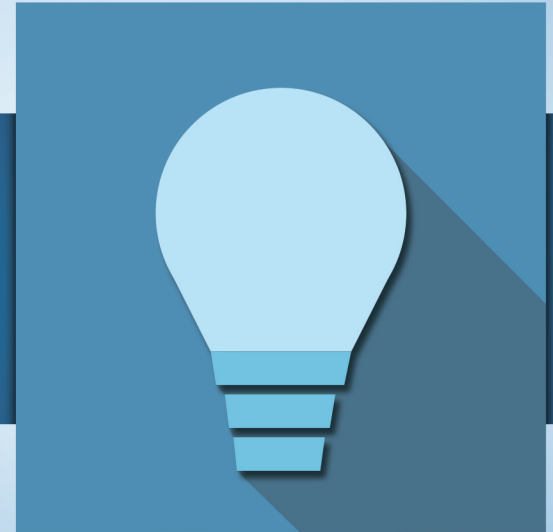


Solution Guide

PROJECT .02

Knowledge Management

Find it online: smartsheet.com/pm-solutions/knowledge-management



Coordinate Anything

About Knowledge Management

Good knowledge management increases productivity, improves the quality of project outputs and drives consistency across deliverables. Smartsheet not only helps you capture, organize and centralize program resources, but it also helps you turn project learnings into organizational assets. This guide is built to help you use Smartsheet to achieve your knowledge management goals.

Centralize program knowledge

Create wiki-like sheets to leverage program stakeholders' collective knowledge.

Improve project delivery consistency

Publish and share templates and methodologies so your project managers can focus on delivery excellence.

Increase project team productivity

Reduce new resource ramp-up time with role transition templates and onboarding checklists.

Easily preserve and transfer learnings

Document, archive, and transfer task guidance, project documents and deliverables, roles and responsibilities.



Who should use this guide?

Whether you're establishing new knowledge management processes or seeking ways to improve your current ones, you're in the right place.

Common roles/titles who would benefit from this solution include:

Program Managers

Project Managers

Knowledge Managers

Knowledge Editors

Knowledge Analysts

Business Analysts

Business Consultants

Subject Matter Experts

Operations Managers

Operations Specialists

What You'll Learn

This guide is designed to show you how you can build and execute world-class knowledge management processes to support your project teams with Smartsheet. This guide will cover the following:

- 1 An overview of the solution
- 2 A tour of the individual sheets
- 3 How to get going
- 4 Helpful resources and cheat sheets



Components

1 ORGANIZE

Program Resources

Onboarding Checklist

Organize program information in a central location for easy reference.

2 PUBLISH

Templates & Methodologies

Program Glossary

Drive consistency across projects by publishing templates and methodologies.

3 TRANSFER

Deliverables Archive

Project Closeout Form

Role Transition

After Action Review

Preserve the deliverables and learnings from your projects.

Program Resources

Sharing program resources and information with project stakeholders is harder than it needs to be. Instead of using a patchwork of applications, shared folders, intranets and emails to share information, use Smartsheet as a single wiki-like repository. Smartsheet makes it easy to compile, share and update information that lives in a variety of formats.

The screenshot shows a Smartsheet spreadsheet titled "Program Resources" with columns for "Item", "Details", "Contact or Link", and "Last Modified". The spreadsheet lists various resources under a "Policies" section, including "Expenses", "Time Reporting", and "Team Vacation Calendar". Each row contains a description, a link to a form or calendar, and a "Last Modified" date. Callout A points to the "Expenses" row, B to an "Attach" menu, C to a "Share Workspace" dialog box, and D to the "Last Modified" column.

Item	Details	Contact or Link	Last Modified
Program Resources			
Policies			
Expenses	All salaried and non-salaried project resources are required to submit their expenses through the Expense Tracking form. Fixed price contract resources are excluded.	Expense Tracking Form	06/15/15 04:02 PM
Time Reporting	Salaried and hourly resources are required to submit their time worked on a weekly basis.	Time Reporting Form	06/15/15 04:02 PM
Team Vacation Calendar	Enter all planned vacation time in the Team Vacation Calendar.	Team Vacation Calendar	06/15/15 03:42 PM
Aliases & Contacts			
Policy Information	Please direct any policy questions to the appropriate person.	policy@programname	06/15/15 03:42 PM
Travel Support	The travel support office is available from 7a-9p on weekdays and 9a-3p on weekends.	travel@programname	06/15/15 03:42 PM
Technical Support	The program technical support desk is available on floor 3 during standard business hours. Use the IT support request form to submit a ticket.	IT Support Request	06/15/15 03:54 PM
Program Information			
Program Communications			
Monthly Program Newsletter		newsletter@programname	06/15/15 04:08 PM
Travel Information			
Hotels		Hyatt, Marriott, Days Inn	06/15/15 03:54 PM
Airports		Dulles International Airport	06/15/15 03:54 PM
Maps		Bing Maps	06/15/15 03:54 PM

- A** Link to supporting information, like expense or time tracking forms.
- B** Attach any type of document, like detailed policy information or past newsletters.
- C** Easily share the sheet with custom permission levels so topic owners can keep their information up to date.
- D** Use columns that can auto-update, such as “Last Modified” date, so others know how recent the information is.

A Create a custom sheet to personalize the onboarding experience.

B Check off tasks as they are completed so managers can see progress.

C Emphasize the most important items, using conditional formatting to highlight the row.

D Set email reminders so nothing is missed during the chaos of onboarding.

E Save the onboarding sheet as a template for easy reuse.

Onboarding Checklist

Someone's role in a project is not like a typical job role -- there is rarely sufficient time for onboarding. Creating an onboarding checklist in Smartsheet helps smooth the transition to a new project. New team members can work through the checklist in their own time, speeding up their onboarding time and freeing up managers to focus on project delivery.

The screenshot shows a Smartsheet interface for an onboarding checklist for Sally Jones. The sheet is organized into sections: 'Your Charter', 'Admin', and 'Required Onboarding Meeting'. A context menu is open over the 'Your Charter' section, and a 'New Reminder' dialog box is displayed in the foreground. Callouts A-E highlight specific features: A (sheet name), B (checkbox), C (conditional formatting), D (reminder dialog), and E (context menu).

Reviewed or Complete	Pri	Item	Comment	Date	Notes
		Sally Jones	<i>Notes on where to start, how to...</i>		
<input checked="" type="checkbox"/>		<< check off items as you review or complete them.			
		Your Charter	Design and implement an in-customer.		
<input checked="" type="checkbox"/>		30 Day Goal	Have a plan in place	12/21/15	
<input type="checkbox"/>		60 Day Goal	Launch the module - test end-u	01/20/16	
<input type="checkbox"/>		90 Day Goal	Launch the final module	02/19/16	
		Admin			
		PC Laptop	Is your PC Laptop set up properly and functioning?		
<input checked="" type="checkbox"/>	!	Email Address & Workstation login	Confirm that everything works.		
<input type="checkbox"/>		Parking & Building Access	Refer to the program resources sheet if you have any questions		
		Required Onboarding Meeting			
<input type="checkbox"/>	!	Orientation	Attend orientation led by the PMO team.		
<input type="checkbox"/>	!	Security Training	This is an important session.		
		"A Workplace of Respect" Training	This is required training, offered on the 1st of every month		
		Required Training	Complete the three mandatory modules		
		Onboarding Introduction Meetings	Schedule meetings with the following people.		

Templates & Methodologies

Methodologies and templates are seldom found nicely bundled together, ready to use. Project teams don't want to spend time searching for or creating new project templates. Instead, they'll benefit greatly from using Smartsheet as a one-stop shop for approved methodologies and templates so they can concentrate on the actual project.

The screenshot displays a Smartsheet table titled "Template or Methodology". The table has columns for "Template or Methodology", "Type", "Description", "Owner", and "Modified". The data is organized into sections: "Approved Templates and Methodologies", "Planning", and "Design". Callouts A-F highlight specific features: A points to the section header, B to the expand/collapse icons, C to the "Hyperlink" dialog box, D to the "Owner" column, E to the "Modified" column, and F to the "Attach as New Version" option in the attachment dialog box.

	Template or Methodology	Type	Description	Owner	Modified
1	Approved Templates and Methodologies				
2	Planning				
3	Business Case	Sheet	Our business case template captures the reasoning for initiating a project or ta	Eric Walker	09/16/15 12:14 PM
4	Feasibility Report Template	Document	The feasibility report is a formal report that provides the findings of the feasibili	Eric Walker	09/16/15 12:14 PM
5	Project Plan	Sheet	Use this project plan as a starting point to guide you through both project execu	Shari Wise	09/16/15 12:14 PM
6	RACI	Sheet	Use this template to describe the responsibilities of various roles in project ti	Alex Bright	09/16/15 12:14 PM
7	Design				
8	User Requirements Specification (URS)	Document	The URS document describes the client's project requirements. The client or u	Jacob Senmai	09/16/15 12:14 PM
9	Technical Specification	Document	The technical specification is a detailed description of a technical requirements	Maria Salazar	09/16/15 12:14 PM
10	Functional Specification	Document	The functional specification is a technical document, usually prepared by the d	Frank Carlson	09/16/15 12:14 PM
11	Resource Allocation	Sheet	The resource allocation document can be used by a project manager to occur	Eric Walker	09/16/15 12:14 PM
12					
13					
14					
15					

- A Organize templates by phase so project teams can quickly find the most relevant ones.
- B Attach templates directly to the sheet – Smartsheet supports virtually any file type.
- C If your templates live in other sheets, you can link directly to them.
- D List owners so everyone knows where to direct questions.
- E Track changes with the “Modified” date column that automatically updates whenever a change is made.
- F Know you’re working with current documents by tracking document version controls.

A Filter any column or use hierarchy to group terms alphabetically for familiar navigation.

B Attach or link to supporting information, like images or websites to learn more.

C View the change history of any cell so you know who made which changes and when.

D Share the sheet so others can add terms as they come across them.

Program Glossary

Every organization has its own colloquialisms. To those who understand them, they speed up communication. For new team members, it can be like learning a foreign language. Use Smartsheet as a wiki-like solution to define and publish common terms. You can even crowdsource new terms by inviting project teams to add their phrases and definitions.

The screenshot displays a Smartsheet spreadsheet titled "Program Glossary" with columns for Term, Acronym, and Description. The spreadsheet lists various project management terms such as Agile Software Development, Aggregate planning, Allocation, Budgeted cost of work performed (BCWP), Budgeted cost of work scheduled (BCWS), Business Process Modeling (BPM), Capability Maturity Model (CMM), Critical path method (CPM), and Critical chain project management (CCPM). Annotations A, B, C, and D are overlaid on the spreadsheet to illustrate features: A points to the "Allocation" row; B points to an "Attachments" dialog box showing files like "Agile Software Development (Wikipedia)"; C points to a "View History: Description" dialog box for the "Allocation" term; and D points to the bottom navigation bar which includes options for Sharing, Alerts, Attachments, Discussions, Update Requests, and Web F...

Term	Acronym	Description
Program Glossary Source: Wikipedia Glossary of Project Management		
Agile Software Development		Agile software development is a set of fundamental principles about how software should be developed based on an agile way of working in contrast to previous heavy-handed software development methodologies.
Aggregate planning		Aggregate planning is an operational activity which does an aggregate plan for the production process, in advance of 2 to 18 months, to give an idea to management as to what quantity of materials and other resources are to be procured and when, so that the total cost of operations of the organization is kept to the minimum over that period.
Allocation		Allocation is the assignment of available resources in an economic way.
Budgeted cost of work performed	BCWP	Budgeted cost of work performed (BCWP) measures the budgeted cost of work that has actually been performed, rather than the cost of work scheduled.
Budgeted cost of work scheduled	BCWS	Budgeted cost of work scheduled (BCWS) the approved budget that has been allocated to complete a scheduled task (or Work Breakdown Structure (WBS) component) during a specific time period.
Business Process Modeling	BPM	Business Process Modeling (BPM) is the activity of representing processes of an enterprise, so that the current ("as is") process may be analyzed and improved in future ("to be").
Capability Maturity Model	CMM	Capability Maturity Model (CMM) in software engineering is a model of maturity model can be described as a structured collection of elements and aids in the definition and understanding of an organization's process.
Critical path method	CPM	Critical path method (CPM) is a mathematically based modeling technique for project management.
Critical chain project management	CCPM	Critical chain project management (CCPM) is a method of planning an...

Deliverables Archive

Treating project deliverables as important assets can be often overlooked. To adequately preserve your institutional memory, you need to maintain a record of your project outputs that can serve as reference material for the future. Smartsheet is a great place to catalog and archive your deliverables because it's secure, available from anywhere, and easily searchable.

The screenshot shows a Smartsheet interface with a table titled "Program Deliverables Archive". The table has columns for Project Name, Deliverable Name, Project Owner, Deliverable Type, Deliverable Completion Date, Client Approved, Client Approver, and Notes. A filter is applied to the Project Name column, showing a list of projects including Project Alpha, Project Charlie, Project Echo, Project Foxtrot, Project Hotel, Project Sierra, and Project Tango. A "Project Deliverable Submission Form" is overlaid on the right side of the table, with fields for Project Name, Deliverable Name, File Attachments, Project Owner, Deliverable Type, Deliverable Completion Date, Client Approved, and Client Approver. The form is titled "Project Deliverable Submission Form" and includes instructions: "Please use this form to submit completed project deliverables." and "Skip this question if your deliverable is a sheet. You can add the sheet name and URL to the notes section at the bottom of the form."

	Project Name	Deliverable Name	Project Owner	Deliverable Type	Deliverable Completion Date	Client Approved	Client Approver	Notes
1		Program Deliverables Archive						
2		Explanation: The deliverables below represent all milestone and final deliverables for the program.	Person responsible for the deliverable			Client has signed off on the deliverable?	Name of client who accepts the deliverable	
3	Project Alpha	Project Plan for Alpha	Eric Walker	Sheet	10/05/15	Approved	Sarah Schrek	The official project
4	Project Charlie	Market Size Analysis	Corrine Jones	Document	11/04/15	Approved		
5	Project Alpha	Technical Specifications	Eric Walker	Document	11/02/15	Approved		
6	Project Foxtrot	Opportunity Assessment Report	Tanner Kendrick	Document	11/04/15	Approved		
7	Project Alpha	Functional Specification	Eric Walker	Document	11/19/15	Approved		
8	Project Echo	Project Plan for Echo	Shari Wise	Sheet	11/04/15	Approved		
		Analysis Report	Karen Zeman	Sheet	11/04/15	Approved		
		Analysis Report	Shari Wise	Document	10/13/15	Approved		
		Analysis Report	Julia Scold	Sheet	11/06/15	Approved		
		Analysis Report	Karen Zeman	Document	11/04/15	Approved		
		Analysis Report	Julia Scold	Document	11/30/15	Approved		
		Analysis Report	Shari Wise	Document	12/03/15	Submitted		
		Analysis Report	Eric Walker	Sheet	12/16/15	Approved		
		Analysis Report	Tanner Kendrick	Document	01/05/16	Approved		

A Upload deliverables directly to the sheet to maintain a secure record.

B Filter any column, like Project Name, to hone in on all of the deliverables for a specific project.

C List the project owners alongside the deliverables so you can track accountability.

D Use a web form to streamline the submission of completed deliverables by project teams.

A Use hierarchy to group information for enhanced navigation.

B Easily share the sheet with other team members so they can help add relevant information.

C Link directly to supporting resources, like other sheets, documents or URLs.

D Create a template from the Role Transition sheet so it's easy to create a new one for every new person.

Role Transition

Few things are more frustrating than starting a new role and lacking the guidance, resources or dedicated time with your new team. Oftentimes, the best person to learn from is actually the person who previously held the role. Smartsheet's Role Transition template gives people a place to impart critical knowledge, like key resources, important contacts, task specific instructions, important meetings and general tips and advice.

The screenshot displays the Smartsheet 'Role Transition' template interface. It features a grid with columns labeled 'Field 1' through 'Field 5'. The grid contains sections for 'Role Information', 'Key Resources', 'Program Information', 'Project Information', 'Systems of Record', and 'Templates & Tools'. Each section includes detailed text and hyperlinks to other sheets and documents. Four callout boxes are overlaid on the interface:

- Callout A:** Points to the 'Role Information' section, which includes fields for 'Transferring To' (Sally Jones), 'Role / Title' (Business Analyst), 'Date of Transition' (November 17, 2015), 'Transferring From' (Alex Bright), 'For Project' (Project Alpha), and 'Manager' (Janine Keys).
- Callout B:** Points to the 'Share Workspace' dialog box, which shows the user 'Janine Keys' and options for permissions (Viewer, Editor, Admin) and a message to be sent.
- Callout C:** Points to the 'Hyperlink' dialog box, which offers options to 'Link to URL' or 'Link to other Smartsheet' (e.g., Program Master Calendar) and a 'Display Text' field.
- Callout D:** Points to the 'Save as Template' dialog box, which allows saving the current sheet as a 'Role Transition Template' with a description and options to keep data and formatting, attachments, discussions, and active forms.

Project Closeout Form

Project closeout activities rarely receive the attention they deserve. The closeout process requires that deliverables are archived, contracts are closed and learnings are documented. Smartsheet's customizable web forms streamline the process by giving project teams an easy-to use form that walks them through the information they need to provide. That information is then fed directly into a sheet, where program managers can analyze a complete list of completed projects.

The screenshot displays a Smartsheet interface. At the top, a table lists project information with columns for Project Name, Description, Owner, Sponsor, Client, Baseline Start Date, Planned End Date, Actual End Date, Schedule Variance, Baseline Budget, Actual Budget, and Budget Variance. Below this, a 'Project Closeout Form' is shown, which is a web form with sections for Project Information, Schedule, and Feedback. The form includes fields for Project Name, Description, Owner, Sponsor, Client, Baseline Start Date, and Planned End Date. A 'Submit' button is at the bottom of the form. To the right of the form, a 'Checklist' table is visible, with columns for Client Accepted?, No Open Issues?, AAR Complete?, Contracts Closed?, Deliverables Archived?, Knowledge Transferred?, and Feedback for the PMO?. The checklist contains several rows of data, all with checkmarks in the first six columns. The feedback column contains text: 'We hear that Smartsheet' and 'The accessibility of the k'. The form and checklist are overlaid on a background of the Smartsheet data table.

Project Name	Description	Owner	Sponsor	Client	Baseline Start Date	Planned End Date	Actual End Date	Schedule Variance	Baseline Budget	Actual Budget	Budget Variance
Project Alpha	This project deliver	Alex Bright	Karen Zep	SPS Corporation	11/17/15	12/17/15	12/14/15	-3	\$12,350.00	\$10,800.00	-\$1,550.00
Project Beta	This project deliver	Kerrigan	Sally Jon	Boynx Systems	10/01/15	11/16/15	11/16/15	0	\$18,000.00	\$18,500.00	\$500.00
Project Gamma	This project deliver	Janine Key	Smith	Garamond II	11/10/15	12/23/15	12/22/15	-1	\$9,000.00	\$9,000.00	\$0.00

- A** Use the form to capture key information, including budget and schedule performance.
- B** Automatically collate web form submissions in one sheet.
- C** Filter by project managers so you can see how they perform over multiple projects.
- D** Verify that project managers have completed all of the necessary tasks with a simple checklist.

- A Attach or link to supporting documents, like budget or schedule analysis.
- B Use symbols, like flags, to call attention to the most important takeaways.
- C Use discussions to capture and preserve notes from the AAR meeting.

**Best Practice:* Conduct the AAR as soon as possible after the project ends so learnings are still top of mind.

Project After Action Review

An After Action Review (AAR) is a simple process to capture the lessons learned from a project with the goal of improving future performance. It is an opportunity for a team to reflect on a project, activity, event or task so that they can do better next time. Using Smartsheet to document your learnings not only helps structure the AAR, but it also helps you preserve the information in a shareable way so others can benefit from the findings.

The screenshot displays the Smartsheet interface for an After Action Review (AAR) for Project Alpha. The main table is organized into sections:

- AAR Participants:** A table with columns for Name and Role. Participants listed include Alex Bright (Business Analyst), Sally Jones (Business Analyst), Jacob Senmark (BPM Specialist), Janine Keys (Manager), Ralph Finley (Specialist), and Ryan Baxter (Senior Manager).
- Project Information:** Fields for Project Name (Project Alpha), Project Start and End (10/01/2015 - 11/17/2015), Project Lead (Janine Keys), and Project Charter (Project Alpha Charter).
- Executive Summary:** Includes sections for Key Learnings and Recommendations.
- Objectives & Outcomes:** A table with columns for objectives and their outcomes.

Overlaid on the interface are three key features:

- A:** An 'Attachments' dialog box showing options to upload files from local storage or link to documents from Google Drive, Box, Dropbox, Evernote, or a URL.
- B:** A red flag icon in the 'Objectives & Outcomes' section, highlighting a specific objective.
- C:** A 'New Discussion' dialog box containing text input for 'Key Learnings - Notes from the AAR', with a 'Save' button at the bottom.

Jump-Start Your Knowledge Management with Smartsheet



Read through the solution guide

You've had an overview of the solution – now try Smartsheet for yourself.



Sign up or log in to Smartsheet

Sign up at smartsheet.com/pm-solutions/knowledge-management
You can also use this with your existing account by logging in.



Open the Getting Started Sheet

Once you're in Smartsheet, click on the "Getting Started" sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.



Customize the sheet

The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.



Start working and sharing

To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.

Other Recommended Steps



Delete sheets you don't need

Deleting a sheet is easy! You can learn how to [here](#).



Build your own sheet

We know you have unique needs – that's why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.



Use the “cheat sheets” in this guide

To help you get the most out of Smartsheet, we've included cheat sheets for formulas and shortcuts at the end of this guide.

Have questions or want to learn more about Smartsheet?

Smartsheet Help Center - help.smartsheet.com

Everything you need to help you get the most out of Smartsheet.

Smartsheet Community - community.smartsheet.com

Ask questions, share best practices, and get help.

Submit your question - solutions@smartsheet.com

Want personalized help? Our design and services teams have you covered!

Send us your feedback - help.smartsheet.com/customer/portal/emails/new

Share your thoughts or suggestions about Smartsheet or our Solutions.











Plans and Pricing - smartsheet.com/pricing

Enjoy your 30-day free trial.

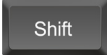

Smartsheet Cheat Sheet

Keyboard Shortcuts


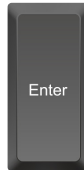

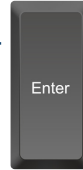
Basics

-  /  +  Enters **edit mode** on selected cell
-  +  **Saves all** unsaved information
-  +  **Undo** the previous action since last save
-  +  **Redo** the previous action since last save
-  **Inserts** a row above the selected row.



To insert multiple rows at once, press  and select multiple row headers, then click .

Formatting

 +  (or)  +  Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.

 +  **Indents** Primary Column only

 +  **Outdents** Primary Column only





 +  **Italic**  +  **Fill down**
(also available by dragging cell corner)

 +  **Bold**

 +  **Underline**

NOTE: Mac users should use  instead of  unless otherwise noted.














Formulas

-  +  x1 Inserts \$ before column name (horizontal cell reference lock).
- x2  Inserts \$ after column name (vertical cell reference lock).
- x3  Inserts \$'s around column name (full cell reference lock).

Date Column Cells

- t:** Inserts today's date.
- +**: Enters date x days from today.
- :** Enters date x days before today.
- mon / tue / wed /** etc... Inserts date of the current week's Monday, Tuesday, Wednesday, etc.
- yes:** Inserts yesterday's date.
- tom:** Inserts tomorrow's date.
- next week:** Inserts date seven days from today.
- last week:** Inserts date from seven days ago.
- Dec 15 / Jan 3 /** etc: Inserts date of string entered.

Additional

-  +  Displays the **Open a Sheet** form.
-  +  Displays the **Go To Row** form. Type in the row number you'd like to scroll to then click OK.
-  Takes you to the first cell of the row you are currently on.
-  +  Takes you to the top left cell of your sheet.
-  Takes you to the last cell of the row are are currently on.
-  +  Takes you to the bottom right cell of your sheet.
-  Moves you up in your sheet.
-  Moves you down in your sheet.
-  Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our [Column Types](#) article.

Smartsheet Cheat Sheet

Formulas

Numeric Formulas

SUM(): Adds selected values, or a range of cells.

Example: =SUM(Cost1: Cost5)

Result: 1125.75

AVG(): Averages selected values, or a range of cells.

Example: =AVG(Cost1: Cost5)

Result: 225.15

MAX(): Returns the highest numeric value, or latest date.

Example: =MAX(Cost1: Cost5)

Result: 425.75

MIN(): Returns the lowest numeric value, or earliest date.

Example: =MIN(Cost1: Cost5)

Result: 100

INT(): Returns the integer portion of a given number.

Example: =INT(Cost5)

Result: 425

ROUND(): Rounds a given number to the desired # of digits.

Syntax: ROUND(cell1, #_of_digits)

Example: =ROUND(Cost5, 1)

Result: 425.8

ABS(): Returns the absolute value of a given number.

Example: =ABS(-85)

Result: 85

COUNT(): Counts non-blank cells in a given range.

Example: =COUNT([Task Name];[Task Name])

Result: 5

LEN(): Returns the number of characters (length) in a given cell.

Example: =LEN([Task Name]5)

Result: 6
NOTE: Formatting/currency values aren't included.
Dates have a length of 5.

Logic Formulas

IF(): Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

Syntax: IF(logical_test, value_if_true, value_if_false)

Example: =IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger")

Result: Date 2 is Larger

ISBLANK(): Used within an IF formula to test if a cell is blank.

Example: =IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn't blank")

Result: Cell isn't blank

ISTEXT(): used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

Example: =IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn't text")

Result: Cell isn't text

ISNUMBER(): Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

Example: =IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn't a number")

Result: Cell isn't a number

ISDATE(): Used in an IF formula to test if a cell contains a date.

Example: =IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn't a date")

Result: Cell is a date

ISBOOLEAN(): Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

Example: =IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn't a boolean")

Result: Cell is a Boolean

Smartsheet Cheat Sheet

Formulas

Logic Formulas (cont.)

AND(): Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

Syntax: AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)

Example: =IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")

Result: Tasks Incomplete

NOT(): Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

Syntax: NOT(Done1)

Example: =IF(NOT(Done1), "Task A Not Complete", "Task A Complete")

Result: Task A Complete

OR(): Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

Syntax: OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)

Example: =IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")

Result: Due Date 1 is the smallest

NESTED IF(): Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

Syntax: IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))

Example: =IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))

Result: This is Task A

Additional Formulas and Help

[Formula Basics](https://smartsheet.com/formula-basics) - smartsheet.com/formula-basics

How to create a formula and reference cells, columns, and ranges in your sheet

[Text Formulas](https://smartsheet.com/text-formulas) - smartsheet.com/text-formulas

Find, Replace, capitalizing text, etc

[Date Formulas](https://smartsheet.com/formula-basics) - smartsheet.com/formula-basics

TODAY() formula, calculating working days, creating dates, etc

[Advanced Formulas](https://smartsheet.com/date-formulas) - smartsheet.com/date-formulas

Weighted average, prorata, countif, countif s, sumif, sumif s

[Using Hierarchy in Formulas](https://smartsheet.com/using-hierarchy-in-formulas) - smartsheet.com/using-hierarchy-in-formulas

How to reference child rows

[Formula Error Messages](https://smartsheet.com/formula-error-messages) - smartsheet.com/formula-error-messages

What they mean, and how to troubleshoot



smartsheet

Knowledge Management Solution Guide

PROJECT .02

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