Event Registration And Tracking

Template Set Getting Started Guide

The Event Registration and Tracking template set helps you easily track and manage event registrations for any event.

smartsheet.com
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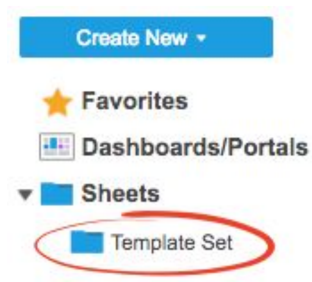
REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. Click here to see a list of discontinued plans.

Get the Template Set

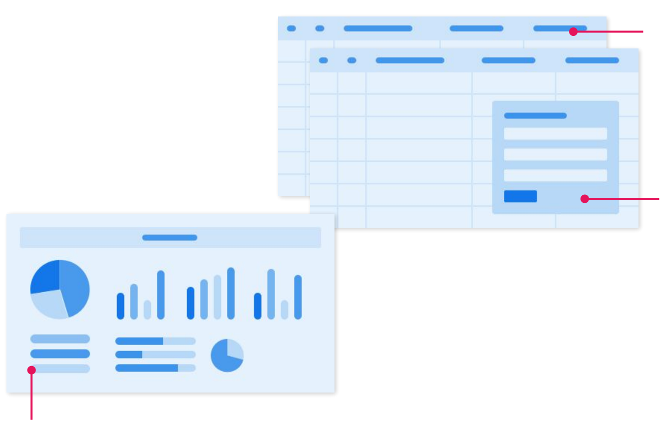
Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets**.**

Event Registration and Tracking Template Set



What's Included in the Set

With the Event Registration and Tracking template set, you can quickly start planning an event and collecting registration information.



Event Plan with Hard Deadlines Sheet
Auto-calculating workback schedule to plan your event timeline.

Event Registration and Summary Sheet
A single sheet to track attendee information and rollup metrics about your event.

Registration Form
A simple registration form that feeds requests directly in the Event Registration and Summary sheet.

Event Resources & Metrics Dashboard
A dashboard that summarizes key metrics about your event in real-time.

Event Registration and Tracking

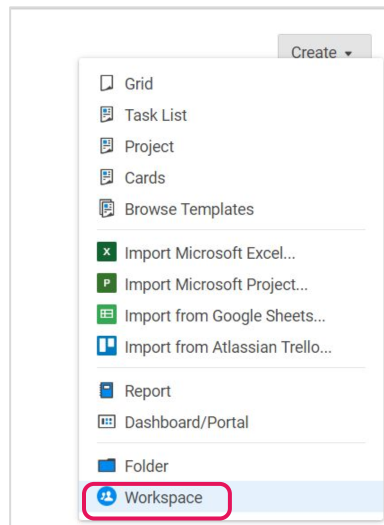
Template Set Getting Started Guide

Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1:

Create a New Workspace



Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

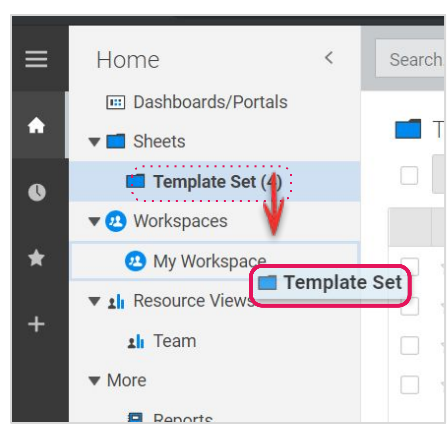
Learn more:

Workspaces Overview, Workspace Sharing, Home Tab

Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.



Learn more:

Manage Items in a Workspace (Add, Move, Remove)

Event Registration and Tracking

Template Set Getting Started Guide

Customize

Step 3:

Setup the Event Resources & Metrics Dashboard

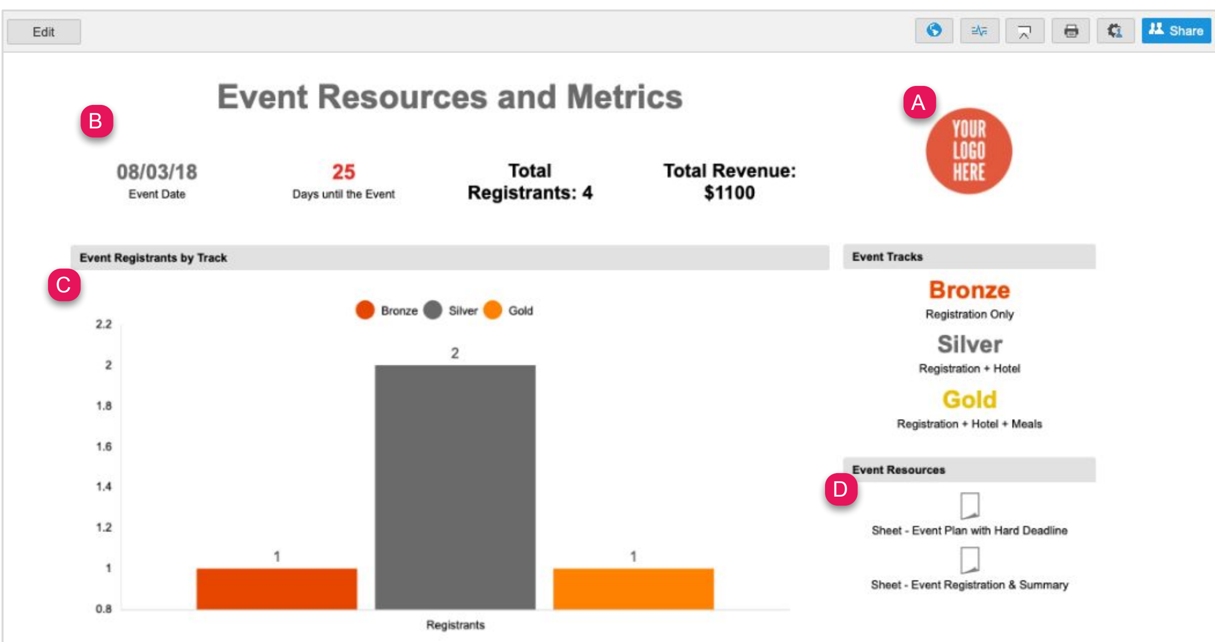
The Event Resources & Metrics dashboard summarizes the key information in real-time that you want to track for your event. Dashboards consist of different widgets that pull in live information from other sheets and reports.

A. Replace the logo placeholder with your own logo in the *Image* widget.

B. The Event Date, Days Until Event, Total Registrants and Total Revenue are *Metric* widgets that are pulling in live values from both your Event Plan and Event Registration sheets.

C. The Event Registrants by Track is a *Chart* widget that creates a column chart from your formulas at the top of your Event Registration sheet.

D. Event Resources is a *Shortcut* widget with links to your other sheets and reports. Feel free to add a shortcut to the URL for the sales opportunity form and other documents and resources.



Learn more:

[Make Changes to an Existing Dashboard], [Viewing and Sharing a Dashboard], [Widget Types for Smartsheet Dashboards], [Metric Widgets], [Chart Widgets]

Event Registration and Tracking

Template Set Getting Started Guide

Step 4:

Modify the Event Plan with Hard Deadline Sheet

The Event Plan with Hard Deadline sheet is a project sheet set up as a workback schedule, which outlines your project timeline from the end date backwards. The sheet will help organize your event planning from the start date column forward.

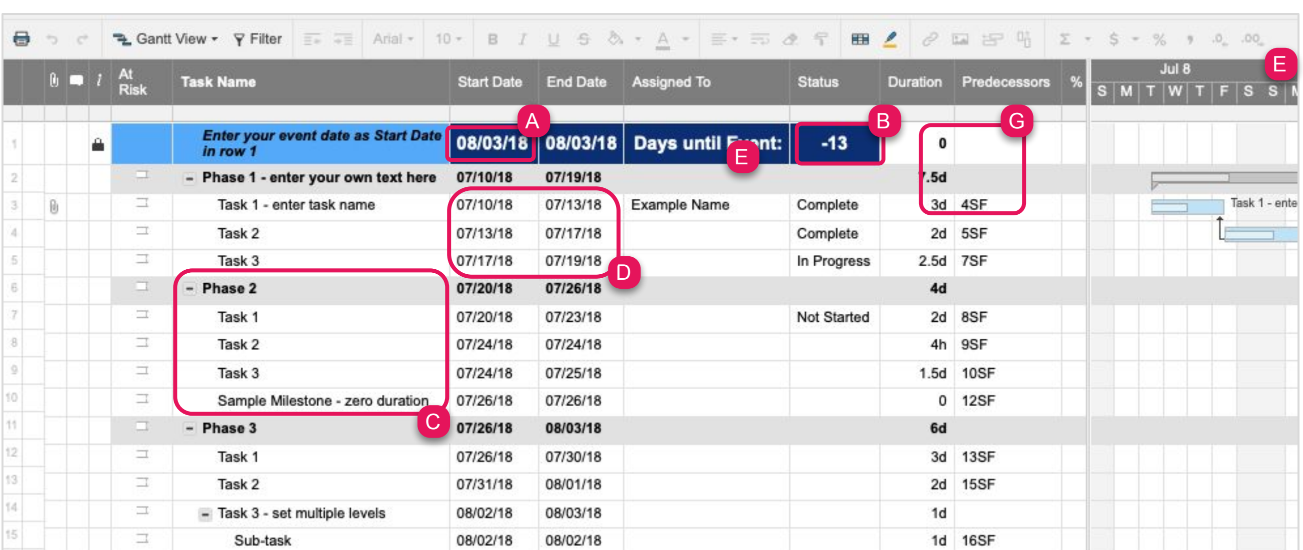
A. Enter your event date in row one of the *Start Date* column. The End Date column will auto populate with the exact same date because the duration is zero, which means that your event date is a milestone. All of the other dates in the sheet will auto populate based upon your entered event date.

B. The Days Until Event in row one is a formula that subtracts today's date from your event date and surfaces the result in the dashboard. This is the formula: **=$[End Date]$1 - TODAY()**

C. In the Task Name column, name the phases of your event in the parent (light gray) rows. Use the indented child (white) rows in your hierarchy, to enter tasks in the *Task Name* column. Indent subtasks under tasks by using the *Indent* button on the toolbar, or *Ctrl +]* on the keyboard.

D. Starting on row 3, enter dates in the Start Date and End Date columns for tasks in the child rows. The other data on your ancestor and parent rows, including Start Date, End Date, and % Complete are auto calculated by the tasks below the parent row.

E. Track the progress of your project by viewing the interactive Gantt timeline to see which tasks are complete (green), which are late (red), which are in progress (blue), and which are on hold (orange).



	Task Name	Start Date	End Date	Assigned To	Status	Duration	Predecessors
1	*Enter your event date as Start Date in row 1*	08/03/18	08/03/18	Days until Event:	-13	0	
2	Phase 1 - enter your own text here	07/10/18	07/19/18			7.5d	
3	Task 1 - enter task name	07/10/18	07/13/18	Example Name	Complete	3d	4SF
4	Task 2	07/13/18	07/17/18		Complete	2d	5SF
5	Task 3	07/17/18	07/19/18		In Progress	2.5d	7SF
6	Phase 2	07/20/18	07/26/18			4d	
7	Task 1	07/20/18	07/23/18		Not Started	2d	8SF
8	Task 2	07/24/18	07/24/18			4h	9SF
9	Task 3	07/24/18	07/25/18			1.5d	10SF
10	Sample Milestone - zero duration	07/26/18	07/26/18			0	12SF
11	Phase 3	07/26/18	08/03/18			6d	
12	Task 1	07/26/18	07/30/18			3d	13SF
13	Task 2	07/31/18	08/01/18			2d	15SF
14	Task 3 - set multiple levels	08/02/18	08/03/18			1d	
15	Sub-task	08/02/18	08/02/18			1d	16SF

Learn more:

[Project Management and Gantt Charts], [Creating a Work-Back Schedule], [Parent Rollup Functionality], [Hierarchy: Indent or Outdent Rows], [Keyboard Shortcuts], [Creating a Milestone to Mark a Significant Event in Your Project]

Event Registration and Tracking

Template Set Getting Started Guide

Step 5:

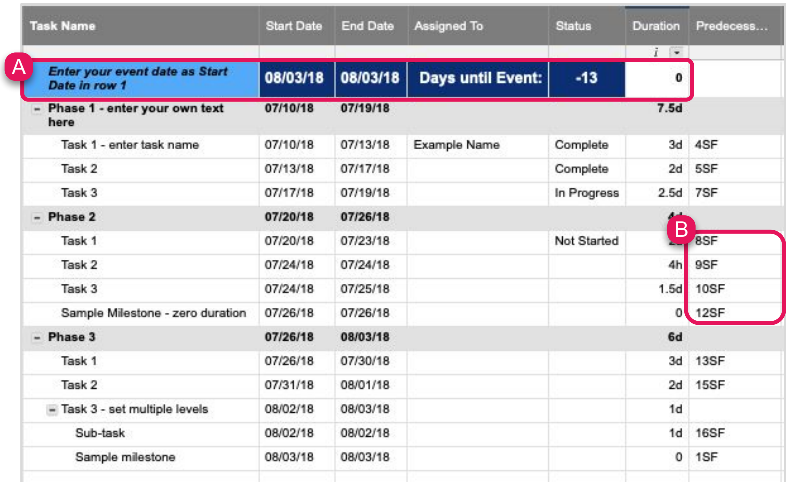
Adjust Durations & Predecessors

“Duration” and “Predecessor” are two unique column types that exist in project sheets. Since the sheet is set up with dependencies and predecessors it will provide an estimated end date for tasks based on duration.

A. Enter a start date, then set the duration of a task in the “Duration” column.

B. Set predecessors, or relationships between tasks, in the “Predecessors” column.

C. The workback schedule uses SF, Start-to-Finish, to calculate finish date of the current row based on the specified predecessor’s start date.



Learn more:

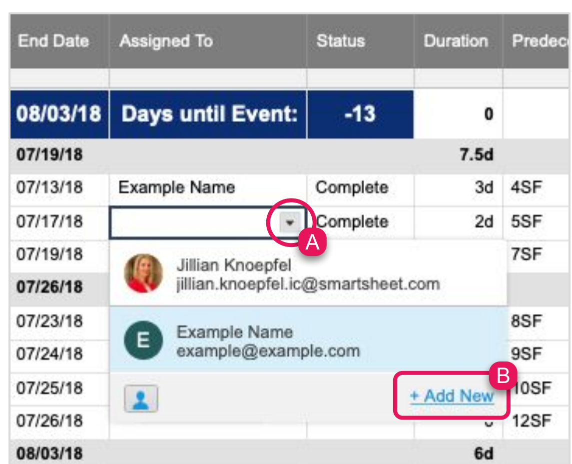
[Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors], [Creating a Work-Back Schedule]

Step 6:

Assign Tasks to Team Members

Using a Contact List column is the best practice when assigning tasks on your sheet. A contact includes both name and email address - which drives automated actions, notifications, reports and more.

A. Add contacts in the “Assigned To” column by typing in an existing contact from your Contact List, or individually create a new contact.



Learn more:

[Contact List Column], [Manage Contacts in the My Smartsheet Contacts List]

Event Registration and Tracking

Template Set Getting Started Guide

Step 7:

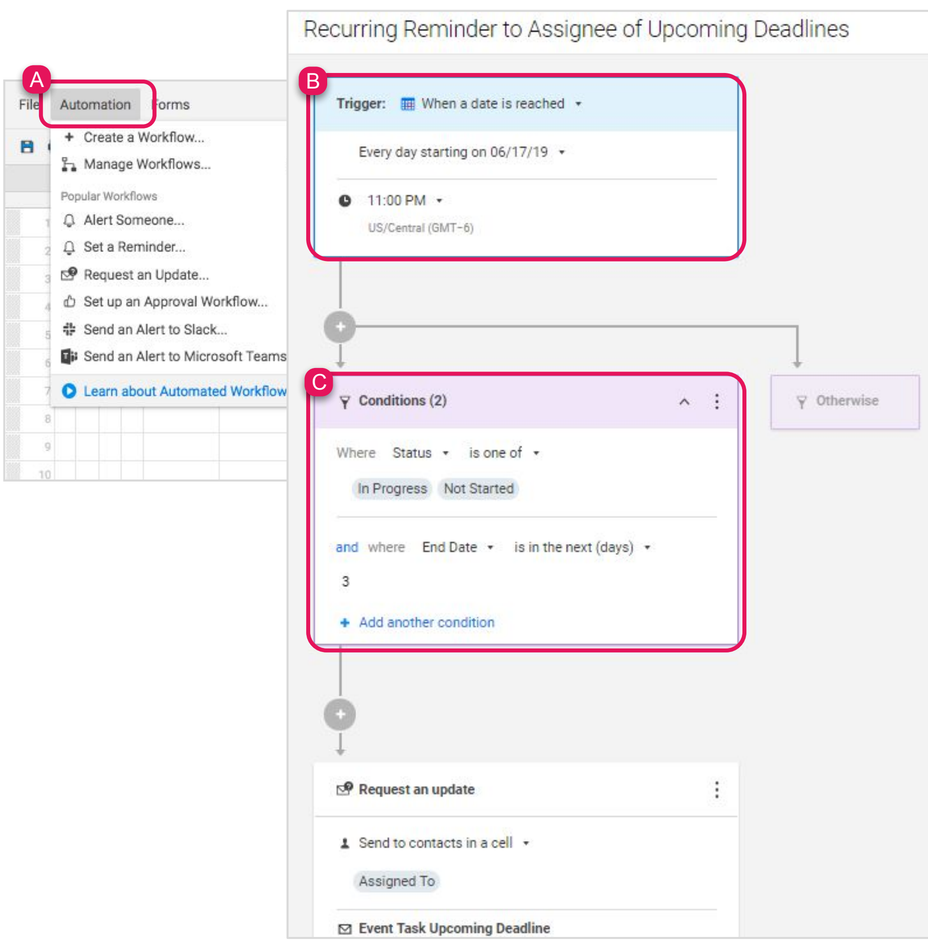
Recurring Reminder

An automated recurring reminder is a great way to save time and keep track of deadlines. The "Recurring Reminder to Assignee of Upcoming Deadlines" alert will notify the contact listed in the Assigned To column every day when the End Date is in the next 3 days and where the Status is either Not Started or In Progress. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

A. Modify the reminder by going to *Automation* and selecting *Manage Workflows* in the dropdown menu. Then double-click on the workflow to open the editor window.

B. To customize the workflow's schedule (trigger box), click on the dropdown that begins with *Every day starting on* and select Run once to trigger on a single date, or choose Custom to edit the recurrence schedule.

C. Customize the workflow conditions (condition boxes) to add criteria and then click *Save.*



Learn more:

[Alerts & Reminders]

Event Registration and Tracking

Template Set Getting Started Guide

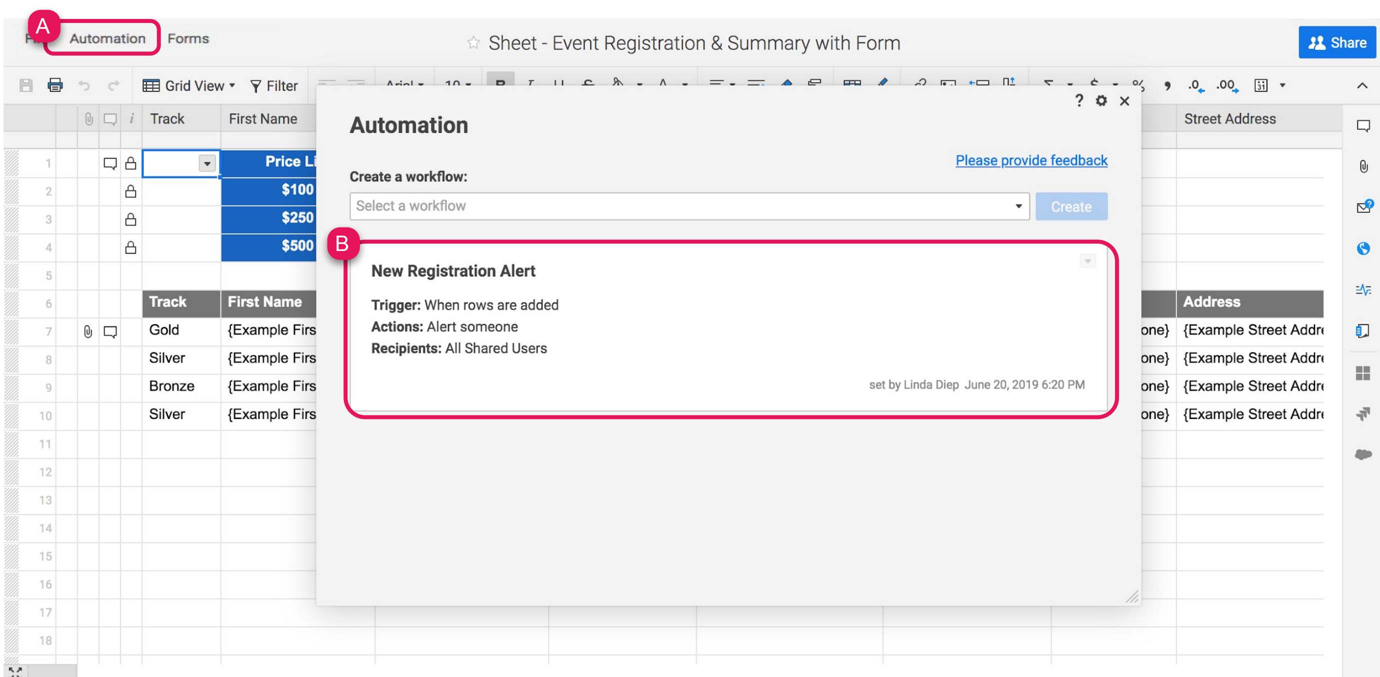
Step 8:

Manage the Event Registration & Summary Sheet

New registration form fills will populate the Event Registration & Summary sheet. Add or edit columns in this sheet to fit your event attendee information needs. Then add them to the form as a new field.

A. An automated alert workflow has already been set on this sheet to notify anyone shared to the sheet when a new registration has been added. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.

B. Double-click on the alert workflow in order to open the rule editor window.



Learn more:

[Insert, Delete, or Rename Columns], [Save Time and Work Faster With Automated Workflows] smartsheet

Event Registration and Tracking

Template Set Getting Started Guide

Step 9:

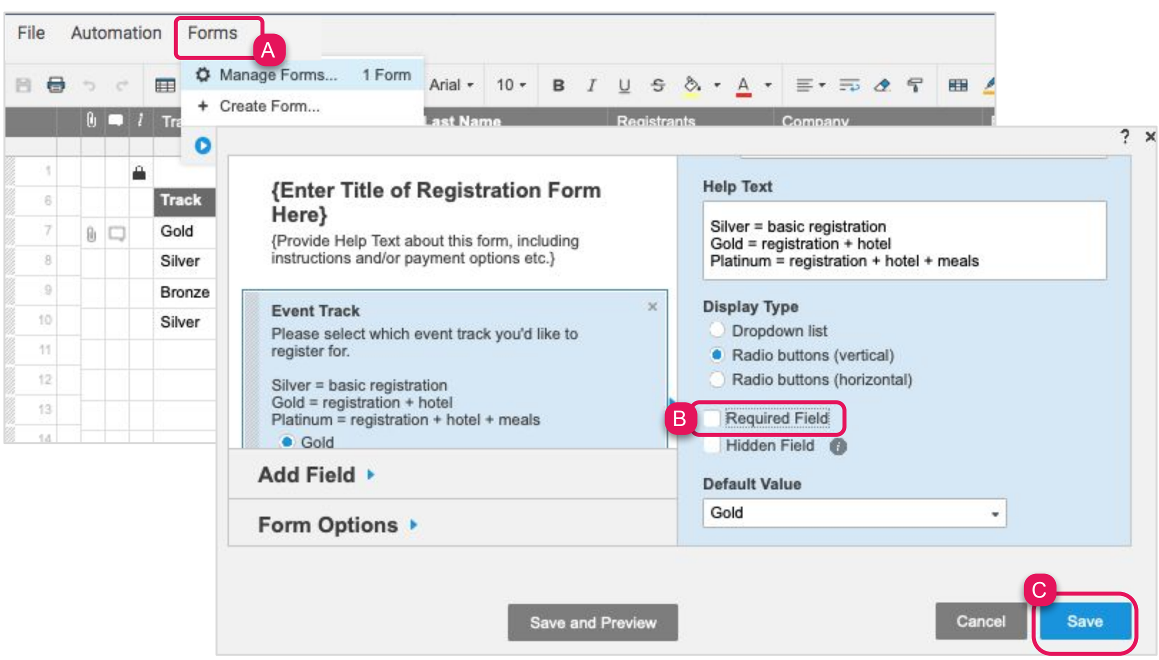
Edit Event Registration Form

The Event Registration form is how attendees can register for your event. The information completed in the form will appear in the Event Registration and Summary sheet, which tracks registrants and calculates the totals by number and type. Open the Event Registration and Summary sheet and click on Forms in the top menu to customize the registration form.

A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify Form Options.

B. Mark fields as required that you want to ensure sales reps complete.

C. Click *Save* to close the form builder and copy and save the URL displayed. Give this URL to anyone who will be registering for your event. You can also share it via email, hyperlink, or embed it on a website.



Learn more:

[Forms](), [Edit Existing Fields]()

Event Registration and Tracking

Template Set Getting Started Guide

Step 10:

Sheet Bonus: View or Edit Your Project Summary Data

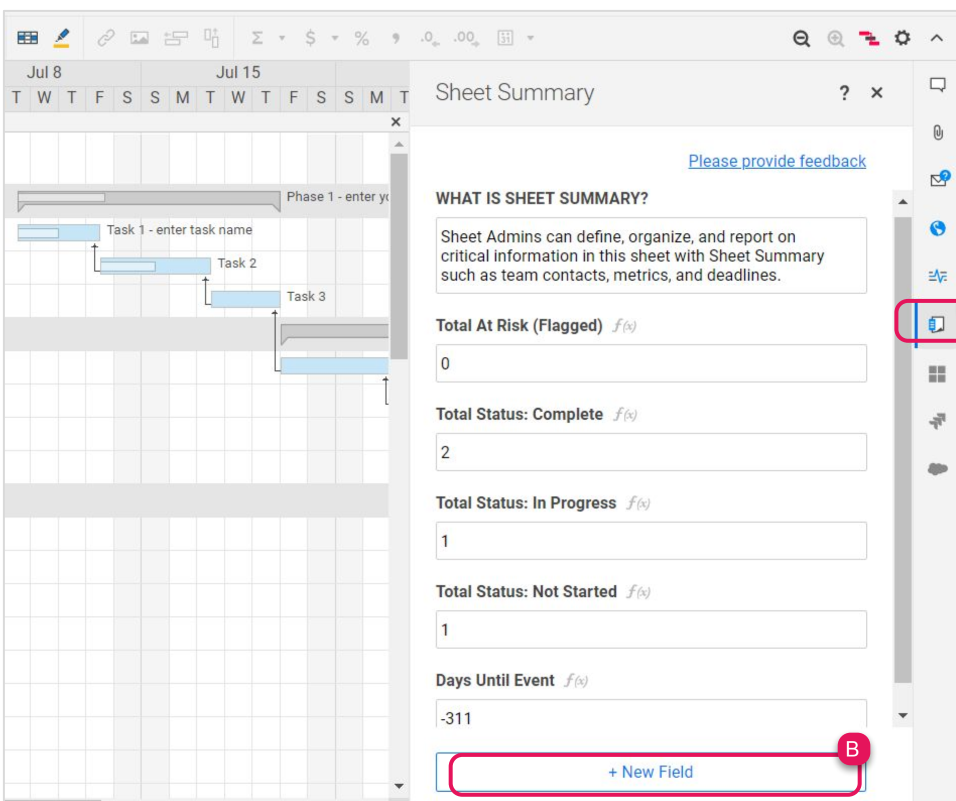
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. Both the Event Plan with Hard Deadline sheet and Event Registration & Summary with Form sheet include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. On the Event Plan with Hard Deadline sheet, you can see a breakdown of task status and countdown until the event. On the Event Registration & Summary with Form sheet, you get a quick recap of registrations by track and associated revenue. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⁝) to open the field options dropdown menu.



Learn more:

[Define Your Work with Sheet Summary](), [Maximize Your Sheet Summary Usage](), [Create a Portfolio View with a Summary Report]()

Event Registration and Tracking

Template Set Getting Started Guide

Step 11:

View Summary Info with Pre-Built Formulas

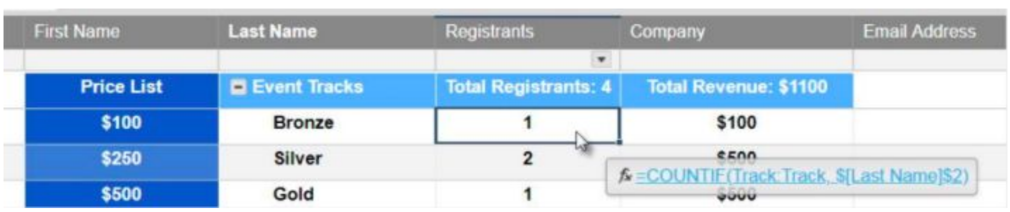
The table at the top of the Event Registration sheet consists of summary and hierarchy formulas. Use this data to populate a live chart in your Event Resources & Metrics dashboard. Here are examples of the formulas included in the sheet:

A. Total Registration by Track: **=COUNTIF(Track:Track, $[Last Name]$2)**

B. Total of all Registrants: **="Total Registrants:" + " " + SUM(CHILDREN())**

C. Total Revenue by Track: **=[First Name]2 * Registrants2**

D. Total of all Revenue: **="Total Revenue: $" + SUM(CHILDREN())**



Learn more:

[Formulas and Functions, Hierarchy: Indent or Outdent Rows]

Step 12:

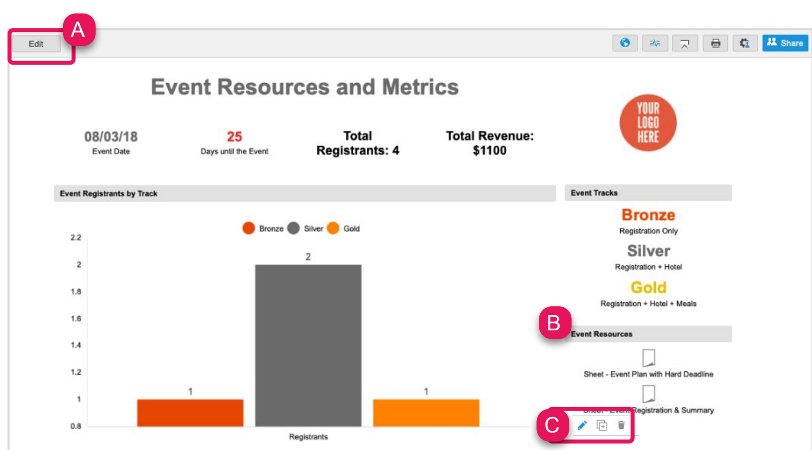
Customize the Dashboard

Provide a central location for your team to get updates on your event. Easily customize the dashboard to include your event resources by editing Event Resources in the Shortcut widget.

A. Click *Edit*, to start editing the dashboard.

B. Hover over the Event Resources widget and a widget options menu will appear at the bottom right corner.

C. Click *Edit* (pencil icon) to add and remove shortcuts.



Learn more:

[Make Changes to an Existing Dashboard], [Viewing and Sharing a Dashboard], [Widget Types for Smartsheet Dashboards], [Metric Widgets]

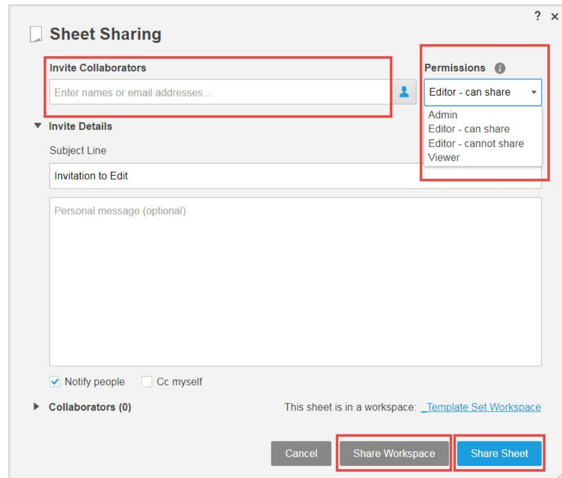
Event Registration and Tracking

Template Set Getting Started Guide

Step 13:

Share Your Event Registration and Tracking Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the Event Registration and Tracking Template Set! Share your feedback here.