![smartsheet]

Phase Integration between Resource Management and Smartsheet

Welcome to EAP!

Your participation in the Early Adopter Program is greatly appreciated, and we can't wait to see how the **Phase Integration between Resource Management and Smartsheet** will empower you.
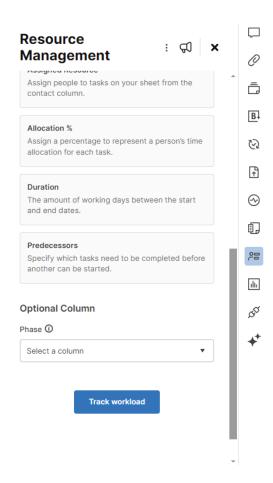
The following pages contain all the insights and resources you'll need to explore this new feature. We value your feedback and insights as early adopters, and we look forward to hearing your thoughts on how this feature can benefit your workflow and drive your success.
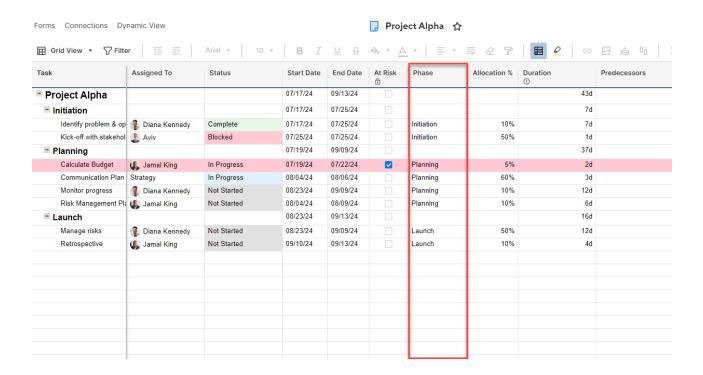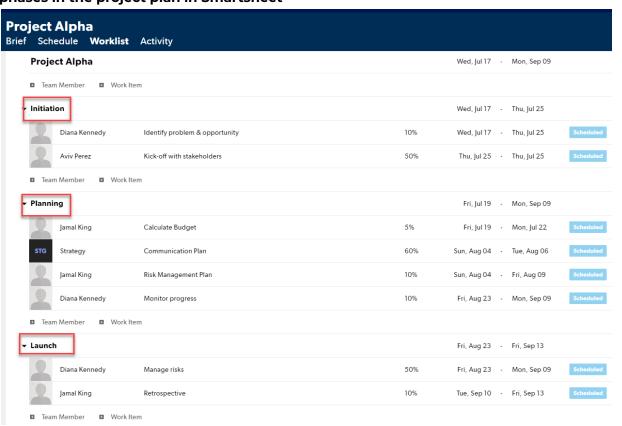
What is Phase Integration between Resource Management and Smartsheet?

The phase integration between Resource Management (RM) and Smartsheet ensures that project phases in your Smartsheet project sheet and resource management project plan stay synchronized. This feature enables users to track time and generate detailed reports for different **project phases** within Resource Management.
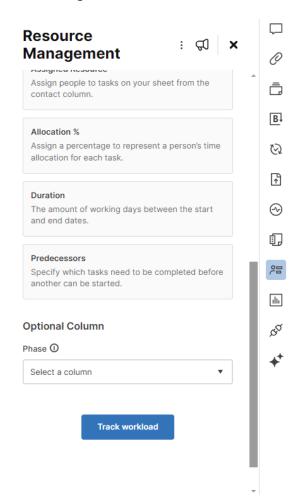
📄 Project Alpha ☆

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Task	Assigned To	Status	Start Date	End Date	At Risk 🔒	Phase	Allocation %	Duration ⓘ	Predecessors
⊟ **Project Alpha**			07/17/24	09/13/24	☐			43d	
⊟ **Initiation**			07/17/24	07/25/24	☐			7d	
Identify problem & op	👤 Diana Kennedy	Complete	07/17/24	07/25/24	☐	Initiation	10%	7d	
Kick-off with stakehol	👤 Aviv	Blocked	07/25/24	07/25/24	☐	Initiation	50%	1d	
⊟ **Planning**			07/19/24	09/09/24	☐			37d	
Calculate Budget	👤 Jamal King	In Progress	07/19/24	07/22/24	☑	Planning	5%	2d	
Communication Plan	Strategy	In Progress	08/04/24	08/06/24	☐	Planning	60%	3d	
Monitor progress	👤 Diana Kennedy	Not Started	08/23/24	09/09/24	☐	Planning	10%	12d	
Risk Management Pla	👤 Jamal King	Not Started	08/04/24	08/09/24	☐	Planning	10%	6d	
⊟ **Launch**			08/23/24	09/13/24	☐			16d	
Manage risks	👤 Diana Kennedy	Not Started	08/23/24	09/09/24	☐	Launch	50%	12d	
Retrospective	👤 Jamal King	Not Started	09/10/24	09/13/24	☐	Launch	10%	4d	

As you can see the project phases in Resource Management are the same as the project phases in the project plan in Smartsheet

Project Alpha

Brief   **Schedule**   **Worklist**   **Activity**

Project Alpha   Wed, Jul 17   -   Mon, Sep 09

⊞ Team Member   ⊞ Work Item

▾ **Initiation**   Wed, Jul 17   -   Thu, Jul 25

| | Diana Kennedy | Identify problem & opportunity | 10% | Wed, Jul 17 | - | Thu, Jul 25 | Scheduled |
| | Aviv Perez | Kick-off with stakeholders | 50% | Thu, Jul 25 | - | Thu, Jul 25 | Scheduled |

⊞ Team Member   ⊞ Work Item

▾ **Planning**   Fri, Jul 19   -   Mon, Sep 09

	Jamal King	Calculate Budget	5%	Fri, Jul 19	-	Mon, Jul 22	Scheduled
STG	Strategy	Communication Plan	60%	Sun, Aug 04	-	Tue, Aug 06	Scheduled
	Jamal King	Risk Management Plan	10%	Sun, Aug 04	-	Fri, Aug 09	Scheduled
	Diana Kennedy	Monitor progress	10%	Fri, Aug 23	-	Mon, Sep 09	Scheduled

⊞ Team Member   ⊞ Work Item

▾ **Launch**   Fri, Aug 23   -   Fri, Sep 13

| | Diana Kennedy | Manage risks | 50% | Fri, Aug 23 | - | Mon, Sep 09 | Scheduled |
| | Jamal King | Retrospective | 10% | Tue, Sep 10 | - | Fri, Sep 13 | Scheduled |

⊞ Team Member   ⊞ Work Item

Getting Started

How do I add the "Phase" column?

The phase column can be set up via the right panel in the sheet via the Resource Management icon. Or you can add any "Dropdown list" type column in your sheet, you can then configure that column in the Resource Management panel to use for phases.

How do I start using it?

To start using this feature:

1. Navigate to any of your project sheets where you want to include project phases
2. Once within a sheet, on the right panel, click on the Resource Management icon
3. Open the panel and choose a column for "phases" to add to the sheet and "Track Workload" to connect to Resource Management
   NOTE: Only a dropdown list type column can be used for phases

4. Your sheet will now include all the necessary columns for [workload tracking](#), as well as the phase column
5. Phase column is a dropdown list type column. Set your project phases as dropdown values to easily assign your task rows
6. Ensure each assignment/task in Smartsheet has phase values assigned in the phase column.
7. These phase values will be created in Resource Management, and the associated assignments will be synced automatically

You can now track time and generate reports for **different project phases** in Resource Management for any projects connected to Smartsheet.

What can I do with Phase Integration between Resource Management and Smartsheet?

1. Track phases in a sheet by setting it up in the Resource Management Panel
2. Phase column values will be synced to the connected Resource Management Project

In Resource Management:

3. Time Tracking: Track and report time for specific project phases to determine if they are ahead or behind schedule
4. Budget reports - Monitor which project phases are over or under budget
5. Portfolio management - Report on phases across all projects within a portfolio or zoom in on a specific phase, and take action based on the insight

What are the current limitations with Phase Integration between Resource Management and Smartsheet?

- Deletion of phases from the sheet is not supported **yet.**
- Actions to Create or Delete phases are only allowed from Smartsheet
- Phases can **only** be added to **new sheets** that are **not connected** to Resource Management. Retrospective addition of phases to existing connected sheets is not supported at this time
- Formulas are not supported in the phase column

Planned Enhancements

- Ability to update assignments under a phase in Resource Management will sync to the sheet and vice-versa *Available now 10/11*
- Ability to add phases retroactively to projects already connected to Resource Management
- Automatically delete phases that don't have assignments or Time entries associated
- Ability to map all required and optional columns in the panel while tracking workload/ connecting sheet to RM
- Ability to export project data from RM to a blank sheet

Additional Guidance:

Why does this feature have reduced functionality at EAP?
We are taking an iterative approach to provide the best and fastest experience. During the period of EAP, we will continue to add new functionality to enhance this feature. We will make sure to communicate new functionality when it's available.

How does the column handle phase values with different case sensitivity?
If you had used "TestPhase" previously for one or more rows, then you use "testphase" for another row, we will NOT create a new phase for "testphase" in RM; we will continue to use "TestPhase" and ignore the case changes here.

Can I add phases to an existing project sheet that is already connected to RM?
Currently, adding phases to an existing project sheet that is already connected to Resource Management is not supported. That is a planned enhancement and will be released during the EAP period. Communication will be shared.

Why do I not see an option to add phases while setting up the panel?
You may not be using the Smartsheet authentication (Sign in with Smartsheet) to access RM. This is a requirement to use the feature.

Is there a limit to the number of phases that I can add on a project?
No, there is currently no limit.

Does Control Center support this feature of Resource Management?
Yes, Phase integration between Resource Management and Smartsheet **is** supported for projects provisioned via Control Center. You can map the phase column within your project template to start provisioning *new* projects with the phase column mapped and ready to use.

Will other users who are shared to my project sheet be able to use this feature if they don't have it enabled?
Other users that are shared to your project sheet will not be able to set up the panel to add the phase column. However, if they do assign a phase value in an already setup column, that value will be synced to Resource Management for that project.