



# Project Tracking and Rollup

## Template Set Getting Started Guide

The Project Tracking and Rollup template set is the quick and easy way to get a project up and running, and report on risks and milestone to stakeholders.

# Project Tracking and Rollup

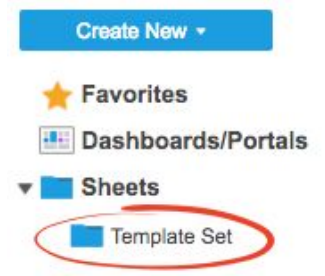
## Template Set Getting Started Guide

**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.

[Project Tracking and Rollup Template Set](#)

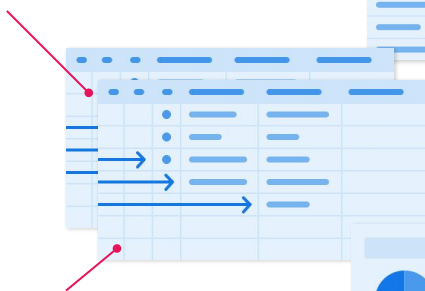


## What's Included in the Set

With the Project Tracking and Rollup template set, you can accelerate work execution and run more effective projects.

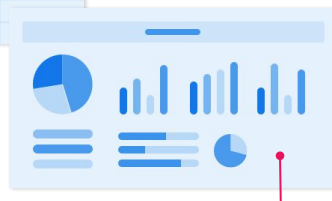
### Project Milestones Report

Track critical project milestones.



### At Risk Report

A running log of at-risk tasks.



### Project Plan Sheet

Track all of the tasks and deadlines for your project.



### Project Rollup Dashboard

A dashboard that summarizes key project details.



# Project Tracking and Rollup

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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.

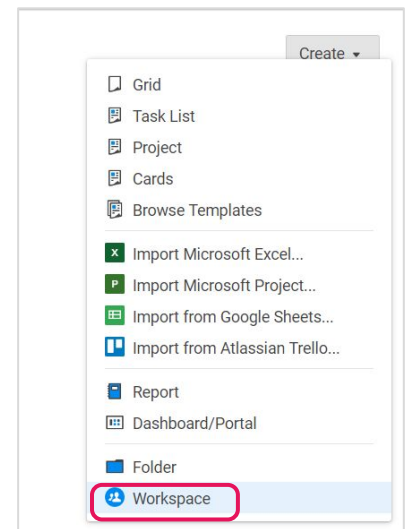
Step 1:

#### 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](#)



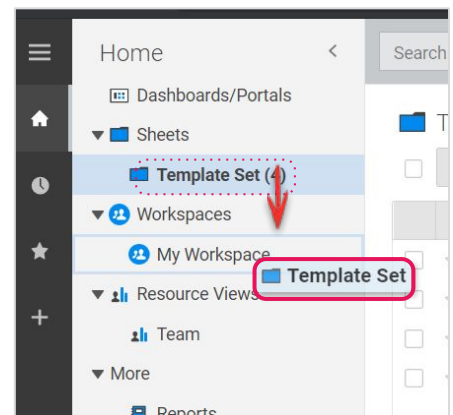
Step 2:

#### 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 Project Plan Sheet

Use the Project Plan sheet to track and maintain critical data about a project. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. The project plan will automate your project timeline from the start date forward and will provide an estimated end date based on project tasks. It's best to enable dependencies for projects with deadlines to ensure every milestone in your project is tracked and on time, and ultimately meet your deadline.

- A. In the Task Name column, name the project phases in the parent (light gray) rows.
- B. Use the indented grandchild (white) rows in your hierarchy, to enter tasks in the Task Name column.
- C. Starting on row 3, enter dates in the Start Date and End Date columns.
- D. 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.
- E. Attach documents or links to webpages to the row in the Attachment (*paperclip* icon) column to keep all of your project information and resources in one place.
- F. 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). Conditional formatting rules apply formatting automatically to rows or cells based on the values they contain.

	At Risk	Task Name	Status	Assigned To	Start Date	End Date	% C	Mar		
								Mar 4	Mar 11	Mar 18
		PROJECT NAME			03/05/18	04/24/18				
		Planning			03/05/18	04/02/18				
		Project Kickoff	Not Started	Example Name	03/05/18	03/09/18				Project Kickoff
		Activity 1	On Hold	Example Name	03/12/18	03/15/18				Activity 1
		Activity 2	Complete	Example Name	03/16/18	03/26/18				
		Activity 3	In Progress	Example Name	03/27/18	03/29/18				
		Collect Deliverables	Not Started	Example Name	03/30/18	04/02/18				
		Execution			04/03/18	04/11/18				
		Kickoff Activity	Not Started		04/03/18	04/03/18				
		Phase 1	Not Started		04/04/18	04/06/18				
		Activity 1	Not Started		04/04/18	04/04/18				

**Learn more:**

[Project Management and Gantt Charts](#), [Hierarchy: Indent or Outdent Rows](#), [Date Column Type](#), [Parent Rollup Functionality](#), [Upload an Attachment](#), [Symbols Column Type \(i.e. Status symbols, Decision symbols, etc.\)](#), [Using Column Symbols](#), [Apply Formatting Automatically with Conditional Formatting Rules](#)

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Step 4:

### Adjust Durations & Predecessors

“Duration” and “Predecessor” are two unique column types that exist in project sheets.

- A. Set the duration of each task in the “Duration” column.
- B. Set predecessors, or relationships between tasks, in the “Predecessors” column.

Start Date	End Date	% Complete	Duration	Predecessors
03/05/18	04/24/18	28%	37d	
03/05/18	04/02/18	50%	21d	
03/05/18	03/09/18	0%	5d	
03/12/18	03/15/18	30%	4d	3
03/16/18	03/26/18	100%	7d	4
03/27/18	03/29/18	75%	3d	5
03/30/18	04/02/18	0%	2d	6

Learn more:

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

Step 5:

### Assign Tasks to Team Members

Assign tasks to individuals by adding their email addresses in the Assigned To column. A contact includes both the name and email address, which drives delivery of automated actions, alerts, reports, and more.

- A. Add contacts in the Assigned To column by individually creating a new contact, or adding an existing contact from your *Contact List*.

Task Name	Status	Assigned To
PROJECT NAME		
Planning		
Project Kickoff	Not Started	Example Name
Activity 1	On Hold	Example Name
Activity 2	Complete	Example Name
Activity 3	In Progress	Example Name
Collect Deliverables	Not Started	Example Name

Learn more:

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

# Project Tracking and Rollup

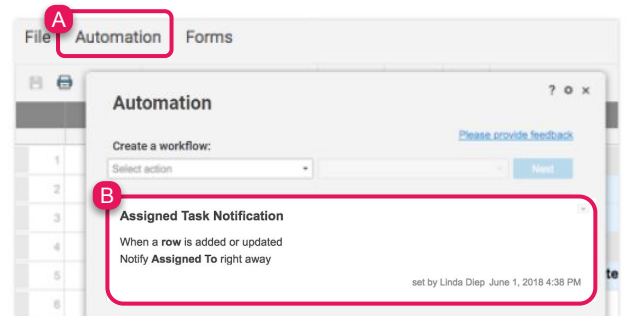
## Template Set Getting Started Guide

Step 6:

### Adjust Alert

An automatic alert workflow is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. An alert has been set on the project sheets to notify anyone shared to the sheet right away when a new task has been assigned to them.

- A. To edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.
- B. Then double-click on the workflow itself in order to edit the criteria.



#### Learn more:

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

# Project Tracking and Rollup

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Step 7:

### Recurring Reminder

An automated recurring reminder is a great way to save time and keep track of deadlines. The Recurring Incomplete Task 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 current Status is On Hold, Not Started, or In Progress. 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 screenshot displays the Smartsheet Automation editor interface. On the left, a sidebar menu shows 'Automation' selected, with 'Manage Workflows...' highlighted. A red box labeled 'A' is around this menu. The main editor area shows a workflow named 'Recurring Incomplete Task Alert'. Below it, another workflow 'Alert Assigned To' is visible. A red box labeled 'B' highlights the 'Trigger' section of the 'Recurring Incomplete Task Alert' workflow, which is set to 'When a date is reached' with a dropdown menu open showing options: 'Every day starting on 06/18/19', 'Run once', and 'Custom...'. A red box labeled 'C' highlights the 'Conditions (3)' section, which includes three conditions: 'Where Assigned To is not blank', 'and where Status is one of' (with buttons for 'On Hold', 'In Progress', 'Canceled', and 'Not Started'), and 'and where End Date is in the next (days) 3'. A red line connects the 'A' box to the workflow name, and another red line connects the 'B' box to the trigger dropdown.

Learn more:

[Alerts & Reminders](#)

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## Template Set Getting Started Guide

Step 8:

### 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. The Project Plan sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the status of tasks and the count of those at risk. 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.

- 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.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- 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.

The screenshot shows the Smartsheet interface with a Gantt chart on the left and a Sheet Summary panel on the right. The Sheet Summary panel is titled "Sheet Summary" and includes a "Please provide feedback" link. Below the title, there is a section "WHAT IS SHEET SUMMARY?" with a description: "Sheet Admins can define, organize, and report on critical information in this sheet with Sheet Summary such as team contacts, metrics, and deadlines." The panel displays several metrics with input fields: "Total At Risk" (22), "Status Total: Not Started" (28), "Status Total: In Progress" (1), "Status Total: Complete" (1), and "Status Total: Canceled" (1). At the bottom of the panel, there is a "+ New Field" button. A red circle 'A' highlights the sheet summary icon in the right sidebar, and a red circle 'B' highlights the "+ New Field" button.

Learn more:

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



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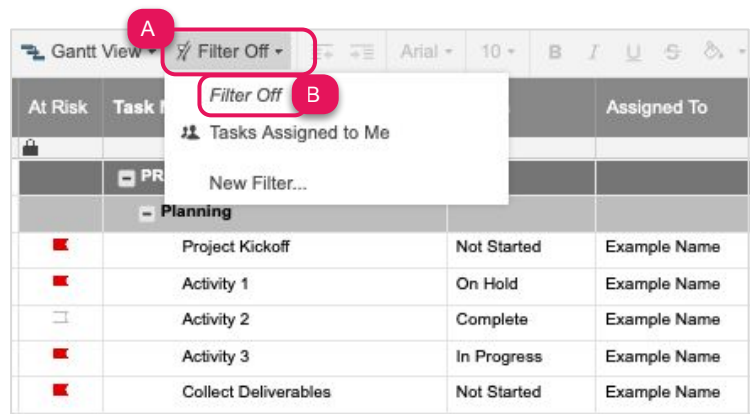
## Template Set Getting Started Guide

Step 9:

### Update Status and Filters

After the task has been assigned, the task owner can update the status by selecting an option from a custom dropdown list in the Status column. If there are multiple owners, filters are an ideal way to help people cut through the noise. On the Project Plan sheet, we created a shared filter called *Tasks Assigned to Me*. Anyone viewing the sheet can select that filter and see only their assigned items.

- A. Click on the *Filter* button and select *Tasks Assigned to Me* to see tasks assigned to the current user viewing the sheet. You can also select any of the other filter options to perform other tasks.
- B. Select the *Filter Off* button in the toolbar to create, use, or modify filters.



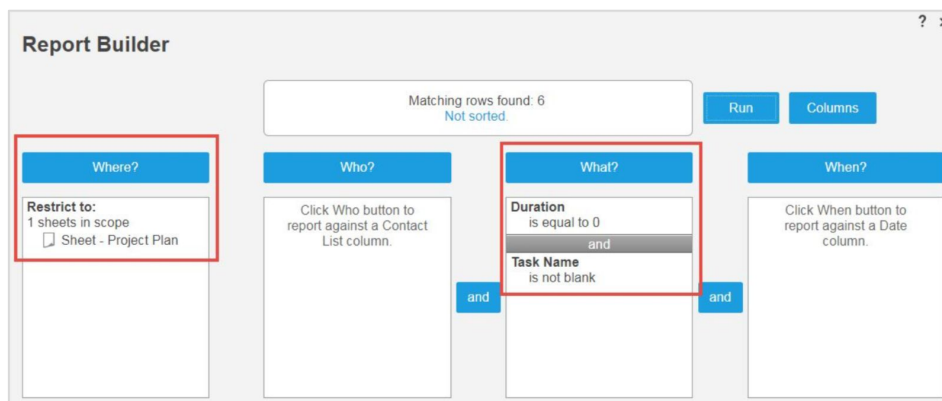
Learn more:

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

Step 10:

### View the Project Milestone Report

The Project Milestones Report tracks all the critical project milestones by displaying any rows where the duration *is equal to 0* (the definition of a milestone), and the *Task Name is not blank*. The information in this report also appears on the Project Rollup Dashboard.



Learn more:

[Reports](#)

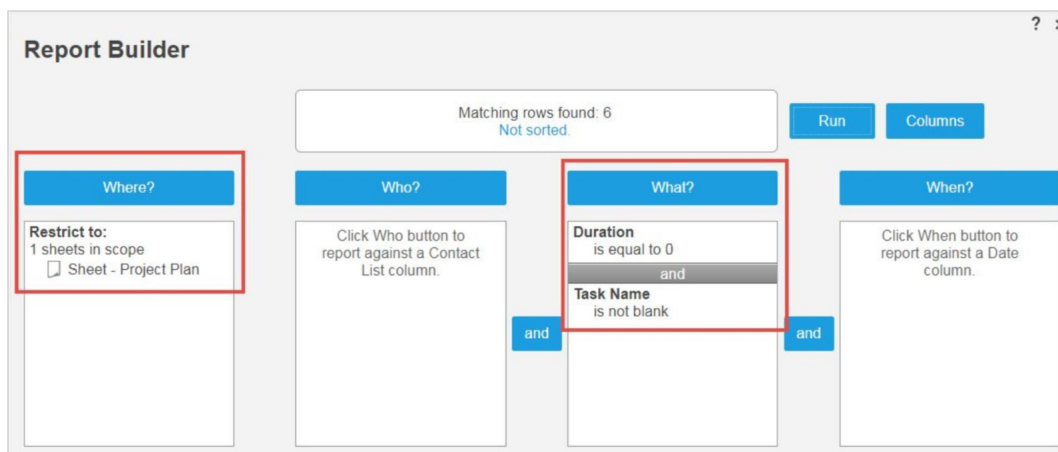
# Project Tracking and Rollup

## Template Set Getting Started Guide

Step 11:

### Use the At Risk Report

A task is automatically flagged as *At Risk* if the status is not *Complete* and the *End Date* is in the past. This report surfaces all at-risk tasks in one view, and also displays them on the Project Tracking and Rollup dashboard.



Learn more:

[Reports](#)

Step 12:

### Use the Unique Formulas

The At Risk column on the project plan leverages a formula to automatically flag Tasks that have an End Date in the past and do not have a status of *Complete*. The formula looks like this:

**=IF(AND([End Date]3 < TODAY(), NOT(Status3 = "Complete")), 1, 0)**

The logic states that if the *End Date* is less than today (in the past) and status is not *Complete* then 1 (flag the row as at risk). If these statements are not true, then 0 (do nothing), and don't flag the row as at risk.

At Risk	Task Name	Status	Assigned To
🔒			
	- PROJECT NAME		
	- Planning		
	=IF(AND([End Date]3 < TODAY(), NOT(Status3 = "Complete")), 1, 0)		
🚩	Activity 1	On Hold	Example Name
🚩	Activity 2	Complete	Example Name

Learn more:

[Formulas and Functions](#)

# Project Tracking and Rollup

## Template Set Getting Started Guide

### Customize

Step 13:

### Monitor Your Project Tracking and Rollup Dashboard

The Project Tracking and Rollup dashboard is the keystone of your template set. It pulls together all of the critical project information you need to track. Dashboards are made of different widgets that pull in real-time information from your sheets and reports.

- A. Click *Edit* in the upper left corner of the dashboard to begin customizing. Hover your mouse over any widget and select the *pencil icon* to start modifying the widget and its contents.
- B. Project Information is a *Metric* widget that summarizes key project data in your project plan.
- C. Key Project Links and Key Resources are *Shortcut* widgets that you can use to link sheets, reports, and other resources that reside outside of Smartsheet.
- D. Update the Key Contacts with information about your team.
- E. Both Project Milestones (not shown below) and At Risk Tasks are *Report* widgets, which display your live reports in your dashboard.

**Project Rollup Dashboard**

**Project Information**

03/05/18  
Project Start Date

04/24/18  
Project End Date

28%  
Percent Complete

**Key Project Links**

- Sheet - Project Plan
- Report - At Risk Tasks
- Report - Project Milestones

**Key Resources**

- Milestone Review.pptx
- Strategic Plan Template
- Team Calendar
- Policies.pdf
- BI Request Form
- After Action Review.xlsx
- Proposal Template.docx

**Key Contacts**

Portfolio Mgr: Harry H.  
Business Owner: Jon A.  
Exec Sponsor: Jerome S.  
Legal: Harriet K.  
Staffing: Margot B.  
Compliance: Mark K.  
Design: Sonia J.  
IT Support: Susan E.  
Finance: Tyler M.  
Public Relations: Daniel O.

**At Risk Tasks**

At Risk	Task Name	Status	Assigned To	Start Date	End Date	% Complete
■	Project Kickoff	Not Started	Example Name	03/05/18	03/09/18	0%
■	Activity 1	On Hold	Example Name	03/12/18	03/15/18	30%

**Learn more:**

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

# Project Tracking and Rollup

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Step 14:

### Share Your Project Tracking and Rollup 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](#).

The screenshot shows the 'Sheet Sharing' dialog box. The 'Invite Collaborators' section has a text input field. The 'Permissions' dropdown is set to 'Editor - can share'. The 'Notify people' checkbox is checked. The 'Collaborators' section shows 0 collaborators. The 'Share Workspace' and 'Share Sheet' buttons are highlighted with red boxes.

Learn more:

[Workspace Sharing](#)