Solution Guide
PROJECT .02

Knowledge Management

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

smartsheet

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.

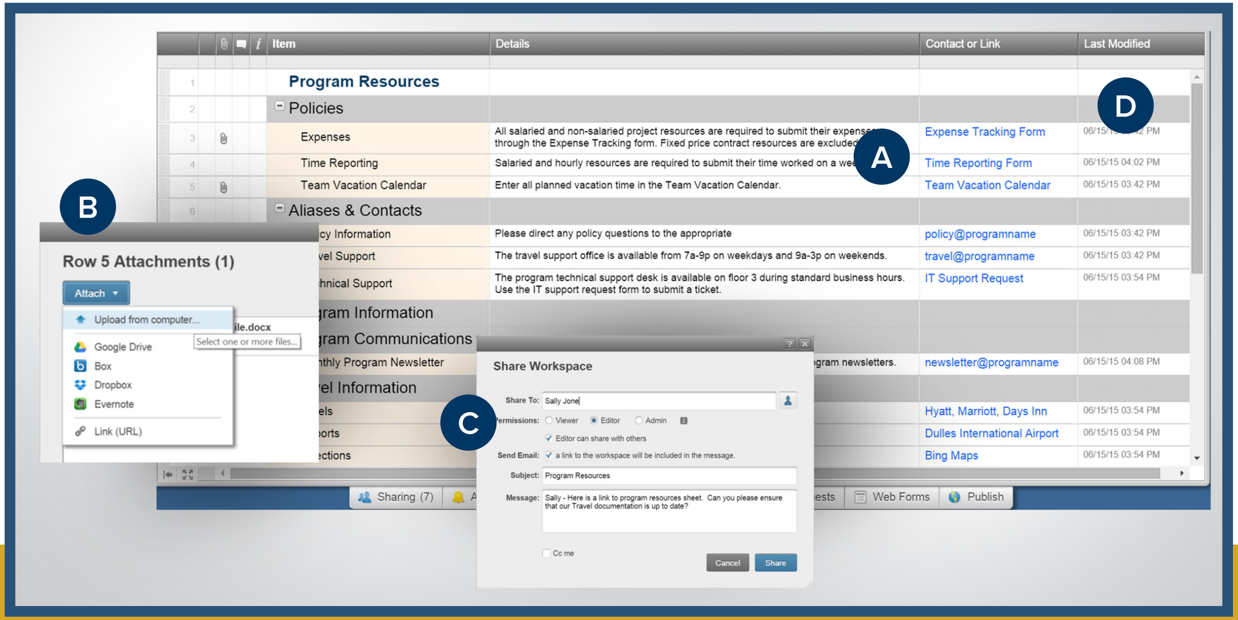
3 TRANSFER

- 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.



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.

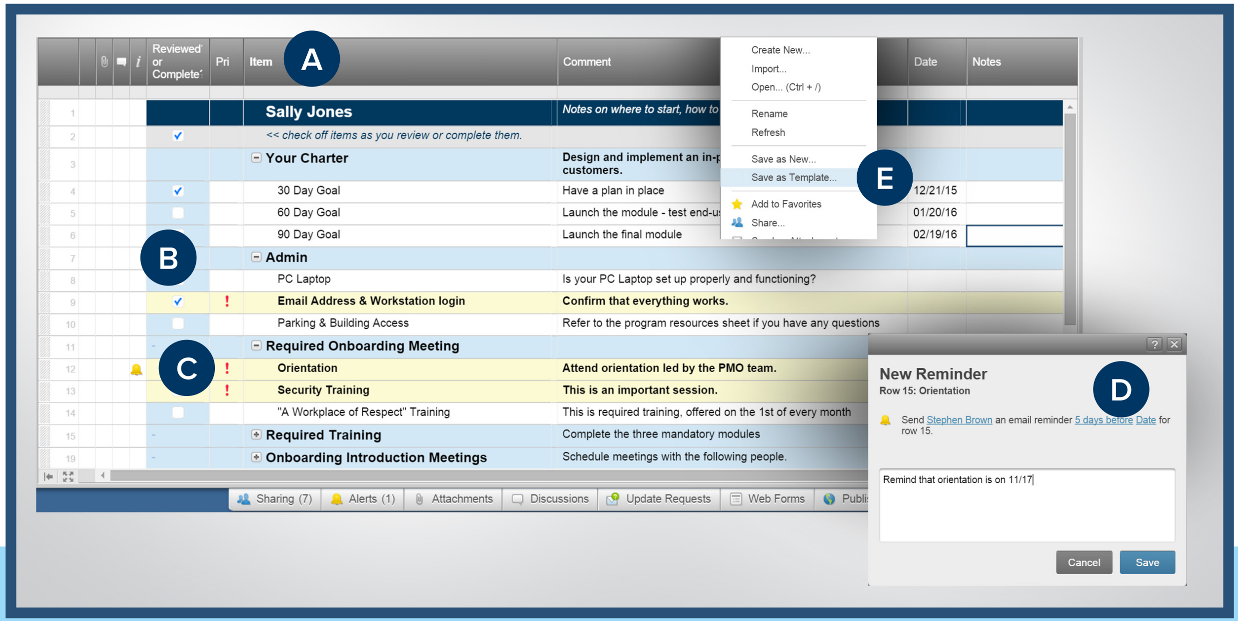
C Emphasize the most important items, using conditional formatting to highlight the row.

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

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

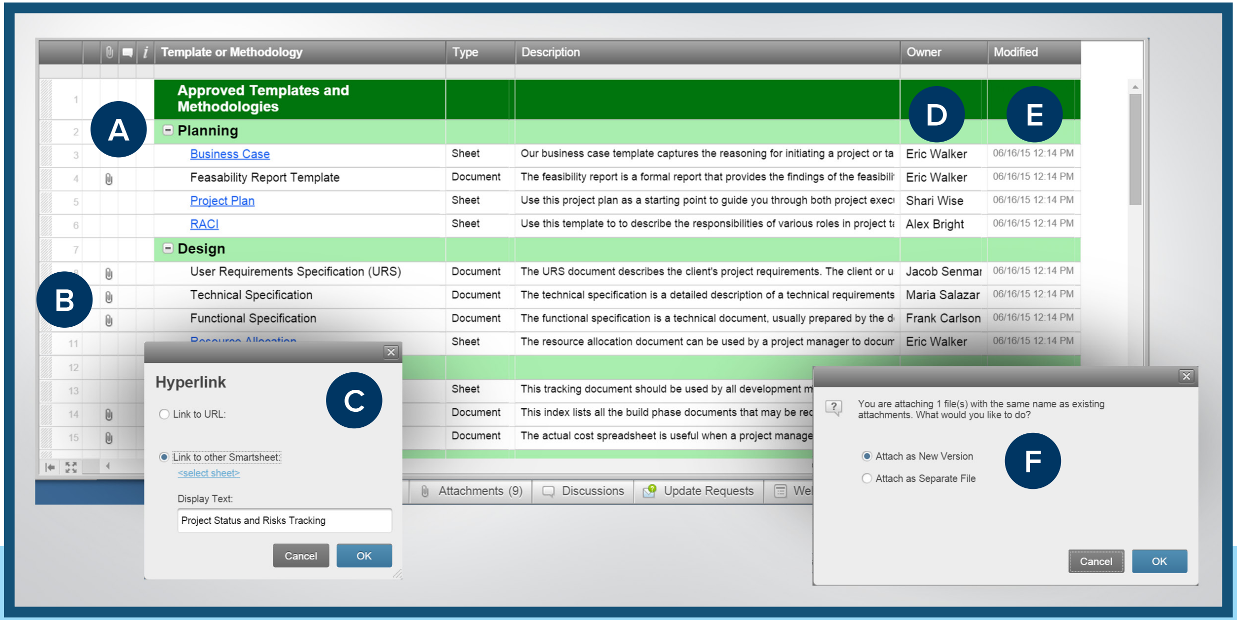
Onboarding Checklist

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.



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.



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.

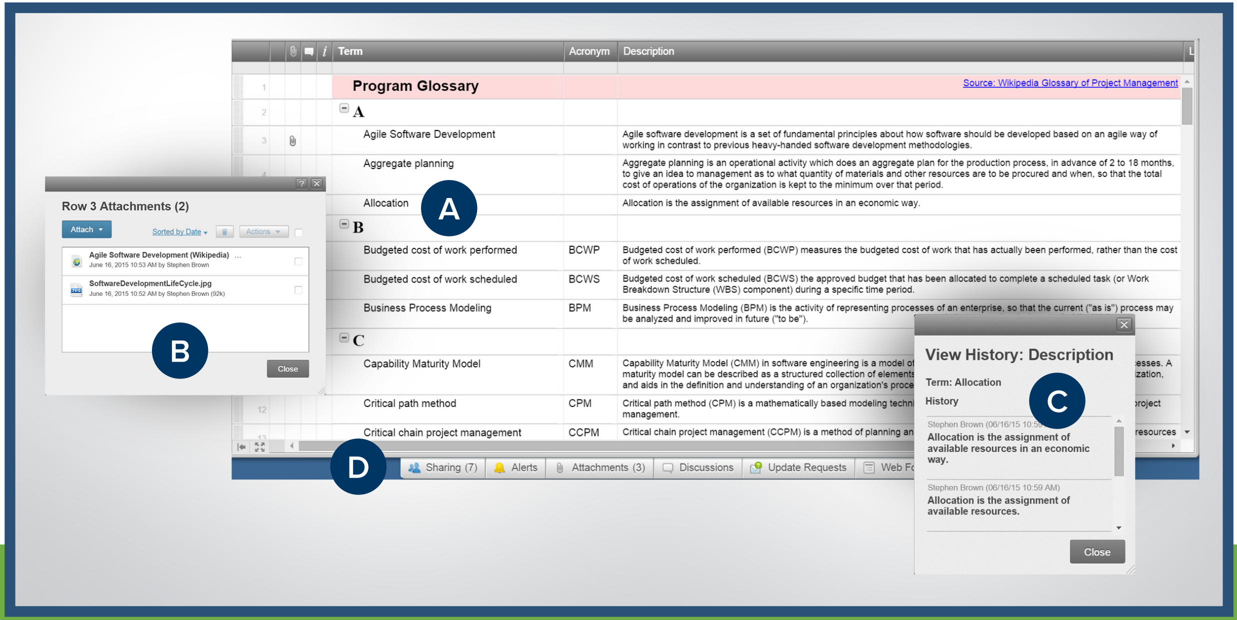
B Attach or link to supporting information, like images or websites to learn more.

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.

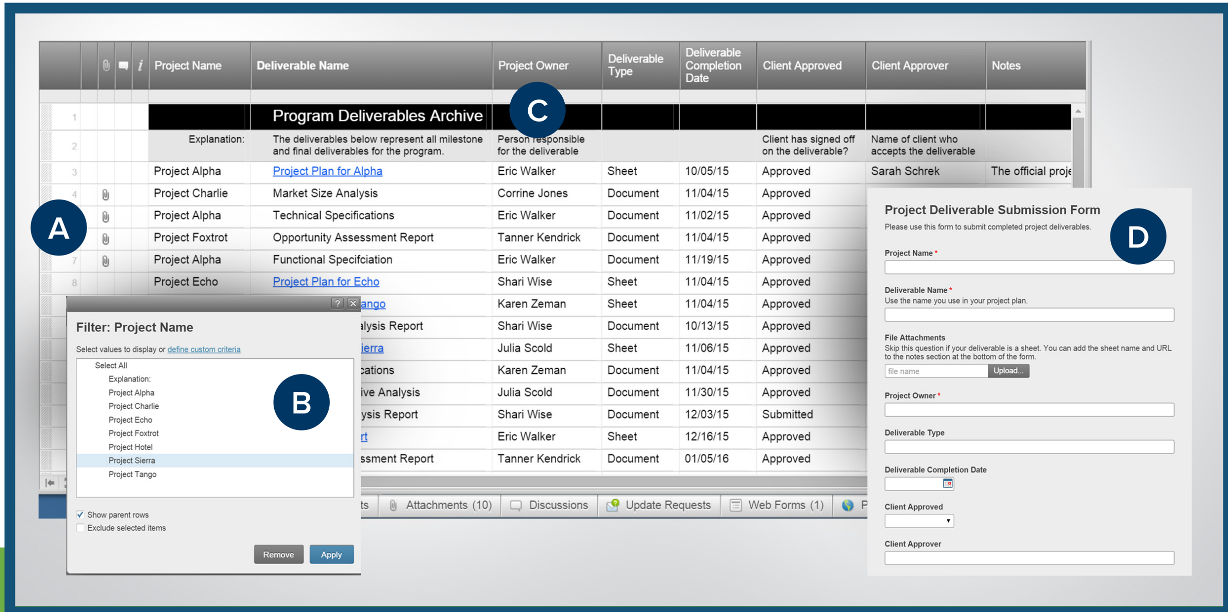
Program Glossary

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.



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.



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.

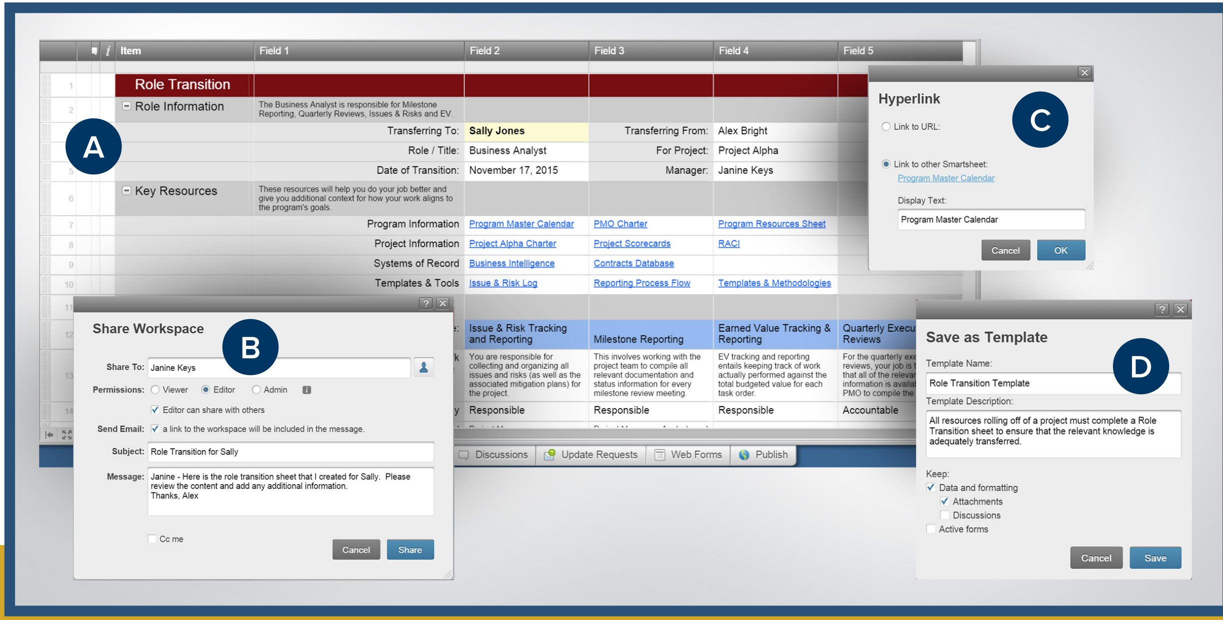
B — Easily share the sheet with other team members so they can help add relevant information.

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.

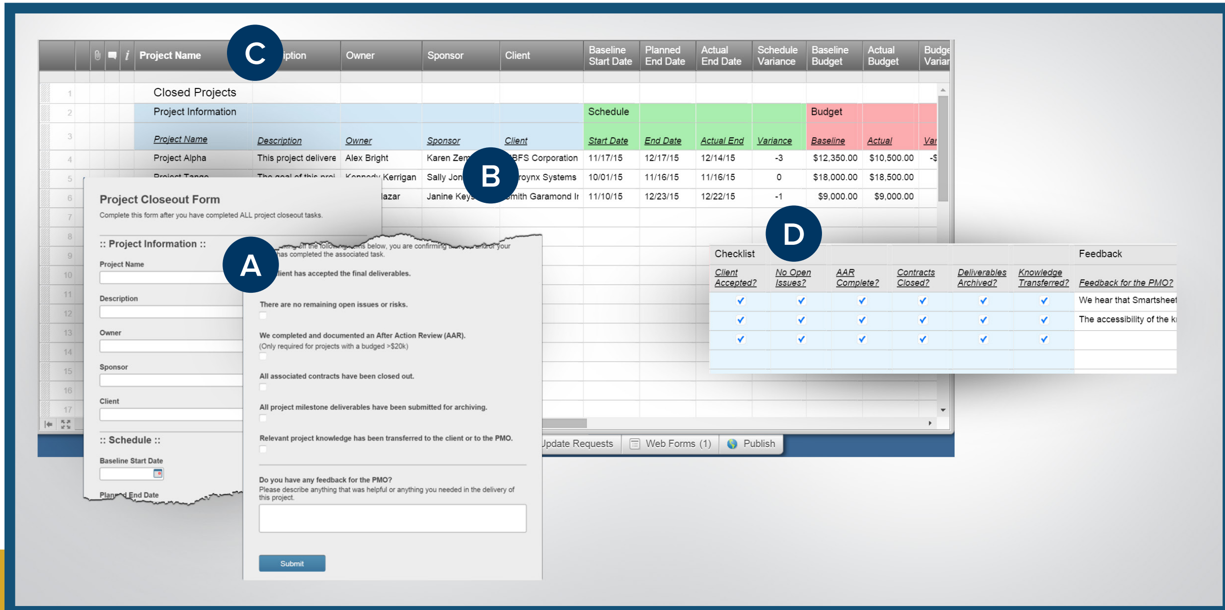
Role Transition

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.



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.



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.

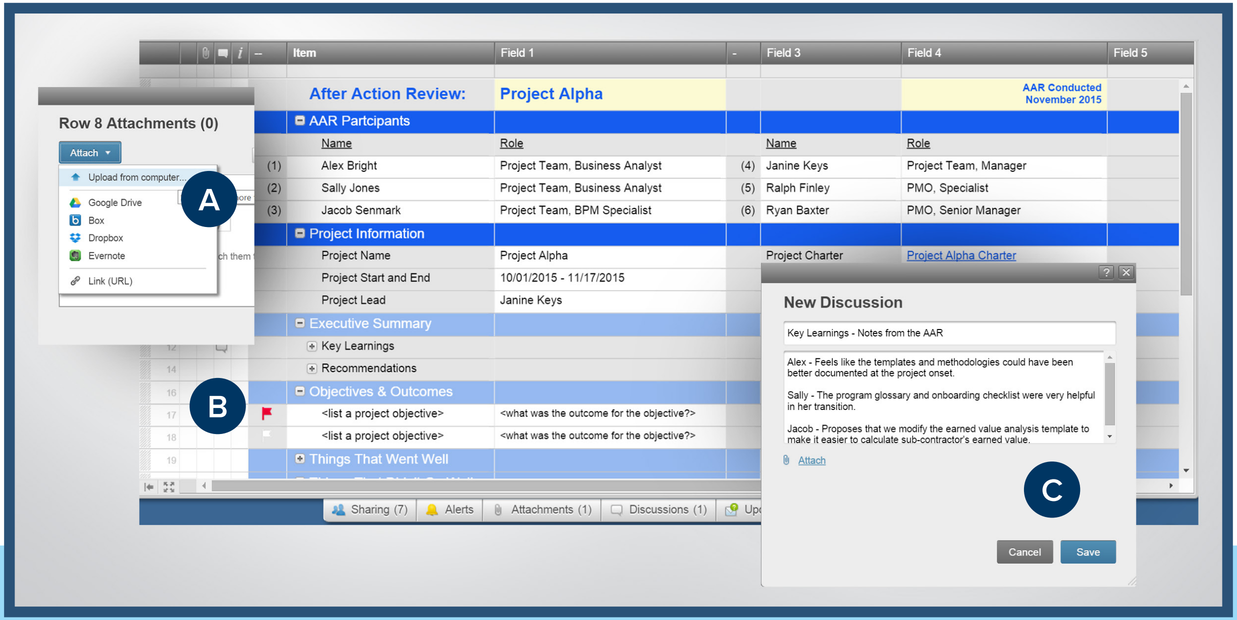
B Use symbols, like flags, to call attention to the most important takeaways.

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.



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

F2 / Fn + F2 — Enters **edit mode** on selected cell

Ctrl + S — **Saves all** unsaved information

Ctrl + Z — **Undo** the previous action since last save

Ctrl + Y — **Redo** the previous action since last save

Ins — **Inserts** a row above the selected row.

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

Formatting

Ctrl + Enter (or) Alt + Enter — 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.

Ctrl + K — **Indents** Primary Column only

Ctrl + M — **Outdents** Primary Column only

Ctrl + I — **Italic**

Ctrl + B — **Bold**

Ctrl + U — **Underline**

Ctrl + D — Fill down *(also available by dragging cell corner)*

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

Formulas

Ctrl + L x 1 Inserts **$** before column name (horizontal cell reference lock).

x 2 Inserts **$** after column name (vertical cell reference lock).

x 3 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

Ctrl + / Displays the **Open a Sheet** form.

Ctrl + G Displays the **Go To Row** form. Type in the row number you'd like to scroll to then click OK.

Home Takes you to the first cell of the row you are currently on.

Ctrl + Home Takes you to the top left cell of your sheet.

End Takes you to the last cell of the row are are currently on.

Ctrl + End Takes you to the bottom right cell of your sheet.

Pg Up Moves you up in your sheet.

Pg Dn Moves you down in your sheet.

Space 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.

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: 6NOTE: 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

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 - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

Text Formulas - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

Date Formulas - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

Advanced Formulas - smartsheet.com/date-formulas
Weighted average, prorate, countif, countif s, sumif, sumif s

Using Hierarchy in Formulas - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

Formula Error Messages - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot

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