smartsheet

Project Schedule Management

Template Set Getting Started Guide

With the Project Schedule Management Template Set, you can quickly evaluate the health of any project. Update project schedules, status, task ownership, and track overall project conditions in real time with the included easy-to-use dashboard and reports.

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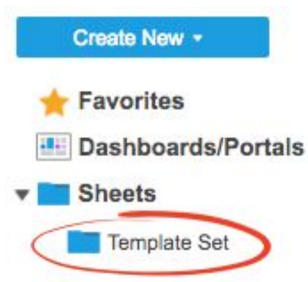
REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not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

Download

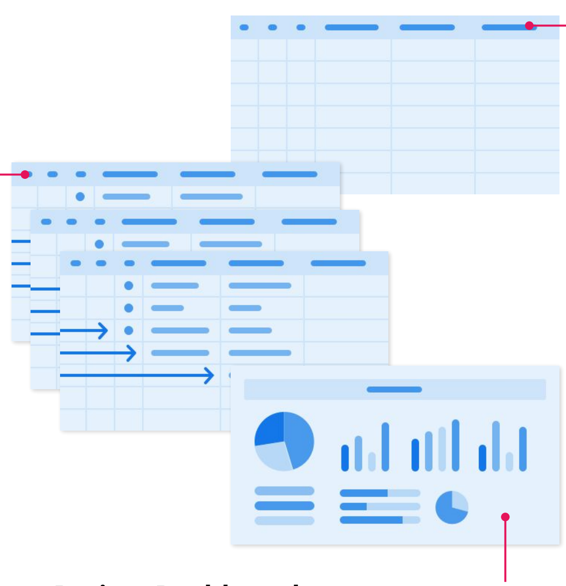


The data will be download in the *Sheets* folder. Look on the left-hand side, under *Sheets*, to access and launch the template set items.

[Project Schedule Management Template Set]

How It Works

With the Project Schedule Management Template Set, you can quickly evaluate the health of any project. Update project schedules, status, task ownership, and track overall project conditions in real time with the included easy-to-use dashboard and reports. This template set includes:



Project Plan Template Sheet
A single sheet to capture project details and assign tasks.

Project Risk Report
A report that displays the tasks that are at risks.

Project Milestones Report
A report that displays all of the project phases and key milestones.

My Tasks Report
A report that displays the tasks that are assigned to the user currently signed in.

Project Dashboard
The one-stop-shop for stakeholders to view everything that's happening with the project. It includes high-level charts representing project health, milestones, budget, and reports.

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Set Up

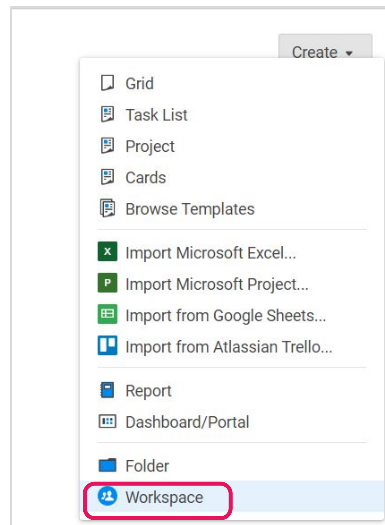
Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

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

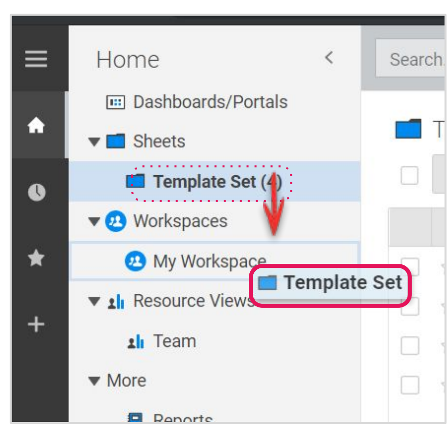


Step 2:
Drag the Files into Workspace

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:

Project Dashboard

The Project Dashboard is the keystone of your template set. It pulls together all of the critical information you need to track the overall health of your project. Dashboards are made of different widgets that pull real-time information in from your other sheets and reports. This dashboard was pre-designed to seamlessly pull information from your Project Plan Template and connected reports. **It is all set up and ready to work for you. No modifications necessary!**

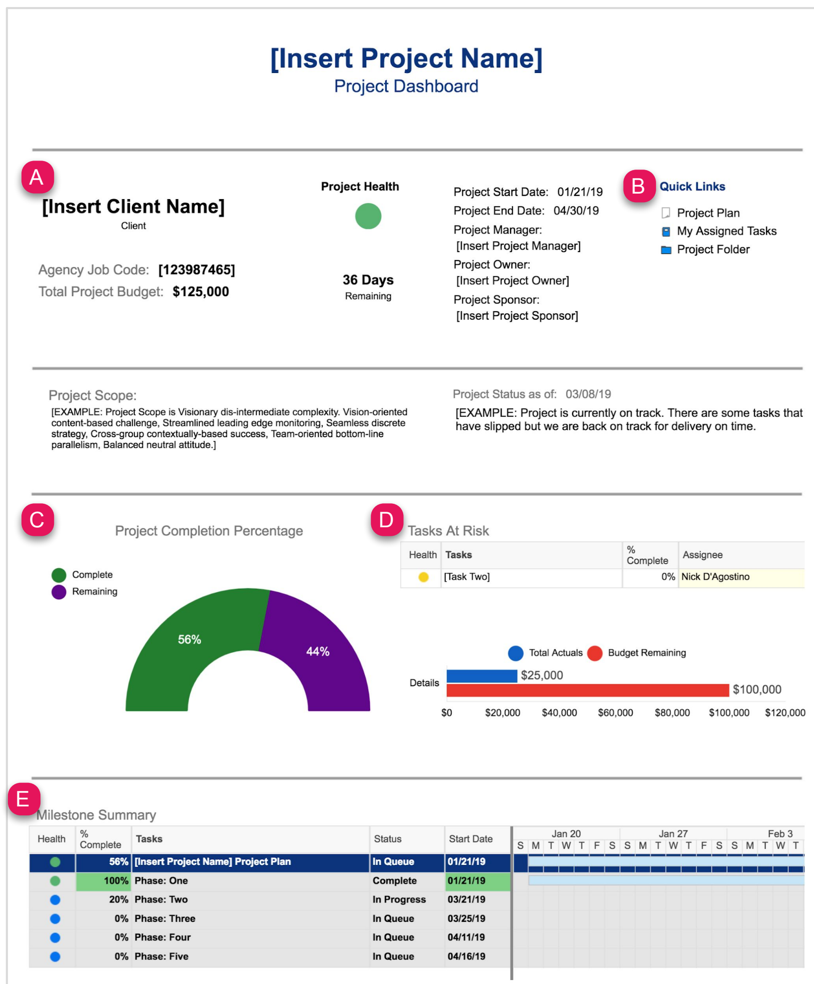
A. The first three sections of your dashboard include *Metric* widgets, pulling live data from your Project Plan Template sheet.

B. Quick LInks, a *Shortcut* widget, provides easy access to your Project Template Plan sheet, your My Task report, and the associated Project Folder where you can find all the pieces to this template set.

C. In the fourth section, Project Completion Percentage and Budget Summary are *Chart* widgets that are also pulling live data from your Project Plan Template sheet.

D. "Tasks at Risk," is a *Report* widget displaying your live data from your My Tasks report.

E. In the 5th and final section, "Milestone Summary," is also a *Report* widget displaying information from your Project Milestones report.



Learn more:

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

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Step 4:

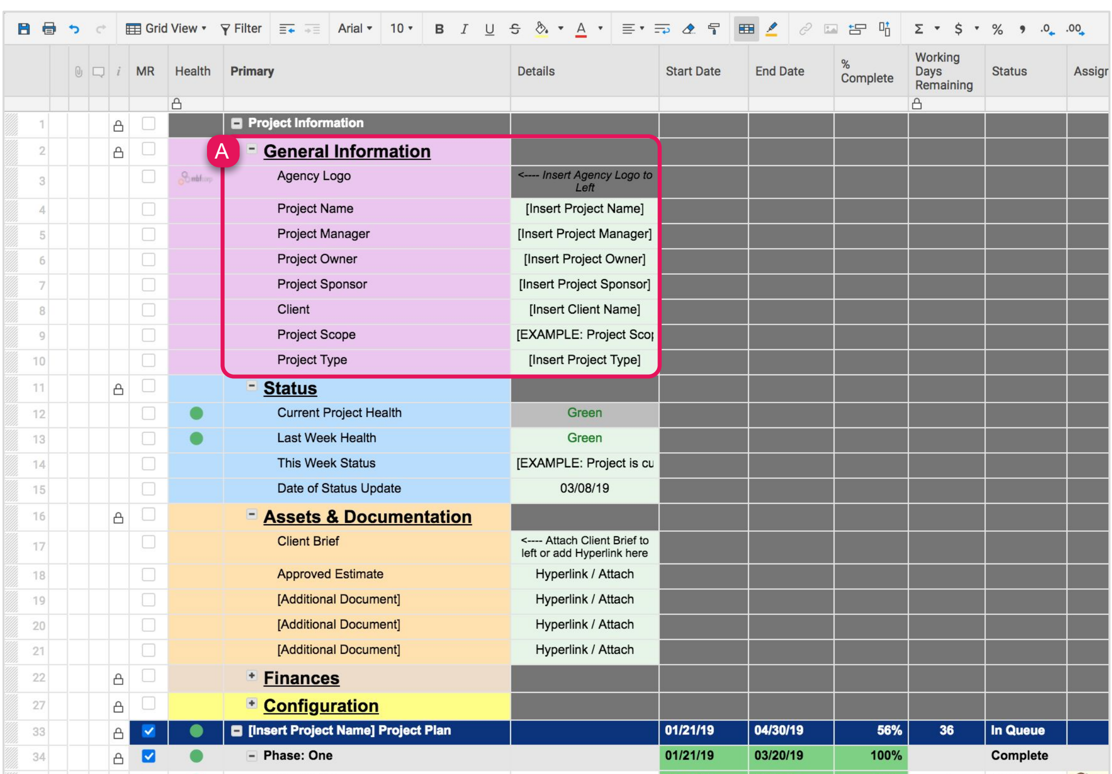
Project Plan Template Sheet

The Project Plan Template sheet is a project sheet that houses all the information for your project and automatically feeds it to your associated reports and dashboards. Create a project sheet for each of your projects and use it to track all of the tasks and deadlines. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. It's best to enable dependencies for projects with deadlines to ensure every moving part in your project is tracked and on time, and ultimately meet your deadline.

This sheet is divided into two major sections: Project Information and Project Plan. This sheet is set up in Gantt View to provide a visual map for project phases and tasks in the Project Plan section.

The Project Information section is broken down into subsections that can be collapsed or expanded by clicking on the +/- button in the Primary column. The five subsections included under the Project Information section, work as follows:

A. General Information - In this section, you will capture general project information using the Details column. Brief Instructions are given in [brackets] in those cells highlighted in light green (rows 4 - 10).



Learn more:

Hierarchy: Indent or Outdent Rows

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Step 4 (continued):

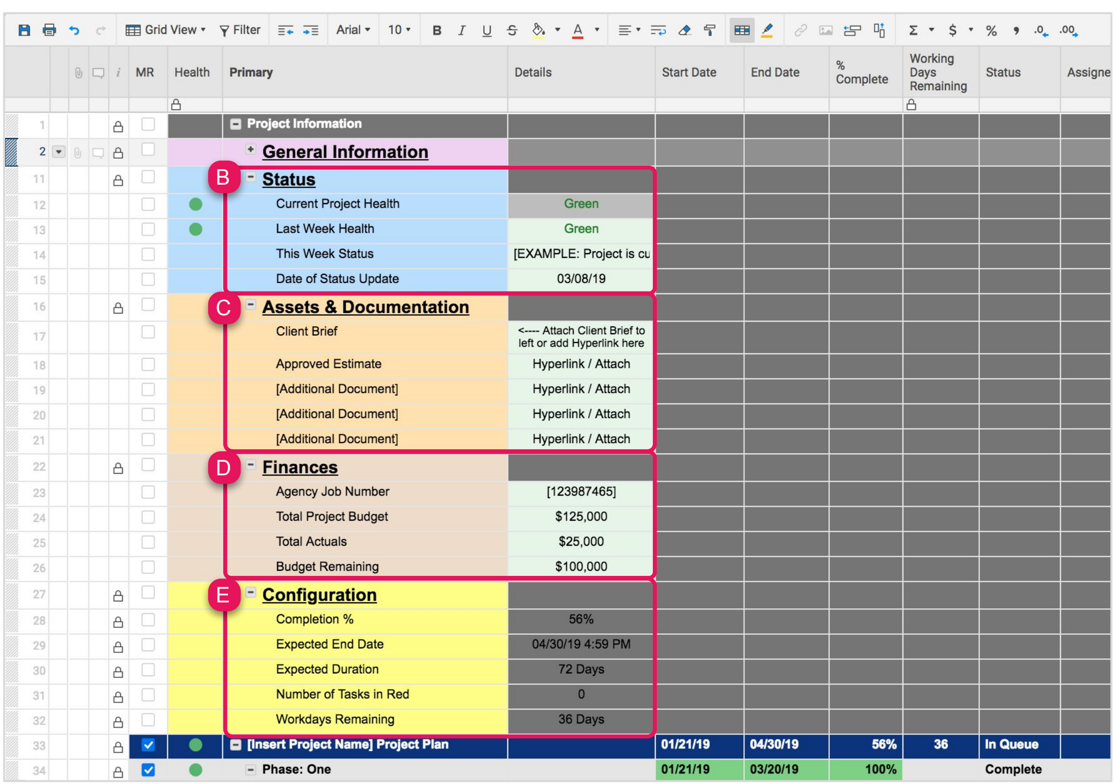
Project Plan Template Sheet

B. Status - This section captures the current health and status of the project. Row 12, Current Project Health, is formulated to automatically update based on information in the Project Plan section. The remaining rows in this section (13 - 15), you will update this information in the Details column highlighted in light green. For Last Week Health (row 13), you will manually type in the color representing the health of the project (Red, Yellow, Green, or Blue), then you will type in a brief description of This Week Status (in row 14), and conclude by typing in the Date of Status Update (row 15).

C. Assets & Documentation - In this section, you can include links or attach documents, such as briefs, that are essential to the project. Anyone who is the Owner of a sheet or has Admin or Editor access can add comments and attachments to any row. This keeps relevant information in context and creates a single source of truth for key details.

D. Finances - This section aids in accounting for your project budget. You will enter the information in the Details column for rows 23 - 25, updating them throughout the project timeline as necessary.

E. Configuration - In this section, you can get a quick glance at the project summary based on the Project Plan section. This section auto populates, so there is no need to update it manually.



Learn more:

Hierarchy: Indent or Outdent Rows

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Step 4 (continued):

Project Plan Template Sheet

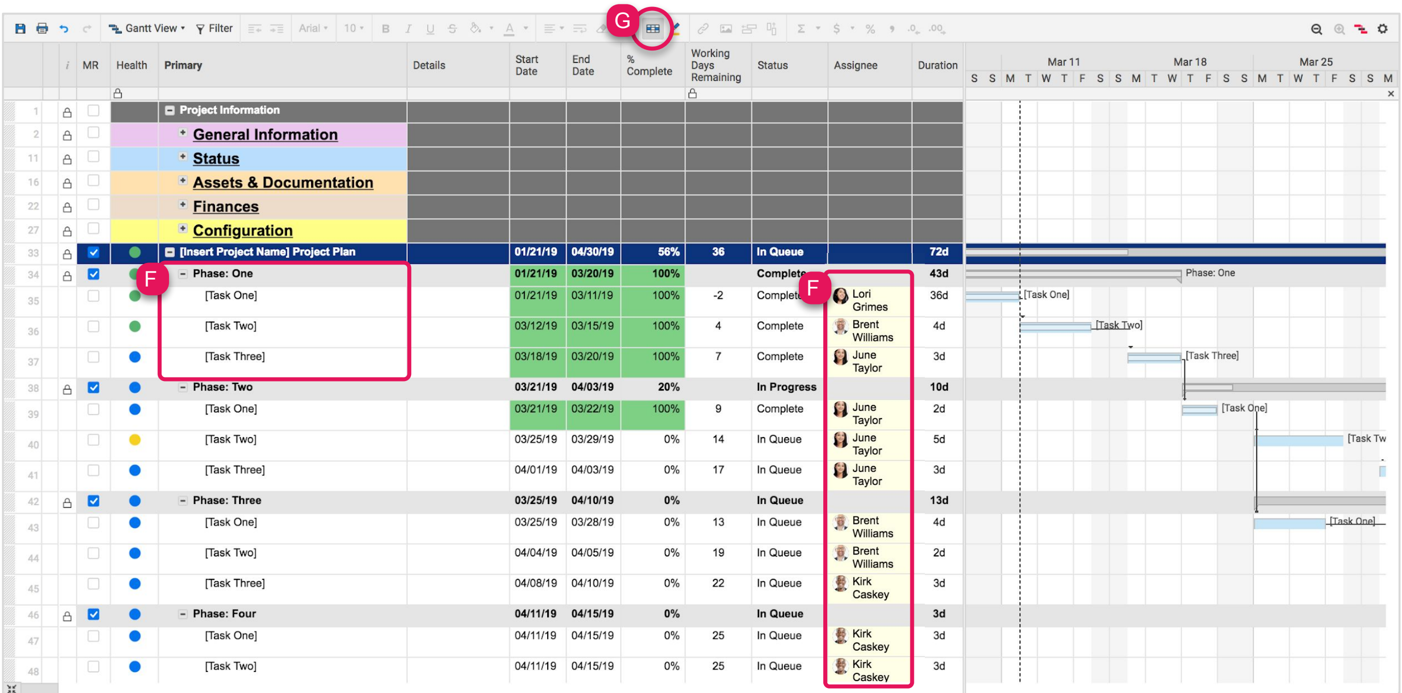
The Project Plan section is also broken down into subsections by phase of the project. In this section of the sheet, you will be utilizing more columns to capture comprehensive project information. Starting on row 35, enter dates in the Start Date and End Date columns.

The other data on your ancestor and parent rows, including Start Date, End Date, % Complete, and Duration are auto calculated by the tasks below the parent row. We have set up conditional formatting rules for this section, to visually enhance Start Dates, End Dates, and % Complete. In the Working Days Remaining column is a pre-populated formula that calculates the number of working days between today and the End Date column. The MR column is used to display only the project phases in the Project Milestones report. The Modified and Modified By columns are intentionally exposed to show who recently made adjustments and when.

F. In the Primary column, as the owner of the sheet, you can modify the names of the phases and tasks.

G. Customize, disable, or add the conditional formatting rules by clicking on the conditional formatting button in the top toolbar.

H. You assign tasks to the Assignee in the indicated column, which are *Contact List* column types. It's a best practice to use *Contact List* columns when assigning owners because they can be used to set automated actions, alerts, reports, and more.



	Primary	Details	Start Date	End Date	% Complete	Working Days Remaining	Status	Assignee	Duration
1	Project Information								
2	General Information								
11	Status								
16	Assets & Documentation								
22	Finances								
27	Configuration								
33	[Insert Project Name] Project Plan		01/21/19	04/30/19	56%	36	In Queue		72d
34	Phase: One		01/21/19	03/20/19	100%		Complete		43d
35	[Task One]		01/21/19	03/11/19	100%	-2	Complete	Lori Grimes	36d
36	[Task Two]		03/12/19	03/15/19	100%	4	Complete	Brent Williams	4d
37	[Task Three]		03/18/19	03/20/19	100%	7	Complete	June Taylor	3d
38	Phase: Two		03/21/19	04/03/19	20%		In Progress		10d
39	[Task One]		03/21/19	03/22/19	100%	9	Complete	June Taylor	2d
40	[Task Two]		03/25/19	03/29/19	0%	14	In Queue	June Taylor	5d
41	[Task Three]		04/01/19	04/03/19	0%	17	In Queue	June Taylor	3d
42	Phase: Three		03/25/19	04/10/19	0%		In Queue		13d
43	[Task One]		03/25/19	03/28/19	0%	13	In Queue	Brent Williams	4d
44	[Task Two]		04/04/19	04/05/19	0%	19	In Queue	Brent Williams	2d
45	[Task Three]		04/08/19	04/10/19	0%	22	In Queue	Kirk Caskey	3d
46	Phase: Four		04/11/19	04/15/19	0%		In Queue		3d
47	[Task One]		04/11/19	04/15/19	0%	25	In Queue	Kirk Caskey	3d
48	[Task Two]		04/11/19	04/15/19	0%	25	In Queue	Kirk Caskey	3d

Learn more:

[Use the Best Column Type for Your Data](), [Apply Formatting Automatically with Conditional Formatting Rules](), [Managing Contacts,]() [Gantt Chart with Dependencies]()

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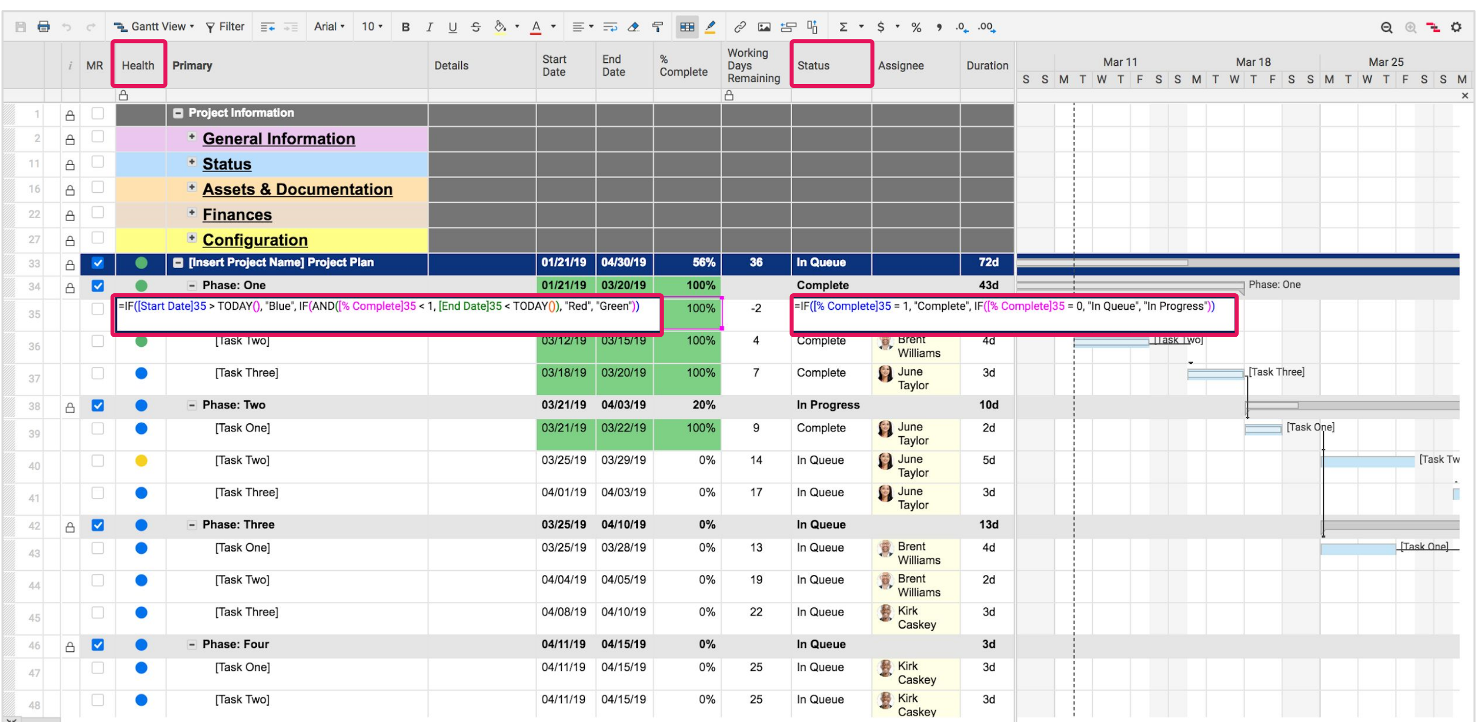
Step 5:

Using the Pre-Built Formulas in the Health and Status Columns

The Health column helps keep track of the status of your tasks, phases, and overall health of the project using RYGB ball symbols. This column is already pre-formulated to display a color to indicate whether the item's health status is Red, Yellow, Green, or Blue. The Health column operates by a formula that looks at the Date columns and % Complete column. If the Start Date is greater than today, then display blue ball. If % Complete is less than 100% and if the End Date is less than today, then display red ball. If neither of those are true, then display green ball.

In the Status column, you will find a *Dropdown List* that will allow you to indicate if a task or phase is In Queue, In Progress, Complete, or on Hold. This column is already pre-formulated to automatically update the status based on the % Complete column; if % Complete is equal to 1 then Status is Complete, if % Complete is equal to 0 then Status is In Queue, or if neither of those are true then Status is In Progress.

Rows and columns are locked to prevent editors from manipulating the information in the cells.



Learn more:

[Create and Edit Formulas in Smartsheet]

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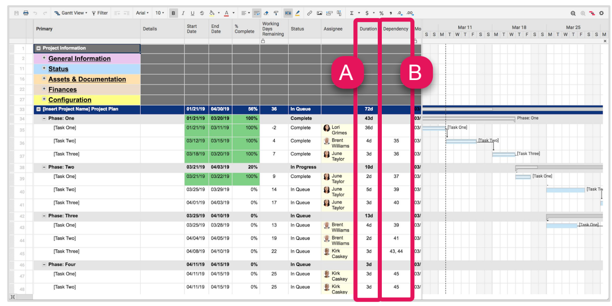
Step 6:

Adjust Durations & Dependency

Duration and Dependency are two unique column types that exist in project sheets.

A. Set the duration of each task in the Duration column.

B. Set dependency, or relationships between tasks, in the Dependency column.



Learn more:

[Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors](), [Enable Dependencies and Use Predecessors]()

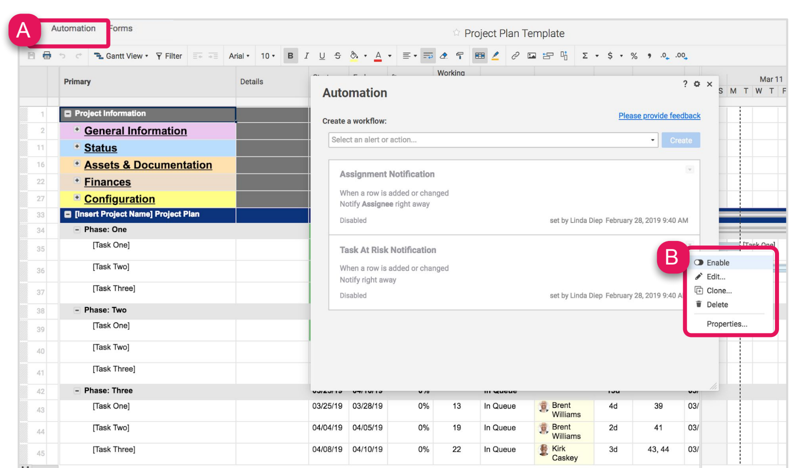
Step 7:

Assignment and Task-At-Risk Alerts

An alert workflow is a great way to keep track of project tasks. The Assignment Notification or Task At Risk Notification are set to notify the Assignee right away once they have been assigned a task or if one of their assigned tasks becomes at risk.

A. Modify the alert workflow by going to *Automation* and select *Manage Workflows* in the dropdown menu. Then double-click on the workflow you would like to modify in order to open the editor window. Customize the workflow however you like and then click *Save.*

B. The workflows are initially set on "disabled". To enable them, go to Automation and select *Manage Workflows* in the dropdown menu. Click on the menu icon (upside down triangle) on the individual alert, and switch the toggle to the right to enable.



Learn more:

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

Step 8:

Switch to Card View to Visualize Your Requests Differently

Card view is a great way to visually manage the status of each asset. You can view each asset as a card and move the card between lanes to update the dropdown value. Cards are categorized into lanes, driven by *Dropdown List*, *Contact List*, and *Symbol* columns in your sheet. Changes made by moving cards across lanes, adding a new card or lane, or editing cards will automatically reflect in grid, Gantt, and calendar views.

A. Select *Card View* in the toolbar to switch from grid view to card view. The default view will be lanes by Health.

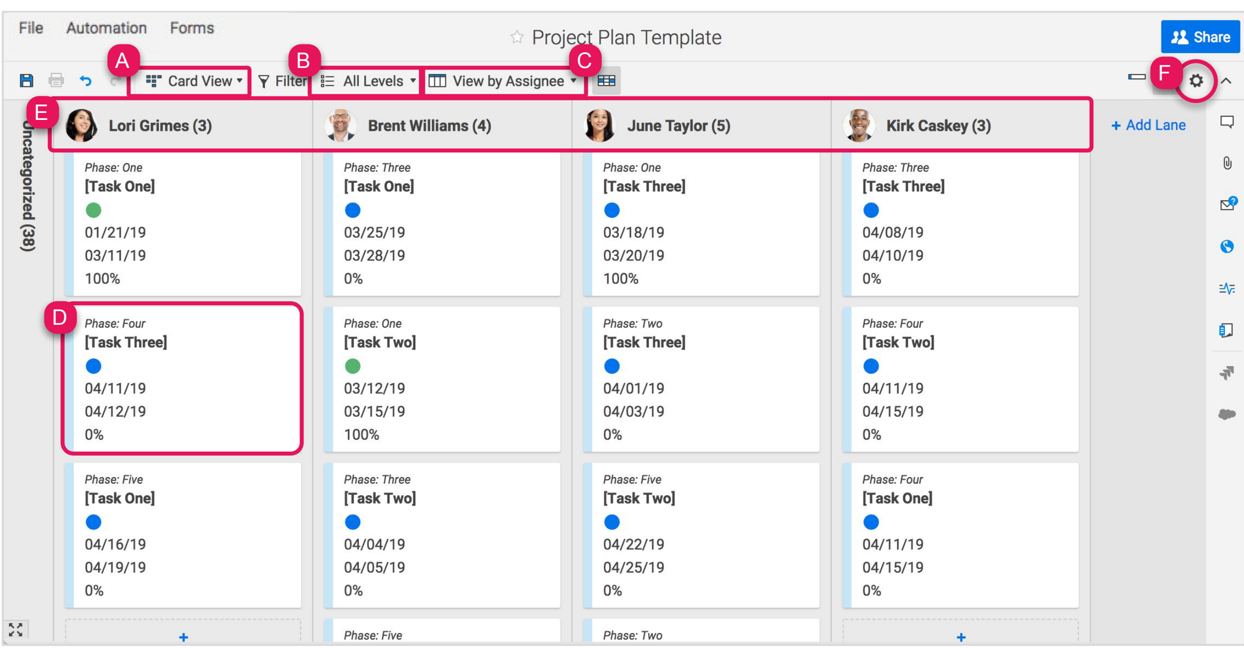
B. You can also broaden cards by using *Levels*. Click on “Level 1” and select “All Levels”. This will display all of your cards in all levels of your hierarchy.

C. Change your *View by* to Assignee in the toolbar to see your tasks grouped by their Assignee in lanes.

D. Update the assignee of the task by moving the card across lanes or double click on the card to edit the data.

E. Add contacts to your card view lanes by adding contacts to your preferred contact list in the Assignee column properties under Values.

F. Click on the gear icon in the upper right hand corner to adjust your card view settings and define which fields you want to display in your cards



Learn more:

[Use Card View to Visualize Your Project]

Step 9:

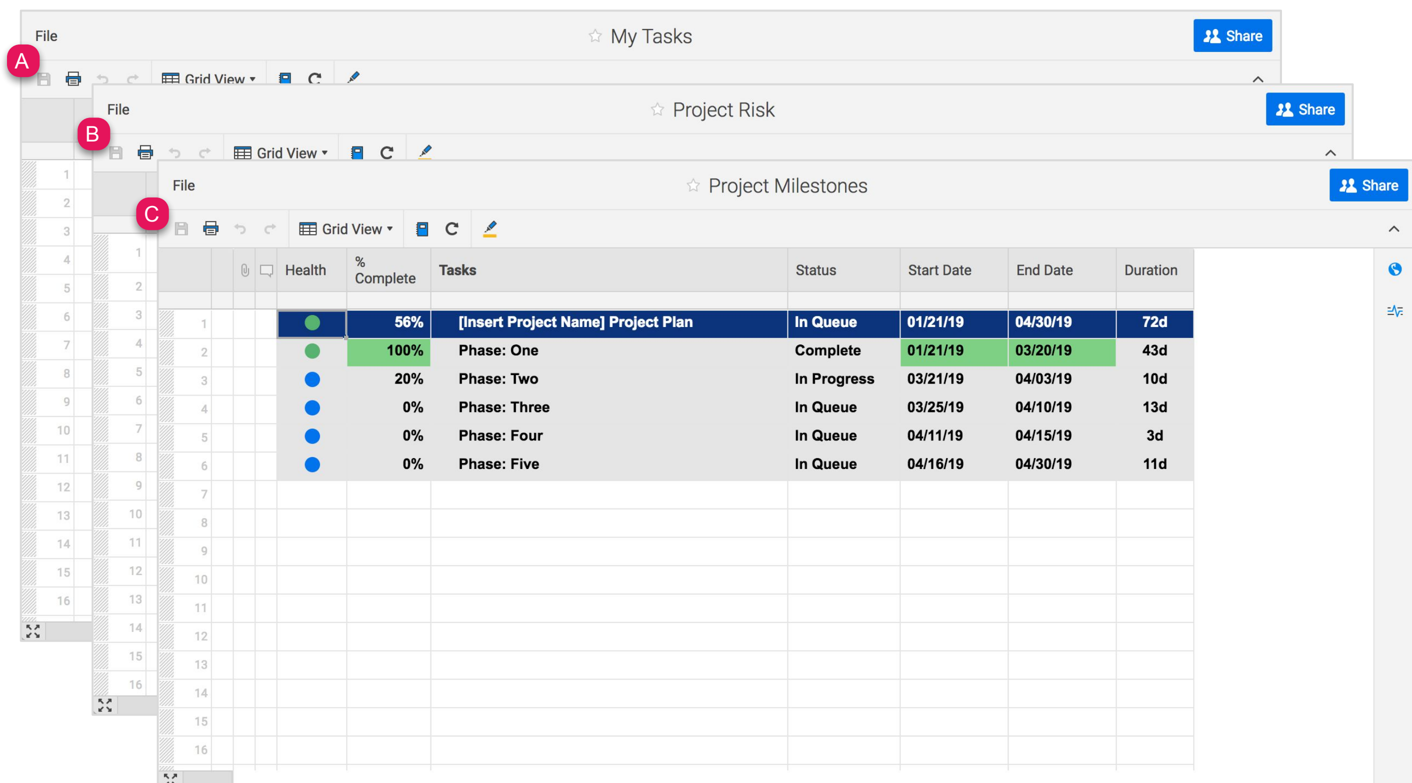
Associated Live Reports

Use reports to create cross-sheet filtered lists of the tasks that meet certain criteria. Three reports are already set up based on the Project Plan Template sheet. If you want to make any changes to the criteria used for the report, open the report and click on *Report Builder* and set your criteria. Reports are live, so as the data is updated, it will be reflected automatically on associated reports. This set includes the following reports, which are also surfaced in the Project Dashboard.

A. My Tasks - This report shows all tasks that are assigned to the current user signed in.

B. Project Risk - This report shows all project tasks and their assignee that have a Health column status of Red or Yellow.

C. Project Milestones - This report is a snapshot of the project plan at the phase level reflecting the health, % complete, phase, status, start date, end date, and duration.



Learn more:

Creating Reports, Share Sheets, Reports, and Dashboards

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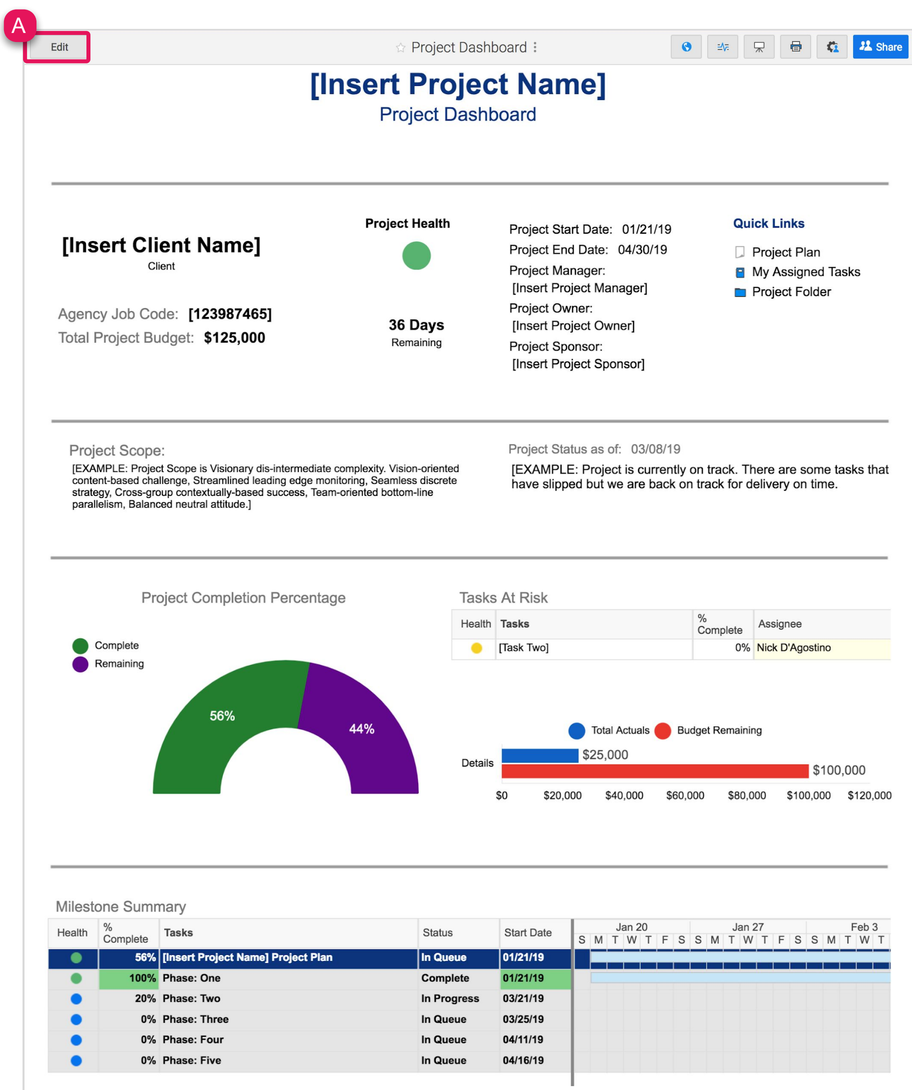
Step 10:

Customize the Project Dashboard

The information you've inputted on the Project Plan Template sheet will appear on this Project dashboard. As you manage the project schedule, issues, and allocations, it will appear through the dashboard centralizing your project reporting for easy sharing with management leadership team and clients.

A. This dashboard is already set up for you; however, if you wish to do some customization, you can click *Edit* in the upper left corner.

B. To learn more about each widget or to modify them, hover over the widget and select the *pencil icon*.



Learn more:

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

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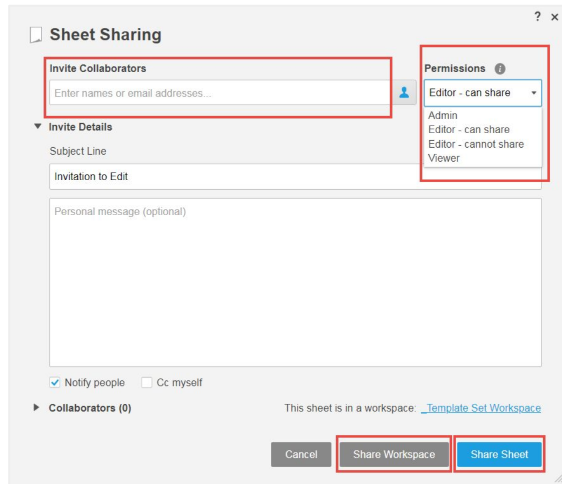
Step 13:

Share Your Project Schedule Management Template Set

Sharing is the best way to collaborate with others involved in your project. You can share your entire workspace with key stakeholders, or you simply 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 Project Schedule Management Template Set! Share your feedback here.