recent” Attachment
- **Target**
  - Target sheets will be ‘List of Industries’ sheet
  - This will Merge data and Add New data and Delete data that no longer exists
- **Filters**
  - No Filters used in this example
- **Mapping**
  - This uses the ‘Industries’ as the Unique Identifier
  - Only the Industries will be mapped
- **Run options**
  - These will run on attachment
- **Expressions**
  - No Expressions needed
- **Name**
  - Name as it makes sense to you



# Step 3



# Step 3: Domain and Countries List sheets - Offload

- Domain is data not found in reports.
  - Column-level formulas are in 'Registrants' sheet.
- Countries are separated to filter those from internal attendees.
- Scheduled download to pull domains and countries.
  - Two separate Data Shuttle workflows
  - These workflows put the attachments on the 'List of Domains' sheet and 'List of Countries' sheet respectively
  - Need only two columns per sheet
  - Map only the one column per workflow

Dynamic View  **Registrants** 

Filter Off   | Arial  10  **B**  *I*  U       

 **Registrants** 

  | Arial  10  **B**  *I*  U    

Industry	Domain	Date Registered	Amount Paid
	<i>f<sub>x</sub></i>		
Retail	Becktty.com	01/29/24	650
Life Sciences	Croa...	01/29/24	650
Telecommunications	Mohr...	01/29/24	650
Telecommunications	Hane...	01/29/24	650
Media and Production	WunsInc.com	01/29/24	650

*f<sub>x</sub>* =RIGHT(email@row, LEN(email@row) - FIND("@", email@row))

Used in formula on: [List of Domains](#)

	Country	Customer/Partner Country	User Level	Title
cktty.com	Spain	Spain	An Intermediate User	Project Manager
ooan...	United Kingdom	United Kingdom	An Intermediate User	IT Director
LLC.				
anes...	United Kingdom	United Kingdom	An Intermediate User	Business Oper...

*f<sub>x</sub>* =IF(OR([Registration Path]@row = "Customer", [Registration Path]@row = "Partner"), Country@row, "")

Used in formula on: [List of Countries](#)

# Step 3: Domain and Countries List Sheets - Upload

- Triggered by attachment of the 'Domain' and 'Countries Offload' workflows.
- Set to update the lists as new items are added, or remove ones that are no longer in list.

## Select your target sheet

For update dropdowns workflows, select a sheet that you have admin that you have editor or higher access to.

Select target

Sheet

List of Domains

### Workflow action

- Replace all Target sheet rows with the data from the input file
- Merge data into the target based on a key column value
- Update the dropdown choices for the selected columns

### Row options

- Add rows to the sheet as they are added to the source file
- Update rows as they change in the source file
- Delete rows that no longer match the filter criteria

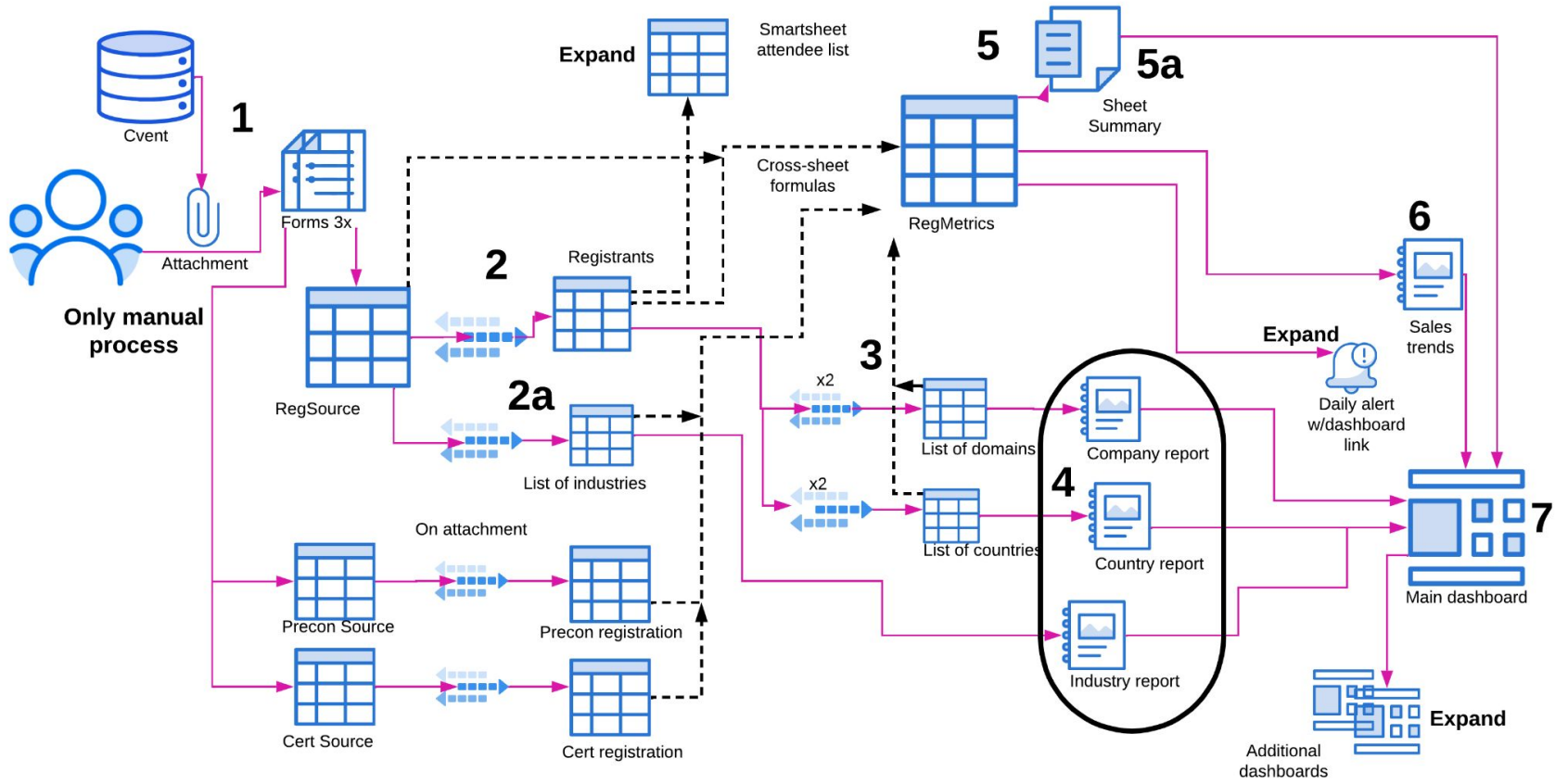
Filter | <=> | Arial | 10

Domains	Number In Domains
Becktty.com	1
Crooann.com	2
MohrLLC.com	1
Haneson.com	1
WunsInc.com	2
Skilert.com	1
Metzoup.com	1
Schnlas.com	1
Funkord.com	2
Skilger.com	2
Kihlnc.com	2

Filter | <=> | Arial | 10

Countries	Number from Country
Spain	8
United Kingdom	11
Greece	16
Switzerland	13
Italy	13
Canada	17
South Africa	18
United States	20
Germany	10

# Step 4



# Step 4: Reports

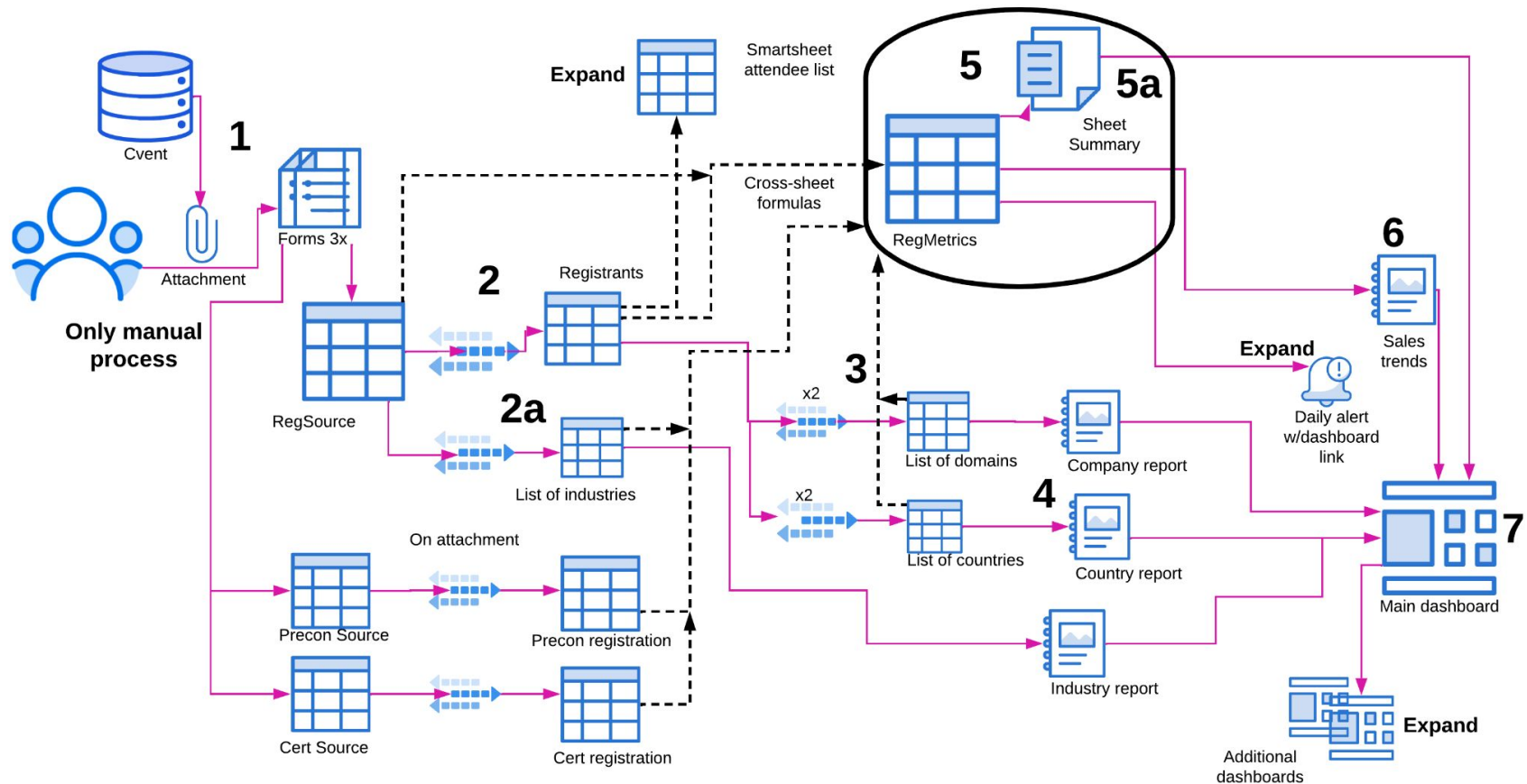
- **Country report**
  - Uses the 'List of Countries' sheet
  - Primary column is hidden
  - Will update as new data is added to the List Sheet
  - Used in the chart of countries on the dashboard
- **Industry report**
  - Same configuration as above
- **Domain report**
  - Same configuration as above

: View Country Report ☆

Grid View C 15

Countries	Number from Country
Spain	8
United Kingdom	11
Greece	16
Switzerland	13
Italy	13
Canada	17
South Africa	18
United States	20
Germany	10
Poland	9
Sweden	14
Finland	12
Norway	10

# Steps 5 and 5a





# Step 5: RegMetrics sheet

- **Aggregates daily registrations**
  - Used in sales trends report
  - Is the hub for all metrics used in the dashboard
  - See 5a for details on Sheet Summary formulas
- **Aggregates comp codes that are used**
- **Aggregated user levels**
  - Used for user-level chart on dashboard

Forms Connections Dynamic View

RegMetrics ☆

Grid View Filter | Arial | 10 | B I U | | | | |

Date	Total Registrations	Customer and Partner Registration	Comp Registration	Internal Registrati...	Revenue	Tickets Remaining	Blank	Additional Metrics	Add Data
🔒	f <sub>x</sub>	f <sub>x</sub>	f <sub>x</sub>	f <sub>x</sub>	f <sub>x</sub>				
01/28/24	0	0	0	0	\$0.00	700		<b>Comps</b>	
01/29/24	5	5	0	0	\$3,050.00	695		Community	3
01/30/24	4	4	0	0	\$2,650.00	691		Partner 1	0
01/31/24	4	4	0	0	\$2,550.00	687		Partner 2	0
02/01/24	10	10	0	0	\$5,500.00	677			
02/02/24	8	8	0	0	\$4,750.00	669			
02/03/24	0	0	0	0	\$0.00	669		<b>User Levels</b>	
02/04/24	0	0	0	0	\$0.00	669		An Advanced User	22
02/05/24	8	8	0	0	\$5,500.00	661		A Beginning User	27
02/06/24	4	4	0	0	\$2,300.00	657		An Intermediate User	142



# Step 5: Formulas and Explanations

- **Total Registrations**

- Cross-sheet formula to the Registrants sheet
- Uses the 'Date' column to filter in the formula
- Made a column-level formula
- Note: Cross-sheet reference is sheet and column

- **Customer and Partner Registration**

- Subtracts the Internal Registrations from the total above
- Made a column-level formula

- **Comp Registration**

- Cross-sheet formula to the Registrants sheet
- Uses the 'Date' column to filter in the formula
- Collects only the cells that have comp codes for that date
- Made a column-level formula
- Note: Cross-sheet reference is sheet and column

Total Registrations	Customer and Partner Registration	Comp Registration	Internal Registrations
$f_x$	$f_x$	$f_x$	$f_x$
0	0	0	0

$f_x = \text{COUNTIF}(\{\text{Registrants Date}\}, \text{Date@row})$   
Edit reference:  $\{\text{Registrants Date}\}$

Total Registrations	Customer and Partner Registration	Comp Registration	Internal Registrations	Revenue
$f_x$	$f_x$	$f_x$	$f_x$	$f_x$
0	0	0	0	0

$f_x = [\text{Total Registrations}]@row - [\text{Internal Registrations}]@row$

Customer and Partner Registration	Comp Registration	Internal Registrations	Revenue	Tickets Remaining	Blank
$f_x$	$f_x$	$f_x$	$f_x$		
0	0	0	\$0.00	700	

$f_x = \text{COUNT}(\text{COLLECT}(\{\text{Registrants Comp Code}\}, \{\text{Registrants Date}\}, \text{Date@row}))$   
Edit reference:  $\{\text{Registrants Comp Code}\}$   
 $\{\text{Registrants Date}\}$

# Step 5: Formulas and Explanations

- **Internal Registration**

- Cross-sheet formula to the Registrants sheet
- Uses the 'Date' column to filter in the formula and counts the number of "Staff"
- Made a column-level formula
- Note: Cross-sheet reference is sheet and column

- **Revenue**

- Adds all revenue for each date row
- Made a column-level formula
- Registrations with comp codes do not have a revenue number on their row

	Total Registrations	Customer and Partner Registration	Comp Registration	Internal Registrati...	Revenue	Tickets Remaining	Blank
	f_x	f_x			f_x		
'24	0	0	0	0	\$0.00	700	
'24	5	5	0	0	\$2,050.00	695	
'24	f_x = COUNT(COLLECT({Registrants Reg Path}, {Registrants Reg Path}, "Staff", {Registrants Date}, Date@row))						
'24	Edit reference: {Registrants Reg Path}						
'24	{Registrants Date}						
'24	10	10	0	0	\$5,500.00	677	

Comp Registration	Internal Registrati...	Revenue	Tickets Remaining	Blank
f_x	f_x	f_x		
0	0	\$0.00	700	
0	0	\$2,050.00	695	
f_x = SUM(COLLECT({Amount Paid}, {Registrants Date}, Date@row))				
Edit reference: {Amount Paid}				
{Registrants Date}				

# Step 5: Formulas and explanations

- **Tickets Remaining**

- Leveraging a Sheet Summary field to subtract from
- Use the \$ absolute value to always start at the first row and sum to the row it is on.

The screenshot shows a Smartsheet interface with a table. The table has columns: 'Customer and Partner Registration', 'Comp Registration', 'Internal Registrati...', 'Revenue', 'Tickets Remaining', 'Blank', 'Additional Metrics', and 'Add Data'. A formula is entered in the 'Tickets Remaining' column for the 'Comps' row. The formula is: `=([Starting Tickets])# - (SUM([Customer and Partner Registration]$1:[Customer and Partner Registration]@row))`. The formula bar is highlighted with a blue border.

- **Comps**

- Uses a cross-sheet formula to count each of the comp codes that are used.
- Could also use a COUNTIF

The screenshot shows a Smartsheet table with columns: 'Comps', 'Community', and 'Partners'. A formula is entered in the 'Community' column. The formula is: `=COUNT(COLLECT({[Registrants Range 5]}, [Registrants Range 5], [Additional Metrics]@row))`. The formula bar is highlighted with a blue border.

- **User levels**

- Uses a cross-sheet formula to count each User Level and aggregates them

The screenshot shows a Smartsheet table with columns: 'User Levels', 'An Advanced User', and 'A Decision User'. A formula is entered in the 'An Advanced User' column. The formula is: `=COUNTIF([Registrants Range 6], [Additional Metrics]@row)`. The formula bar is highlighted with a blue border.



# Step 5a: RegMetrics sheet - Sheet Summary

- Aggregates data from multiple sheets to make it easier to add as metric widgets in the dashboard
- Sheet Summary data takes advantage of a number of cross-sheet formulas

## Sheet Summary ? x

Starting Tickets

700

Last Updated *fx*

03/05/24 SI

Total Registered *fx*

657

Customer/Partner Registered *fx*

608

Internal Registered *fx*

49

Comp Registered *fx*

6

Percent to Sellout *fx*

87%

Tickets Remaining *fx*

# Step 5a: Sheet Summary formulas for each field

- **Starting Tickets**
  - Fixed number but used in Sheet Summary in case they decide to change it or use it for some other calculation.
- **Last Updated**
  - Uses the MAX function and uses a cross-sheet formula to look at the 'Date Created' column in the RegSource sheet. Will update each time new data is submitted
- **Total Registered**
  - Aggregates from the column in the RegMetrics sheet
- **Customer/Partner Registered**
  - Subtracts total from Internal Sheet Summary fields

## Sheet Summary

Starting Tickets

700

Last Updated *fx*

03/05/24

Last Updated *fx*

```
=MAX({RegSource Date Created})
```

Total Registered *fx*

657

Total Registered *fx*

```
=SUM([Total Registrations]:[Total Registrations])
```

Customer/Partner Registered *f*

608

Customer/Partner Registered *fx*

```
= [Total Registered]# - [Internal Registered]#
```

# Step 5a: Sheet Summary formulas for each field

- **Internal Registered**
  - Aggregates the 'Internal Registration' column on the sheet
- **Comp Registered**
  - Aggregates the 'Comp Registration' column
- **Percent to Sellout**
  - Using two other Summary fields
- **Tickets Remaining**
  - Using two other Summary fields
- **Total Revenue**
  - Aggregates Revenue Column

Internal Registered *fx*

49

Internal Registered *fx*

=SUM([Internal Registration]:[Internal Registration])

Comp Registered *fx*

6

Comp Registered *fx*

=SUM([Comp Registration]:[Comp Registration])

Percent to Sellout *fx*

87%

Percent to Sellout *fx*

=([Customer/Partner Registered]# / [Starting Tickets]#)

Tickets Remaining *fx*

92

Tickets Remaining *fx*

=([Starting Tickets]# - [Customer/Partner Registered]#)

Total Revenue *fx*

\$376,400.00

Total Revenue *fx*

=SUM([Revenue:Revenue])

# Step 5a: Sheet Summary formulas for each field

- **ENGAGE Date**
  - Fixed date used to calculate countdown to ENGAGE
- **Days left to ENGAGE**
  - Uses the TODAY function and fixed date from above
- **Precon Total**
  - Aggregates Summary fields that are aggregating the precon registrations
- **Intro to CWM**
  - COUNTIF to count number registered for session
- **Control Center Training**
  - COUNTIF to count number registered for session

## ENGAGE Date

05/14/24



## Days Left to ENGAGE *fx*

70

## Days Left to ENGAGE *fx*

=[ENGAGE Date]# - TODAY()

## Precon Total *fx*

34

## Precon Total *fx*

=[Intro to CWM]# + [Control Center Training]#

## Intro to CWM *fx*

8

## Intro to CWM *fx*

=COUNTIF([Registrants Precon Training], "Intro to Collaborative Work Management")

## Control Center Training *fx* Control Center Training *fx*

26

=COUNTIF([Registrants Precon Training], "Unlocking Control Center")



# Step 5a: Sheet Summary formulas for each field

- **Total Certs**
  - Aggregating from the individual cert fields
- **Core Cert**
  - Cross-sheet formula to COUNT all in the column from the Registrants sheet
- **Admin Cert**
  - Cross-sheet formula to COUNT all in the column from the Registrants sheet
- **PM Cert**
  - Cross-sheet formula to COUNT all in the column from the Registrants Sheet
- **Control Center Lead Cert**
  - Cross-sheet formula to COUNT all in the column from the Registrants Sheet

Total Certs *fx*

73

Total Certs *fx*

```
= [Core Cert]# + [Admin Cert]# + [PM Cert]# + [Control Center Lead Cert]#
```

Core Cert *fx*

18

Core Cert *fx*

```
=COUNT({Registrants Core Product Cert})
```

Admin Cert *fx*

15

Admin Cert *fx*

```
=COUNT({Registrants SysAdmin Cert})
```

PM Cert *fx*

16

PM Cert *fx*

```
=COUNT({Registrants ProdMgt Cert})
```

Control Center Lead Cert *fx*

24

Control Center Lead Cert *fx*

```
=COUNT({Registrants Control Center Lead Cert})
```

# Step 5a: Sheet Summary formulas for each field

- **Number of Domains Attending**
  - Cross-sheet formula counting the list of domains that are in the List of Domains sheet
  
- **Number of Countries Represented**
  - Cross-sheet formula counting the list of countries that are in the List of Countries sheet
  
- **Number of Industries Represented**
  - Cross-sheet formula counting the list of industries that are in the List of Industries sheet

Number of Domains Attending *fx*

344

Number of Domains Attending *fx*

=COUNT((List of Domains Domains Column))

Number of Countries Represented *fx*

14

Number of Countries Represented *fx*

=COUNT((List of Countries Countries))

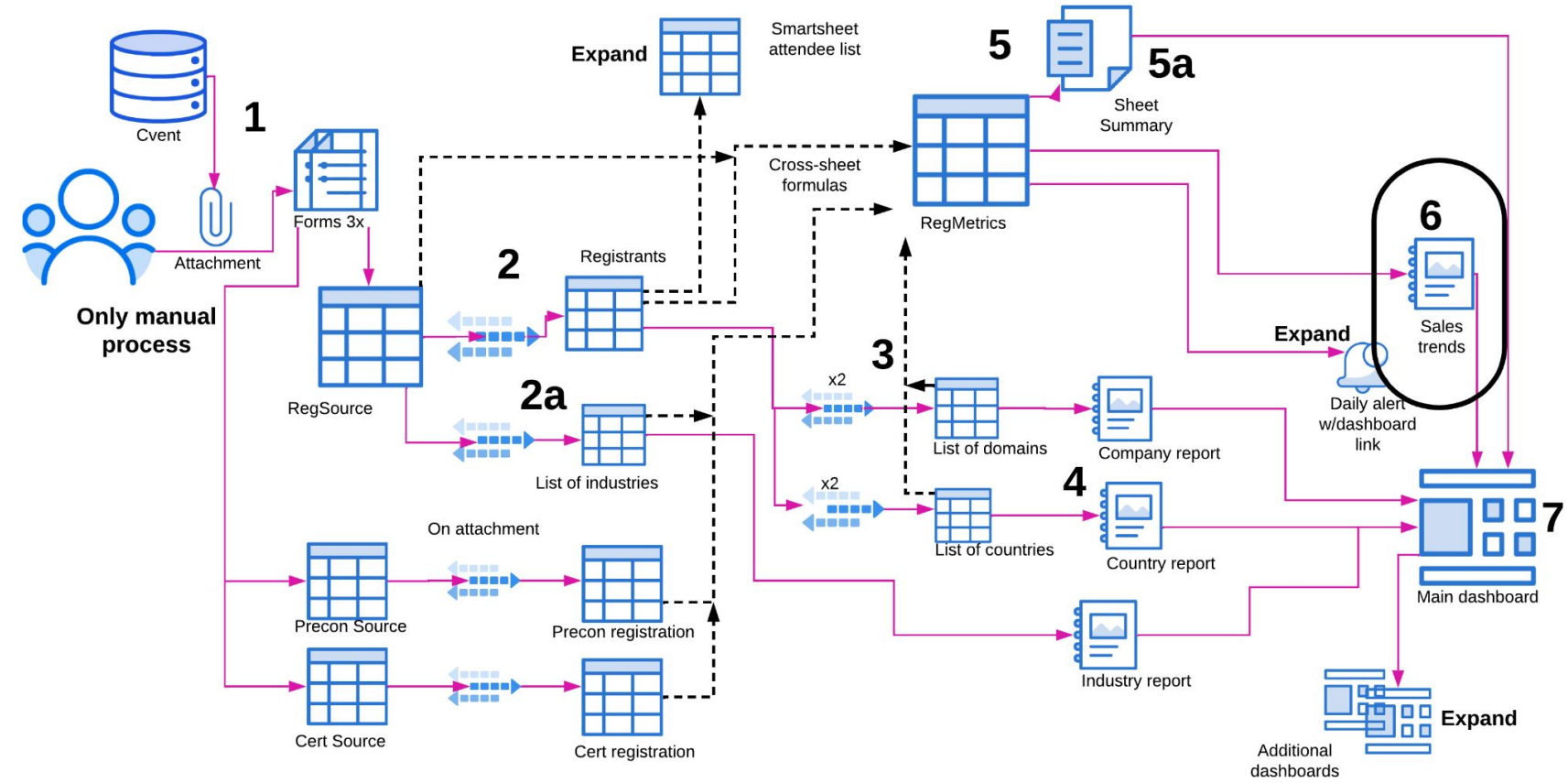
Number of Industries Represented *fx*

18

Number of Industries Represented *fx*

=COUNT((List of Industries Industries))

# Step 6



# Step 6: Sales Trends report

- Report is built from data in the 'RegMetrics' sheet
  - Filter is set to only show those rows in the past or today
  - Report is used in the chart on the main dashboard
  - Report and associated chart will grow with time

View

 **Sales Trends** ☆

 |  Grid View ▾ |  |  |  1 Sheet |  2 Columns |  1 Filter

Date	Customer and Partner Registration
01/29/24	5
01/30/24	4
01/31/24	4
02/01/24	10
02/02/24	8
02/05/24	8
02/06/24	4
02/07/24	9
02/08/24	8
02/09/24	9
02/12/24	5
02/13/24	7

 **Sales Trends** ☆

 1 Sheet |  2 Columns |  2 Filters |  Group |  Summarize |  Sort

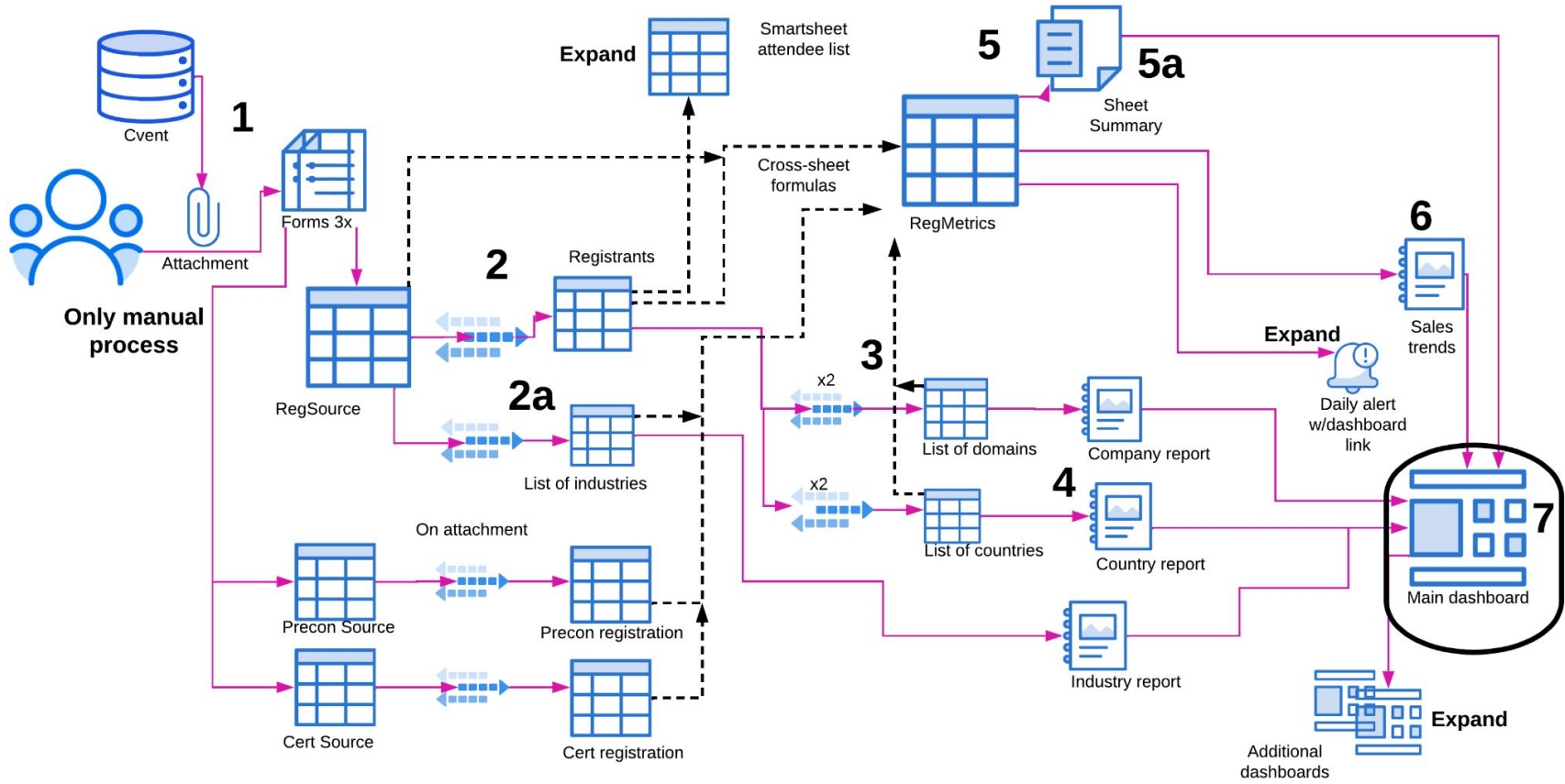
Date ▾ is in the past ▾

Date ▾ is today ▾

Or

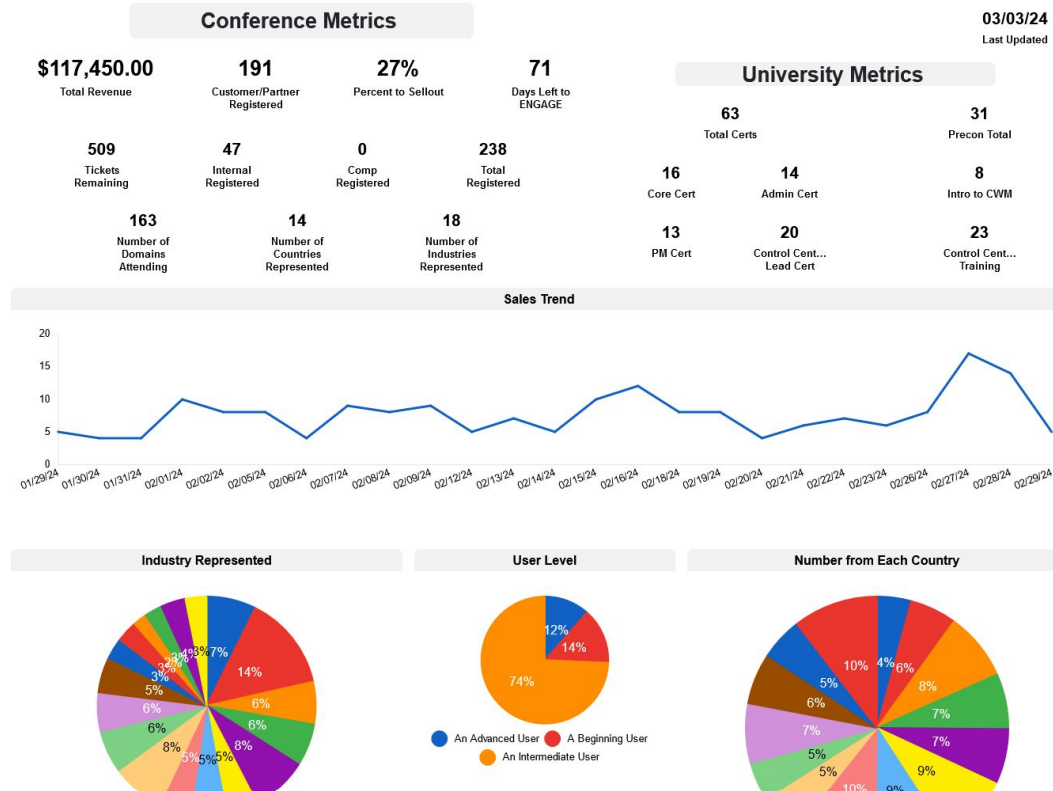
+ Add a Condition

# Step 7



# Step 7: Main dashboard

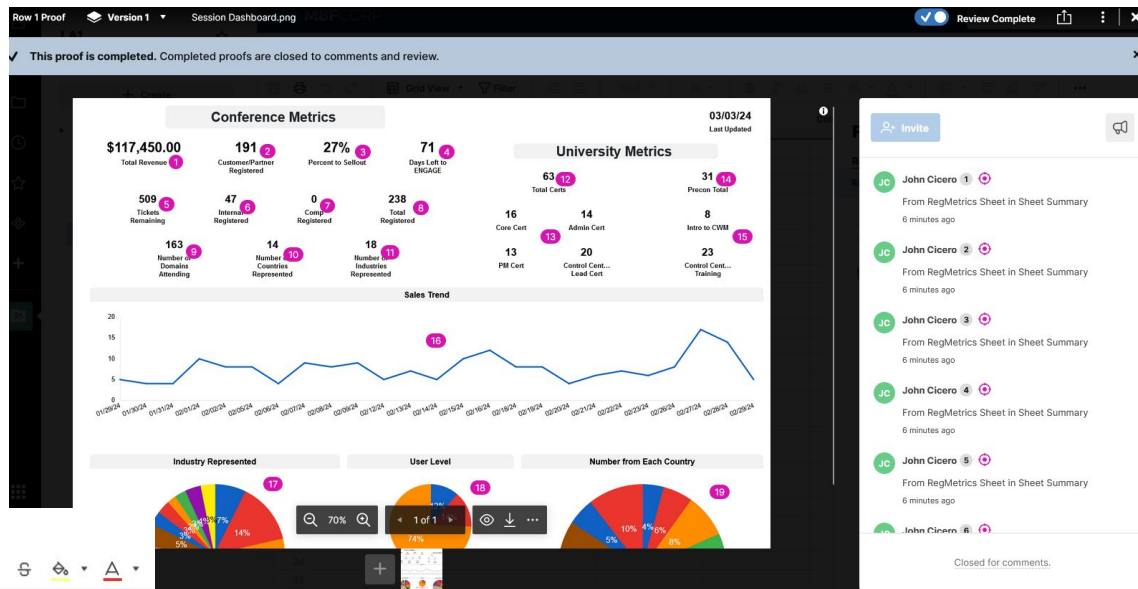
- Updates any time new data is uploaded into any of the three source sheets



# Explanation sheet

## Explanation sheet

- Leverage proofing to get feedback on the report but also to explain where all of the metrics and charts are from.
- Use this during your planning and to capture information at the end.
- Leverage 'Proof Info' columns to capture who has approved the dashboard or other changes.
- Capture versions of your dashboard and materials.
- Make it part of your solution assets.**



file Automation Forms Connections Dynamic View **Explanation** ☆

Grid View Filter Arial 10 B I U

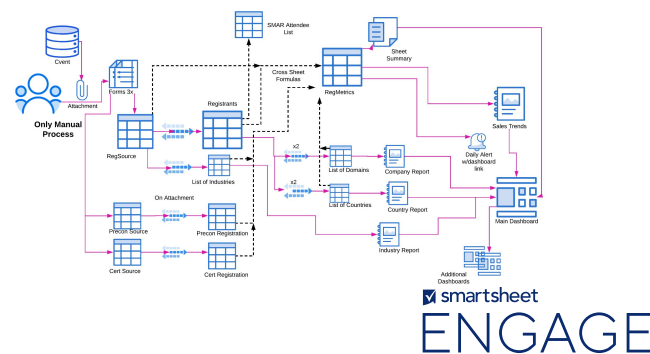
	Primary Column	Version	Approved By
1	Dashboard Layout	1	John Cicero
2	Solution Workflow	1	John Cicero
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

## Proofs

Row All

Sort by Date

- Solution Workflow
  - Row 2 V1
  - 03/05/24, 4:36 PM by .
- Dashboard Layout
  - Row 1 V1
  - 03/05/24, 4:16 PM by .



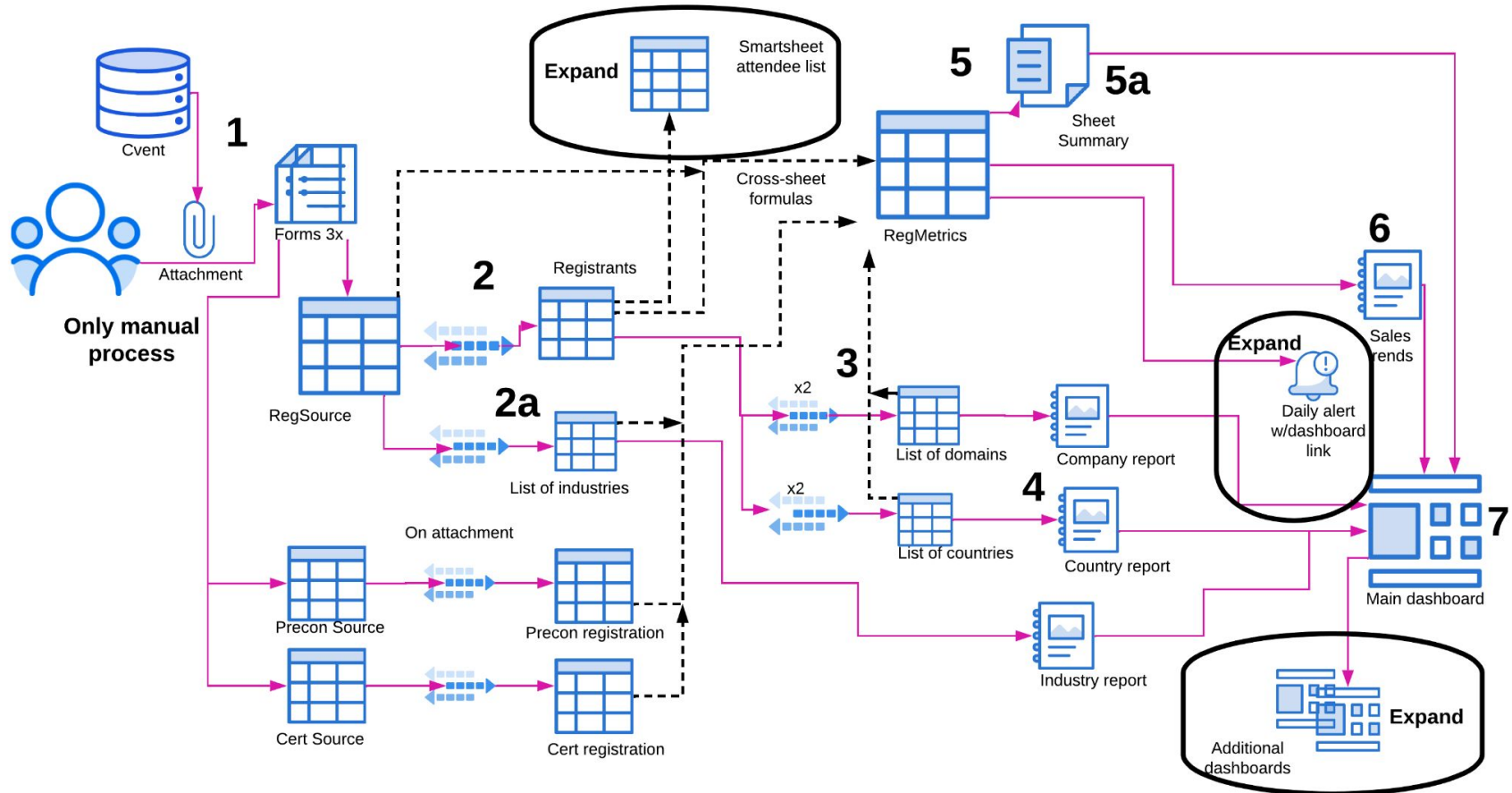
# 3

**Review the steps in the workflow**





# Expand on your solution



# Expand: What else could we do?

- **Track Smartsheet attendee registrations automatically.**
  - Use cross-sheet formulas to help track when your internal people have registered automatically so you don't have to ask them or look anything up.
- **Create an alert that sends the dashboard link.**
  - Create an alert automation on the 'RegSource' sheet so that every time there is a new upload (new row), an alert will go out to your senior leadership.
- **Copy dashboard widgets.**
  - Dashboard widgets can be copied and pasted to other dashboards in your organisation that need only a few of the metrics that are on your main dashboard.
  - They will all update real time!
- **Use Control Center to roll this entire solution out for each of your events.**
- **Put this all in a WorkApp so each role sees when they need to do their job.**

# Learning Objectives

Be able to plan/diagram a complex solution

Be able to explain how to download and upload files with Data Shuttle

Be able to create a quick and trackable way for data to enter a solution using forms

# 4

## Wrap-up Q&A



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

# Next steps...

- Dashboards and Charts
  - Dashboard Design: Building Engaging, User-Centric Dashboards
  - Smartsheet charts unpacked: Elevate your dashboard game
- Formulas
  - Unlock precision data retrieval with INDEX, MATCH, and COLLECT
  - Advanced power-user tips to up-level your Smartsheet experience
- Check out the booths in the Experience Hub to learn so much more

## 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.

 smartsheet

# ENGAGE

# Share your experience at ENGAGE

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



@smartsheet



@smartsheetplatform



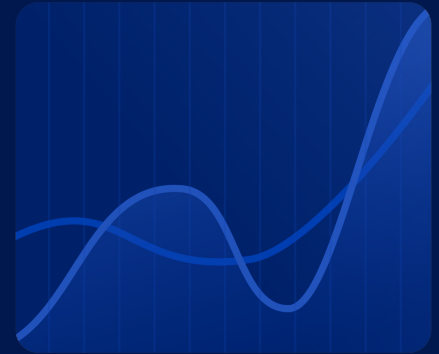
@smartsheet



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