smartsheet

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.

smartsheet.com
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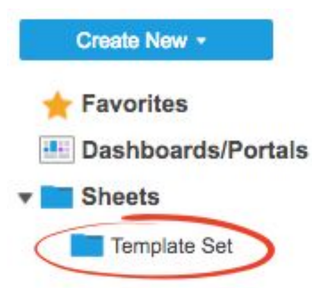
REQUIREMENTS: This template set is designed for **Business and Enterprise Plan** users. If you're on a Team or Individual plan, you can still use this template set, however, premium features, such as dashboards, Automated Actions, and Activity Log will not be available. Identify your plan and user type.

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.

Project Plan Sheet
Track all of the tasks and deadlines for your project.

At Risk Report
A running log of at-risk tasks.

Project Rollup Dashboard
A dashboard that summarizes key project details.

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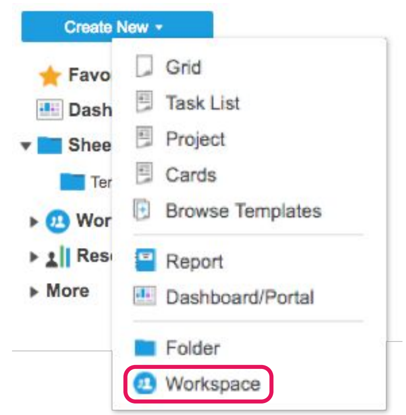
Set Up

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*, click the *Create New* button, and select *Create New Workspace* from the drop-down menu. Name the workspace.

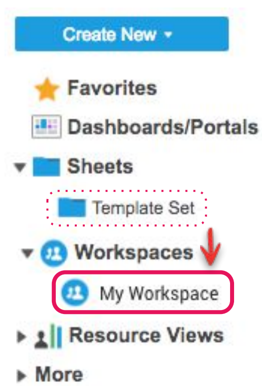
Learn more:
Workspaces Overview, Workspace Sharing, Home Tab



Step 2:
Drag the Files into the Workspace

Select the template set folder under your *Sheets* folder and drag the entire folder over to the workspace you just created. Once the workspace is highlighted, drop it in the folder.

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.

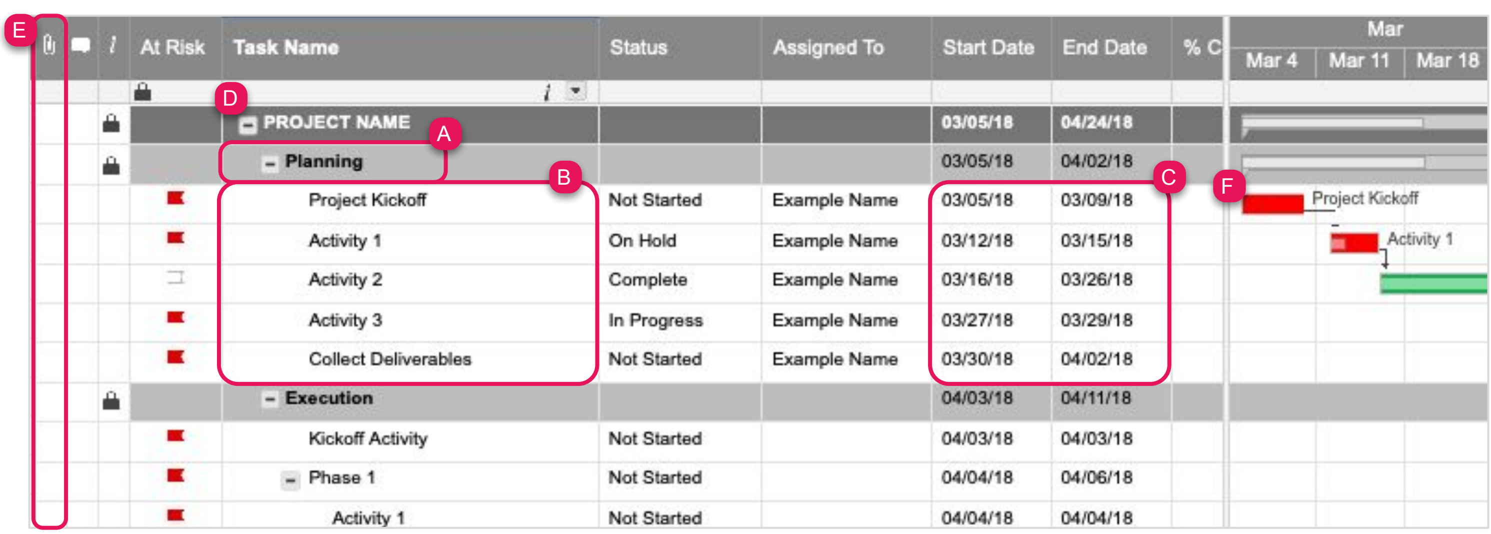
B. Use the indented grandchild (white) rows in your hierarchy, to enter tasks in the Task Name column.

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.



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	Predecess.
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, notifications, 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]

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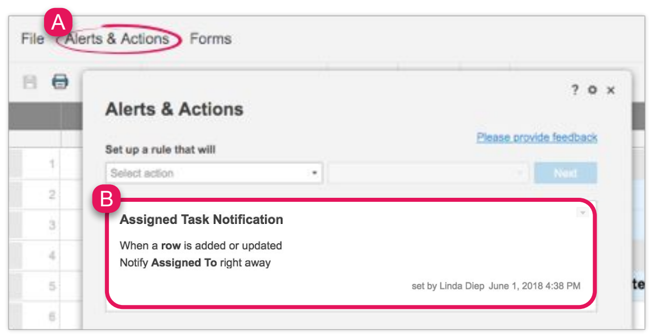
Step 6:

Adjust Notification

An automatic notification is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. A notification 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 notification rule, click on *Alerts & Actions* and select *Manage Alerts & Actions* in the dropdown menu.

B. Then double click on the rule itself in order to edit the rule criteria.



Learn more:

[Notifications: Keep Track of Sheet Changes](), [Control Who Can Receive Notifications from Your Sheet]()

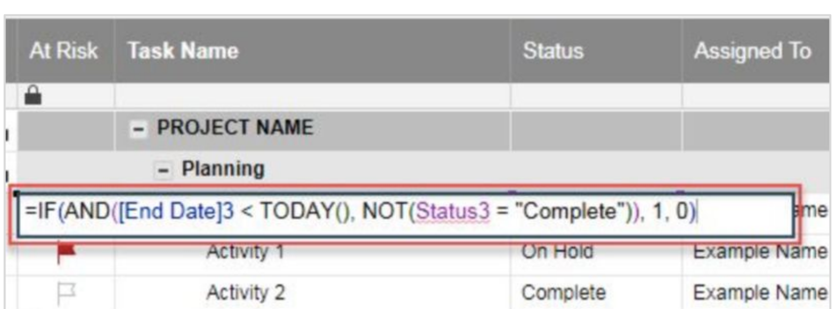
Step 7:

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.



Learn more:

[Formulas and Functions]()

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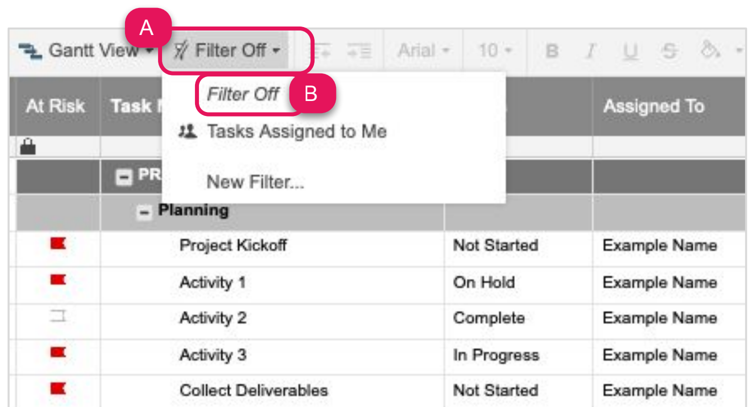
Step 8:

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.



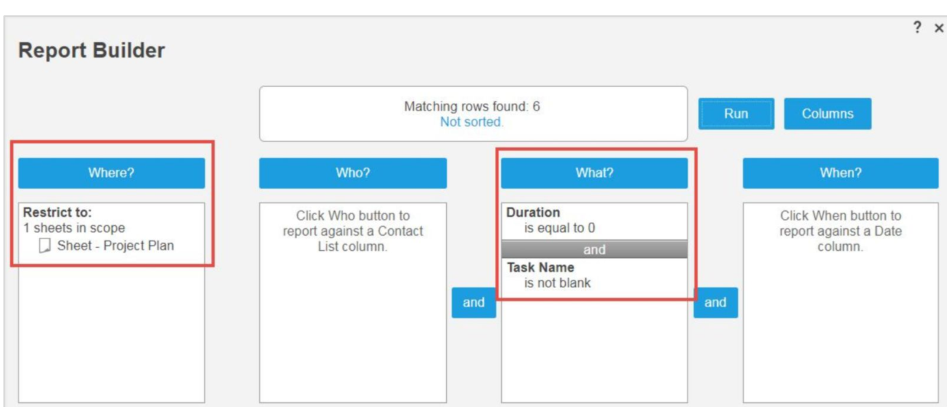
Learn more:

Dropdown List, Filters, Shared Filter

Step 9:

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

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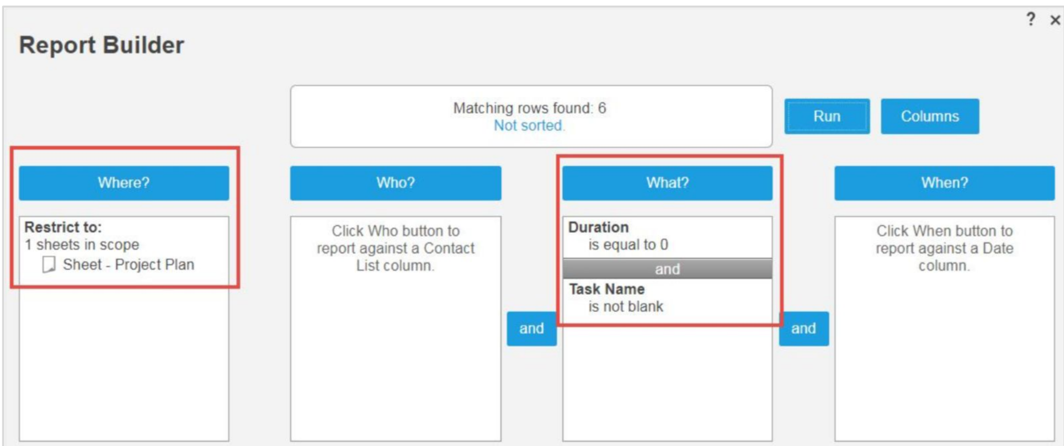
Step 10:

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]

Customize

Step 11:

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.

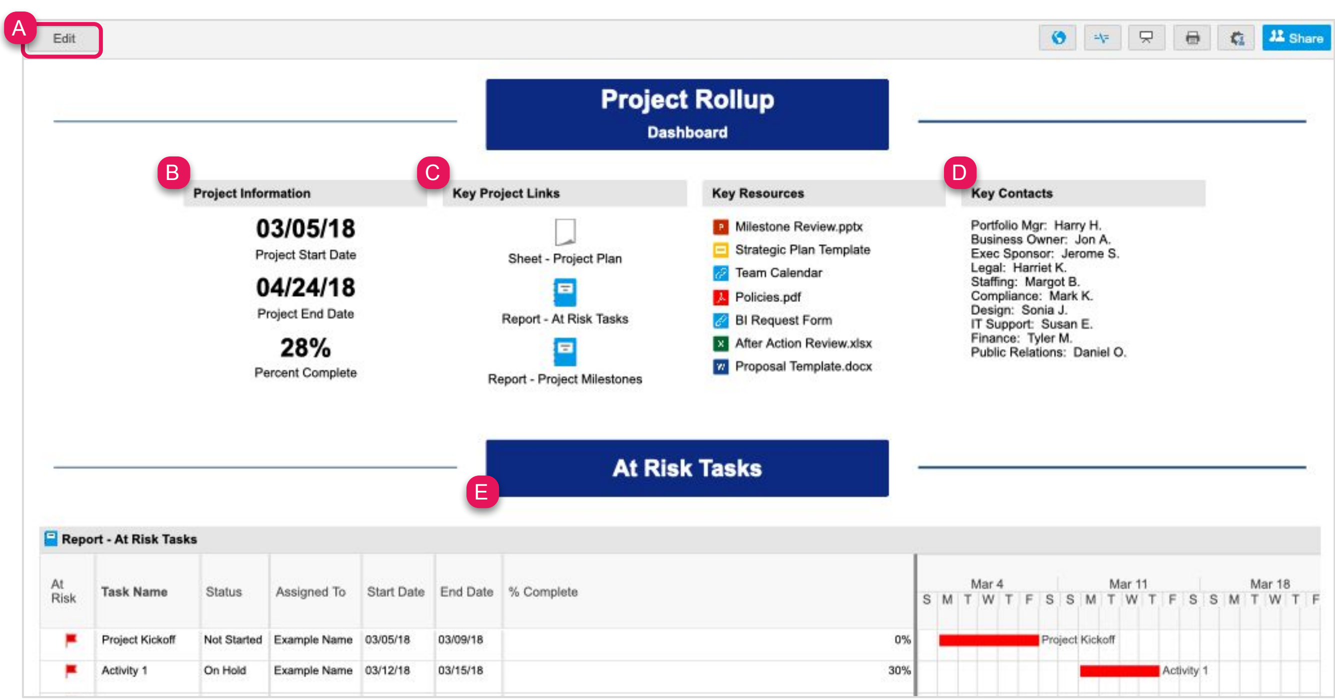
A. Click *Edit* in the upper left corner of the dashboard to begin customizing. Hover your mouse over any widget and select the *pencil icon* to start modifying the widget and its contents.

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.



Learn more:

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

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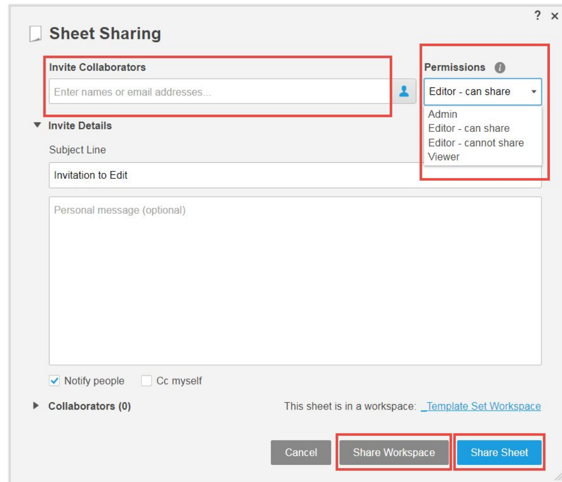
Step 12:

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.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the Project Tracking and Rollup template set! Share your feedback here.