



Ongoing Preventative Maintenance

Template Set Getting Started Guide

With the Preventative Maintenance template set, you can capture maintenance items from interior and exterior project sites, sequence and prioritize items in a tracking sheet, manage action items and visualize all items on a Smartsheet dashboard.

Ongoing Preventative Maintenance

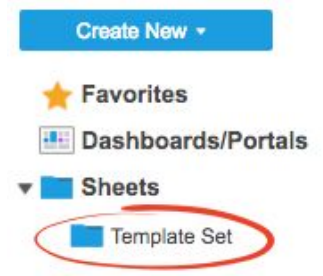
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited 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.

[Ongoing Preventative Maintenance Template Set](#)



What's Included in the Set

With the Ongoing Preventative Maintenance Template Set, you can capture maintenance items from interior and exterior project sites, sequence and prioritize items in a tracking sheet, manage action items and visualize all items on a Smartsheet dashboard.

Completed Maintenance Report

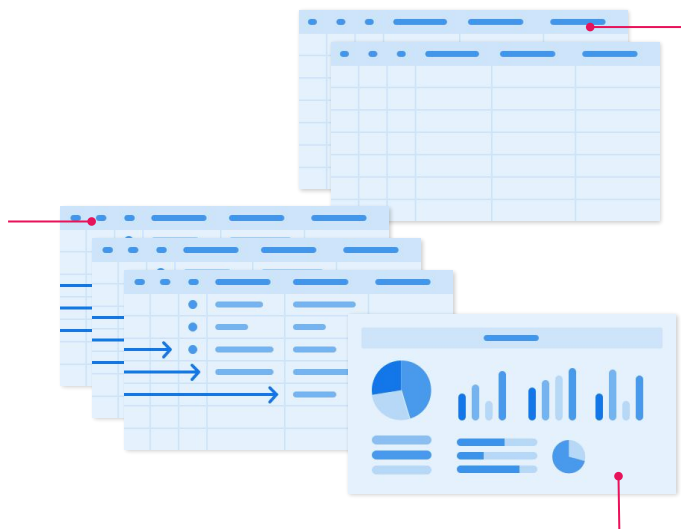
A running log of completed maintenance items

Past Due Maintenance Report

A running log of past due maintenance items

Upcoming Maintenance Report

A running log of upcoming maintenance items



Ongoing Preventative Maintenance Sheet

Sent out to team members in the field, listing all new items and potential maintenance

Maintenance Metrics Sheet

Tracks and maintains all of your maintenance items and expenses

Preventative Maintenance Portal

A resource hub for your team that includes all of the critical elements of your maintenance process

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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.

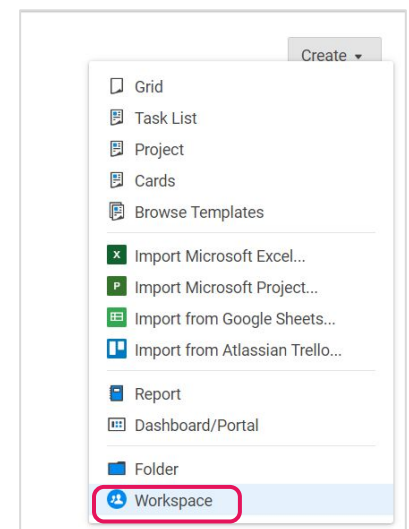
Step 1:

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](#)



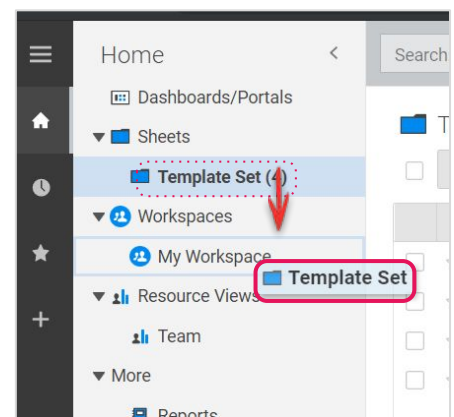
Step 2:

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 \(Add, Move, Remove\)](#)



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Customize

Step 3:

Modify the Preventative Maintenance Dashboard

Track and maintain all preventive maintenance items and expenses in the Maintenance dashboard. You can share the status of the maintenance tasks with others and provide one central location for resources. Dashboard consists of different widgets that pull in live information from other sheets and reports.

- A. Edit the *Image* widget with your company logo.
- B. Update the *Rich Text* widget in Key Contacts and General Information with information about your team and project updates.
- C. Use the *Shortcut* widget in Quick Links to attach links to websites, files, or Smartsheet items.
- D. Edit the New Preventative Maintenance form, embedded using the *Web Content* widget, to replace the placeholder web content with your own Smartsheet form URL found in the Ongoing Preventative Maintenance sheet.

The screenshot displays a Smartsheet dashboard titled "Maintenance Dashboard". It features several widgets:

- Key Contacts:** Lists Brent Williams (brent@mbfcorp.com) and Alexandra Mattson (alex@mbfcorp.com).
- Quick Links:** A list of report links including "Sheet - Ongoing Preventative M...", "Sheet - Maintenance Metrics", "Report - Completed Maintenance", "Report - Past Due Maintenance", and "Report - Upcoming Maintenance".
- General Information:** A text area for announcements or news.
- Project Status:** A summary table showing 3 Completed, 3 Upcoming, 4 Past Due, and 2 Future Task items.
- Maintenance Metrics:** A bar chart showing expenses for Completed (\$275.00), Upcoming (\$200.00), Past Due (\$875.00), and Future (\$400.00).
- Expenses:** A pie chart showing 73% Interior spend and 27% Exterior spend.
- Reports:** Two tables showing maintenance tasks with columns for Condition, Maintenance Task, Description, Assigned To, Scheduled Date, Date Completed, Maintenance Performed, Maintenance Expense, Expense Description, and Status.

Condition	Maintenance Task	Description	Assigned To	Scheduled Date	Date Completed	Maintenance Performed	Maintenance Expense	Expense Description
	Stairways and Ladders		Kirk Caskey	10/24/18			\$300.00	
	Requirements for Storage		Lori Grimes	10/27/18			\$100.00	
	Electrical		Lori Grimes	10/25/18			\$125.00	
	Trenching and Excavation		Henry McNeal	11/01/18			\$350.00	

Condition	Maintenance Task	Description	Assigned To	Scheduled Date	Date Completed	Maintenance Performed	Maintenance Expense	Expense Description	Status
	Common Lighting	Check common	Alexandra Mattson	11/28/18			\$200.00		

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

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Step 3 (continued):

Modify the Preventative Maintenance Dashboard

Track and maintain all preventive maintenance items and expenses in the Maintenance dashboard. You can share the status of the maintenance tasks with others and provide one central location for resources. The dashboard consists of different widgets that pull in live information from other sheets and reports.

- E. The *Metric* widgets in Project Stats displays roll-up data that pulls from the Maintenance Metrics sheet.
- F. Using the *Chart* widgets in Maintenance Metrics and Expenses, you can compare live data and demonstrate how your team's expenses are trending over time.
- G. The Reports section include *Report* widgets that displays the live Past Due, Upcoming, and Completed Maintenance reports in the dashboard.

The screenshot shows a Smartsheet dashboard titled "Maintenance Dashboard". It features several widgets:

- Key Contacts:** Lists Brent Williams (brent@mbcorp.com) and Alexandra Mattson (alex@mbcorp.com).
- Quick Links:** Includes links for Ongoing Preventative M..., Maintenance Metrics, Completed Maintenance, Past Due Maintenance, and Upcoming Maintenance.
- General Information:** A section for announcements or news.
- Submit New Maintenance Requests Here:** A form for new requests with fields for Maintenance Issue, Type (Interior/Exterior), Description, and File Attachments.
- Project Status:** A summary of task counts: Completed (3), Upcoming (3), Past Due (4), and Future Task (2).
- Maintenance Metrics:** A bar chart showing expenses for Completed Spend (\$275.00), Upcoming Spend (\$200.00), Past Due Spend (\$875.00), and Future Spend (\$400.00).
- Expenses:** A pie chart titled "Spend: Interior vs. Exterior" showing 73% for Interior and 27% for Exterior.
- Reports:** Two tables showing maintenance tasks.

Condition	Maintenance Task	Description	Assigned To	Scheduled Date	Date Completed	Maintenance Performed	Maintenance Expense	Expense Description
	Stairways and Ladders		Kirk Caskey	10/24/18			\$300.00	
	Requirements for Storage		Lori Grimes	10/27/18			\$100.00	
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Condition	Maintenance Task	Description	Assigned To	Scheduled Date	Date Completed	Maintenance Performed	Maintenance Expense	Expense Description	Status
	Common Lighting	Check common	Alexandra Mattson	11/28/18			\$200.00		

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

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Step 4:

Format the Ongoing Preventative Maintenance Sheet

Track and manage your maintenance items and expenses in the Ongoing Preventative Maintenance sheet. You can keep record of task status, scheduled and completed dates, maintenance performed, and expenses all in one sheet. We built a formula in the Status column to calculate if the task is complete (green RYGB ball), scheduled within the next 10 days (yellow RYGB ball), scheduled for the next 10 days or more (blue RYGB ball), or past due (red RYGB ball). This column is locked to prevent editors from modifying the formula and data.

We have also set up a conditional formatting rule so you can visually identify completed (light gray strikethrough row), past due (red font), and upcoming maintenance items (within 10 days = yellow taskbar or 10+ days = blue taskbar). You can assign maintenance items in the Assigned To column, which is a *Contact List* column type. It's a best practice to use *Contact List* columns when assigning owners because they can be leveraged to set automated actions, alerts, reports, and more.

- Add or delete any columns to accommodate your team's unique process: right-click on any column and select *Edit column properties* or *Delete*.
- Customize, disable, or add the conditional formatting rules by clicking on the conditional formatting button in the top toolbar.
- An automated alert workflow has already been set on this sheet to notify anyone shared to the sheet when a new task has been assigned to them. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu. Then double-click on the New Assigned Maintenance Task workflow in order to open the editor window.

	Status	Action	Type	Description	Assigned To	Scheduled Date	Date Completed	Maintenance Performed	Maintenance Expense	Expense Description
1		Weekly Maintenance: 12 focus areas							\$0.00	
2	●	Medical Services and First Aid	Interior	Where life-threatening injuries could occur, is a facility for the treatment of injured employees located within three minutes of the jobsite?	Kirk Caskey	10/21/18	10/26/18	Purchased First Aid Kit	\$126.00	Med-Kit-(Large-F
3	●	Stairways and Ladders	Exterior		Kirk Caskey	10/24/18			\$300.00	
4	●	Requirements for Storage	Exterior		Lori Grimes	10/27/18			\$100.00	
5	●	Ventilation	Interior	Does the employer ensure that concentrations of hazardous substances such as dusts, fumes, mists, vapors, or gases produced in the course of work	Kirk Caskey	10/29/18	11/04/18		\$60.00	
6	●	Electrical	Exterior		Lori Grimes	10/25/18			\$125.00	
7	●	Inspect Hall Walls & Trim	Interior	Check for holes and major soffits	Alexandra Matteo	11/06/18	11/10/18		\$100.00	
8	●	Trenching and Excavation	Exterior		Henry McNeal	11/01/18			\$350.00	
9	●	Common Lighting	Interior	Check common area lighting and replace bulbs as necessary	Alexandra Mattso	11/28/18			\$200.00	
10	●	[Add New Action Here]	Interior		June Taylor	11/24/18				
11	●	Fall protection	Exterior		Alexandra Mattso	12/02/18			\$150.00	
12	●	Scaffolding	Exterior		Lori Grimes	12/05/18			\$250.00	
13	●	Motor Vehicle Safety/Highway Work Zones	Exterior		Kirk Caskey	11/30/18			\$0.00	

Learn more:

[Apply Formatting Automatically with Conditional Formatting Rules](#), [Save Time and Work Faster With Automated Workflows](#), [Contact List](#), [Managing Contacts](#)

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Step 5:

Edit New Preventative Maintenance Form

The New Preventative Maintenance Form is how your field team can quickly submit new maintenance requests when on site. The information completed in the form will appear in the Ongoing Preventative Maintenance sheet, which tracks maintenance types, assigned owners, expenses, and dates. Open the Ongoing Preventative Maintenance sheet and click on Forms in the top menu to customize the form.

- 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.
- Mark fields as required that you want to ensure your field team completes.
- Click *Save* to close the form builder and copy and save the URL displayed. Give this URL to anyone who will be on the field submitting new maintenance requests. You can also share it via email, hyperlink, or embed it on a website.

The screenshot displays the 'New Preventative Maintenance Form' builder interface. The interface is divided into two main sections: 'Form Title and Description' and 'Form Fields'. The 'Form Fields' section includes a 'Maintenance Issue' field (marked with a red 'B'), a 'Type' section with radio buttons for 'Interior' and 'Exterior', a 'Description' field, and a 'File Attachments' section with an 'Upload' button. The 'Form Title and Description' section includes a 'Title' field (containing 'New Preventative Maintenance Form') and a 'Description' field. A 'Hide title and description in form' checkbox is also present. At the bottom, there are 'Preview', 'Cancel', and 'Save' buttons. The 'Save' button is marked with a red 'C'. The background shows a grid view of a spreadsheet with various data points, including a 'Status' column and a 'Forms' menu item (marked with a red 'A').

Learn more:

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

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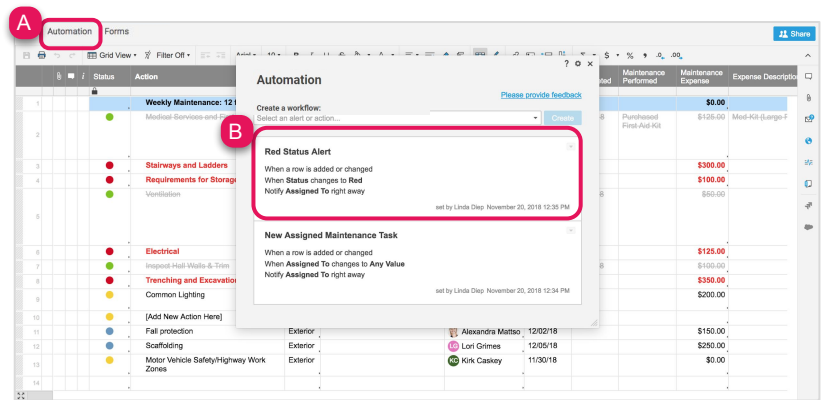
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Step 6:

Edit Red Status Alert

As task owners work and complete their assigned maintenance items, they will enter the date completed in the Date Completed column. On tasks that are not completed and have a blank field in the Date Completed column, the RYGB symbols will automatically update to a red status ball and trigger an automated alert to the assigned owner for immediate action.

- A. To modify the automated alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.
- B. Then double-click on the Red Status Alert workflow in order to open the editor window.



Learn more:

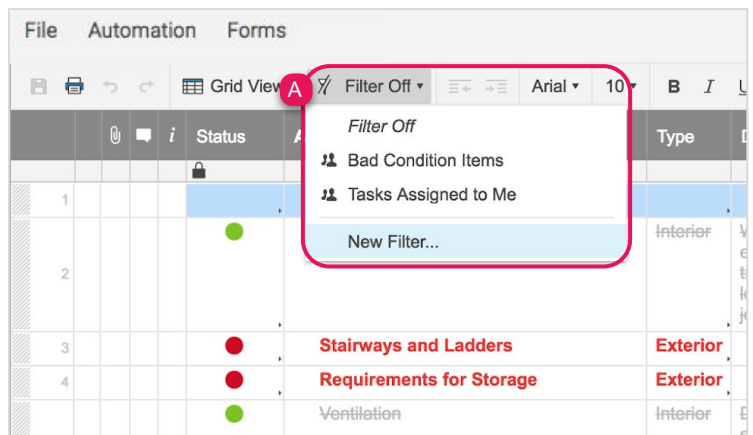
[Save Time and Work Faster With Automated Workflows](#)

Step 7:

Use Sheet Filters

Anyone viewing the sheet can create filters to see tasks that meet certain criterias. On the Ongoing Preventative Maintenance sheet, we created a shared filter called Tasks Assigned to Me which only displays rows that have been assigned to the current user viewing the sheet. Anyone viewing the sheet can select that filter to only see their assigned items.

- A. Select the *Filter Off* button in the toolbar to create, use or modify filters.



Learn more:

[Filters](#), [Shared Filter](#)

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Step 8:

Recurring Reminder

An automated recurring reminder is a great way to save time and keep track of deadlines. The Recurring Scheduled Maintenance reminder will notify the contact listed in the Assigned To column every day when the Scheduled Date is in the next 3 days and where the Date Completed is still blank. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

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

The image shows two screenshots of the Smartsheet Automation editor. The left screenshot shows the 'Automation' menu with 'Manage Workflows...' selected, and a list of workflows including 'Recurring Scheduled Maintenance Reminder'. The right screenshot shows the editor for this workflow. It features a 'Trigger' box with a dropdown menu open, showing options like 'Every day starting on 06/18/19', 'Run once', and 'Custom...'. Below the trigger is a 'Conditions (2)' box with two conditions: 'Where Date Completed is blank' and 'and where Scheduled Date is in the next (days) 3'. At the bottom, there are action boxes for 'Alert someone' and 'Send to contacts in a cell'.

A Automation Forms

A Automation

Create a workflow:
Select a workflow

A Recurring Scheduled Maintenance Reminder

Trigger: Every day starting on 06/18/19 at 10:00 AM
Actions: Alert someone

New Assigned Maintenance Task

Trigger: Every day starting on 05/27/19 ending after 3 times at
Actions: Alert someone

Red Status Alert

Trigger: When rows are added or changed AND when 'Status' c
Actions: Alert someone

Recurring Scheduled Maintenance Reminder

B Trigger: When a date is reached

Every day starting on 06/18/19

Run once

Custom...

Every day starting on 06/18/19

C Conditions (2)

Where Date Completed is blank

and where Scheduled Date is in the next (days) 3

+ Add another condition

Alert someone

Send to contacts in a cell

Learn more:

[Alerts & Reminders](#)

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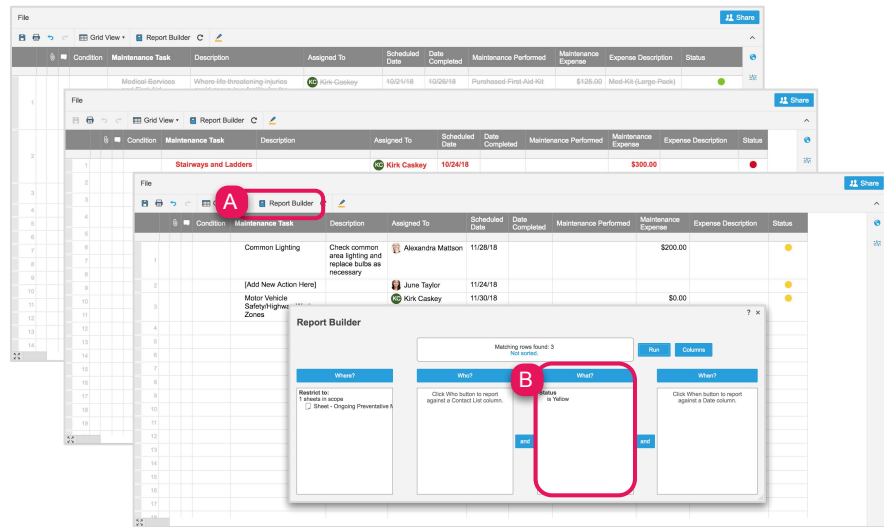
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Step 9:

Use the Completed, Past Due, Upcoming Maintenance Reports

The Completed Maintenance, Past Due Maintenance, and Upcoming Maintenance reports are used to surface a table to the Maintenance dashboard via the *Report* widget. The Report Builder filters all rows that have a status of either red, yellow, or green RYGB balls.

- A. To modify options in a Report, click on the Report Builder and edit the criteria.
- B. Select the *What* button in the toolbar to edit what condition you would like displayed. Learn more about the criteria in our Reports article.



Learn more:

[Reports](#)

Step 10:

Use the Maintenance Metrics Sheet

The Maintenance Metrics sheet is a central repository where metrics you want to track across all action items are rolled up. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real time, the information in the underlying sheets.

- A. Review the categories under each section to match your status in the Ongoing Preventative Maintenance sheet. Replace the names of the assignees under the Resources section. The formulas will automatically begin to count the added resources entered in this section.
- B. If you added new types in the Expense Totals column in the Ongoing Preventative Maintenance sheet, insert a new row to the Expense Totals hierarchy and copy the formula.

Label	Metric 1	Metric 2	Metric 3
Ongoing Preventative Maintenance	12		
- Status		12	
Green		3	
Blue		2	
Yellow		3	
Red		4	
- Expense By Status		Completed Spend	Upcoming Spend
Expense		\$275.00	\$200.00
Past Due Spend			\$875.00
Expense Totals		\$1,750.00	
Interior		\$475.00	
Exterior		\$1,275.00	
- Resources	12		
Kirk Caskey		4	
Lori Grimes		3	
Henry McNeal		1	
June Taylor		1	
Alexandra Mattson		3	

Learn more:

[Cross-sheet Formulas](#)

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Step 11:

Share Your Ongoing Preventative Maintenance Template Set

Sharing is the best way to collaborate with others involved in your maintenance process. Share your entire workspace with members of your department or simply share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).

The screenshot shows the 'Sheet Sharing' dialog box. It has a title bar with a question mark and a close button. The main content is divided into sections: 'Invite Collaborators' (a text input field), 'Invite Details' (fields for 'Subject Line', 'Invitation to Edit', and 'Personal message (optional)'), and 'Permissions' (a dropdown menu). At the bottom, there are checkboxes for 'Notify people' and 'Cc myself', a 'Collaborators (0)' section, and a workspace path. Three buttons are at the bottom: 'Cancel', 'Share Workspace', and 'Share Sheet'.

Learn more:

[Workspace Sharing](#)