

*rego*University 2017

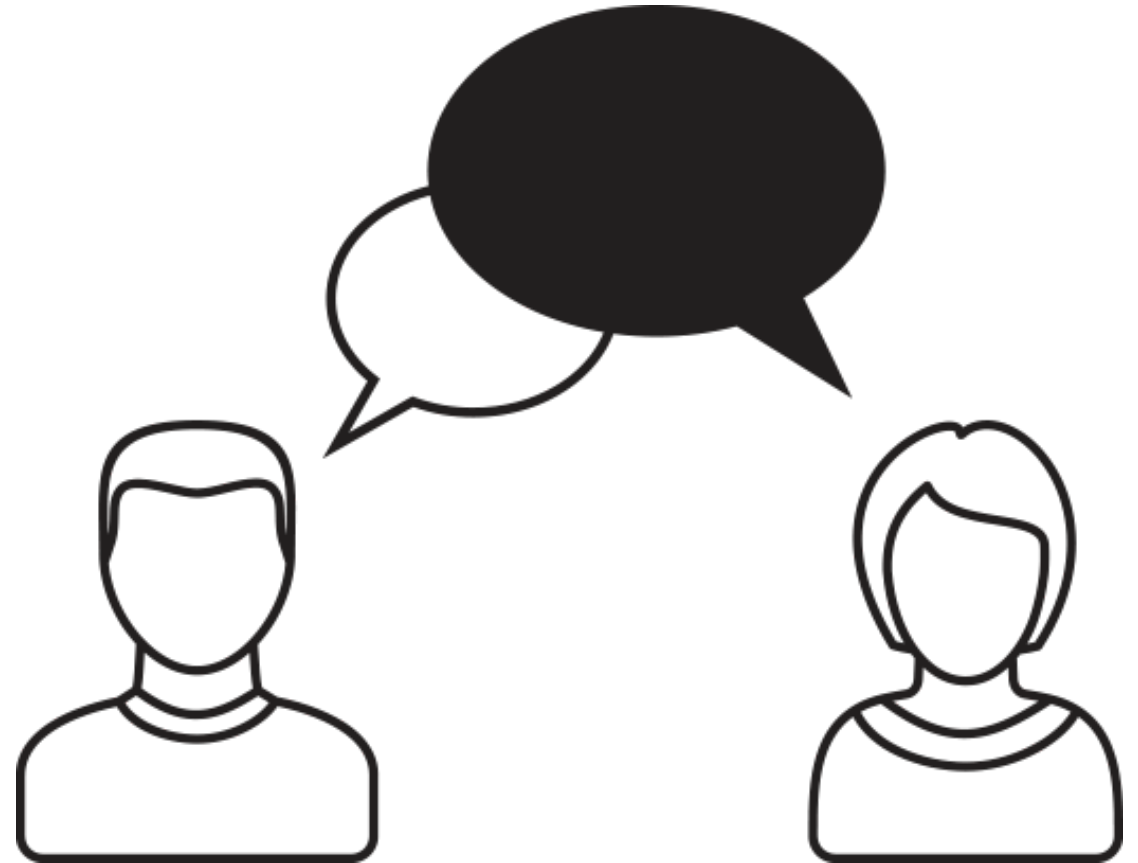
Smartsheet with CA PPM | Tips and Tricks

Your Guides: Grant Zemont and Doug Greer



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Project Scheduling Tools?
- Introduction to Smartsheet
- Setting Up and Managing a Project
- Collaborating with the Project Team
- Managing Resources
- Reporting
- Integrating with CA PPM

Project Scheduling Tools

Project Managers are very passionate about their project scheduling tools

1. How many have heard of Smartsheet? How many already use it?
2. What project scheduling tool(s) does your company use?
3. Level of integration with CA PPM?
 1. Fully integrated?
 2. Phase-level within CA PPM, detail offline?
 3. All offline?



What is SmartSheet?

Smartsheet is the world's leading SaaS platform for managing and automating collaborative work. Over 90,000 companies, and millions of information workers, trust Smartsheet to help them accelerate business execution and address the volume and velocity of today's collaborative work.



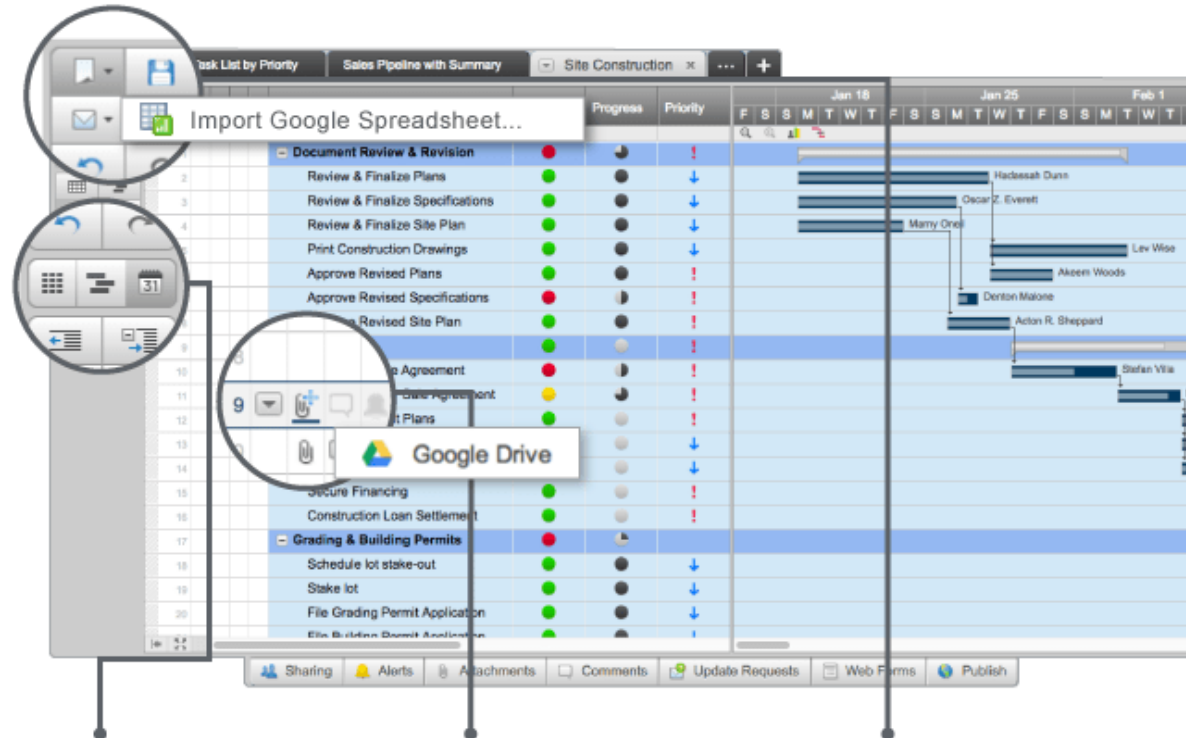
www.smartsheet.com

G Suite

 Office 365

G Suite Integration

6



Overlay Calendar

Automatically sync project dates to Google calendar

Attach Docs

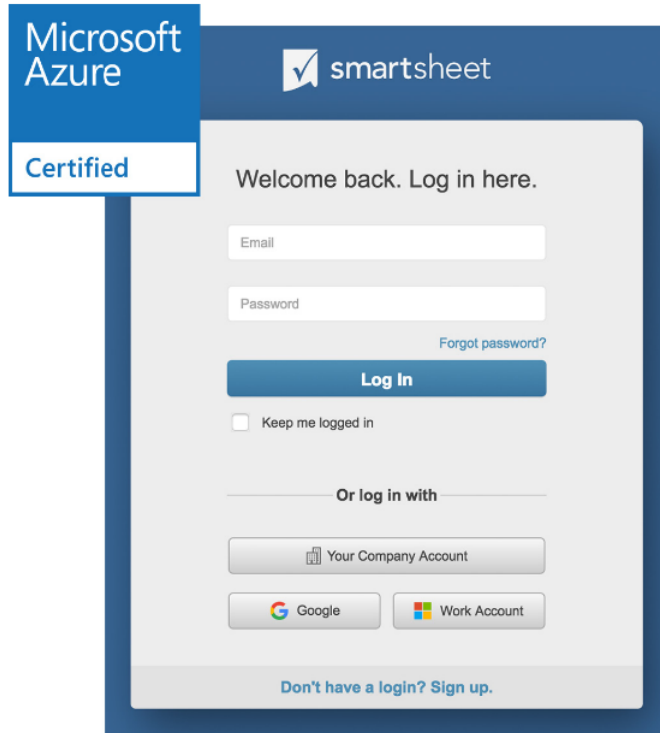
Attach Google Docs to any row and share them with your team

Gmail Integration

Embed Smartsheet project workflow directly in Gmail

Office 365 Integration

7



Other Integrations

8



iOS 10



MEISTERPLAN



<https://www.smartsheet.com/apps>

Key Features

1. Easy Project Scheduling
 - Waterfall
 - Agile
 - Kanban
2. Collaboration
 - Sharing
 - Alerts and Notifications
 - Distributed Access
3. Resource Management
4. Reporting
5. Flexible Non-Project Management Uses

- Create a Sheet
- Create Tasks and Dependencies
- Assign Resources
- Views

Setting Up and Managing A Project

SmartSheet Layout

The screenshot displays the SmartSheet interface for a project named 'RegoU Demo Project'. The interface is divided into several sections:

- Home Menu:** Located on the left side, it contains icons for Home, Views, Indent, Format, and Numbers.
- Toolbar:** Located below the Home Menu, it contains icons for various formatting and editing tools.
- Sheet:** The main task list view, showing a table of tasks with columns for Task Name, Status, Start Date, End Date, Assigned To, Duration, % Complete, and Predecessors.
- Collaboration Tabs:** Located at the bottom of the interface, they include Sharing, Alerts, Attachments (1), Comments (1), Update Requests, Web Forms, and Publish.
- Gantt View:** A Gantt chart view on the right side, showing the project schedule with bars representing task durations and dependencies.

Red arrows point from the labels below to the corresponding elements in the screenshot:

- Home Menu (points to the Home icon in the Home Menu)
- Toolbar (points to the toolbar icons)
- Sheet (points to the task list table)
- Collaboration Tabs (points to the Update Requests tab)
- Gantt View (points to the Gantt chart)

Home
Menu

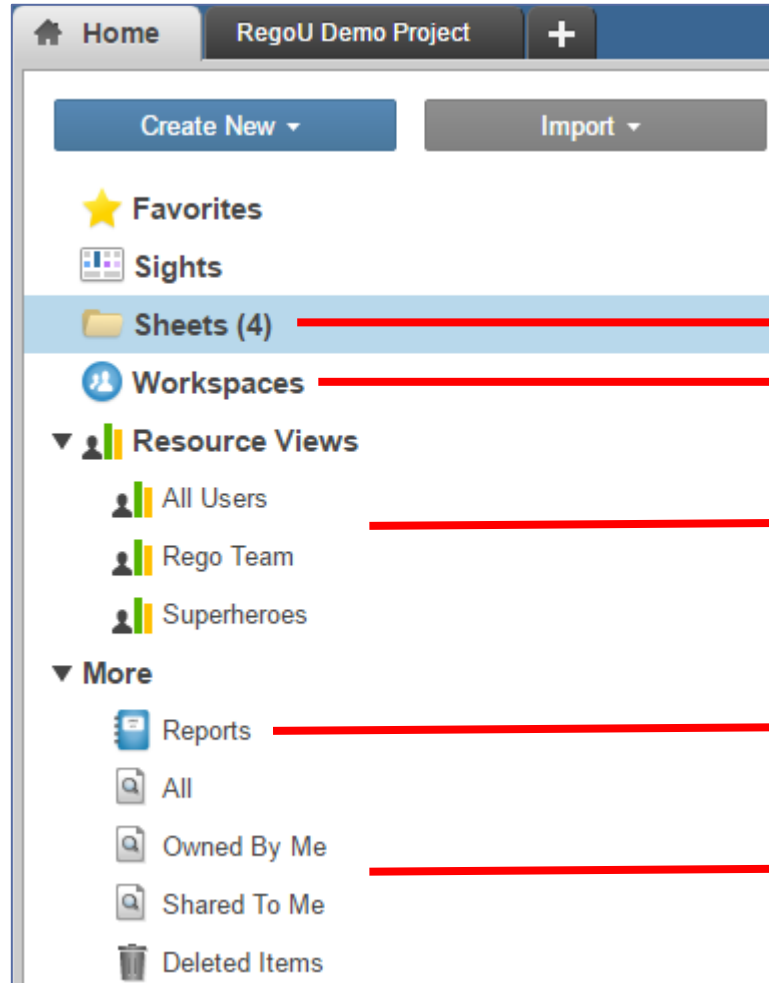
Toolbar

Sheet

Collaboration Tabs

Gantt View

Smartsheet Layout: Home (1)



Your Sheets

Logical Groups of Sheets for Collaboration/ Security

Resource Management Views

Create Reports for Your Sheets

Other Sheet Views

Smartsheet Layout: Home (2)

The screenshot displays the Smartsheet Home interface for the 'RegoU Demo Project'. A red box highlights the '+' button in the top navigation bar, with a red arrow pointing to the 'Create New Sheet' dialog. The 'Create New' dropdown menu is open, showing options like 'Blank Sheet', 'Task List', 'Project Sheet', 'Kanban Sheet', 'Browse Templates', 'Report', 'Sight', 'Folder', and 'Workspace'. The 'Import' dropdown menu is also open, showing options like 'Import Excel File...', 'Import MS Project File...', 'Import Google Spreadsheet...', and 'Import from Trello...'. The 'Create New Sheet' dialog is open, showing a search bar and a list of template categories. A red arrow points from the text 'Full Template List (more than just PM!)' to the list of templates in the dialog.

Quick Create

Full Template List (more than just PM!)

Home RegoU Demo Project +

Create New

- Blank Sheet
- Task List
- Project Sheet
- Kanban Sheet
- Browse Templates
- Report
- Sight
- Folder
- Workspace
- More
- Reports
- All
- Owned By Me
- Shared To Me
- Deleted Items

Import

- Import Excel File...
- Import MS Project File...
- Import Google Spreadsheet...
- Import from Trello...

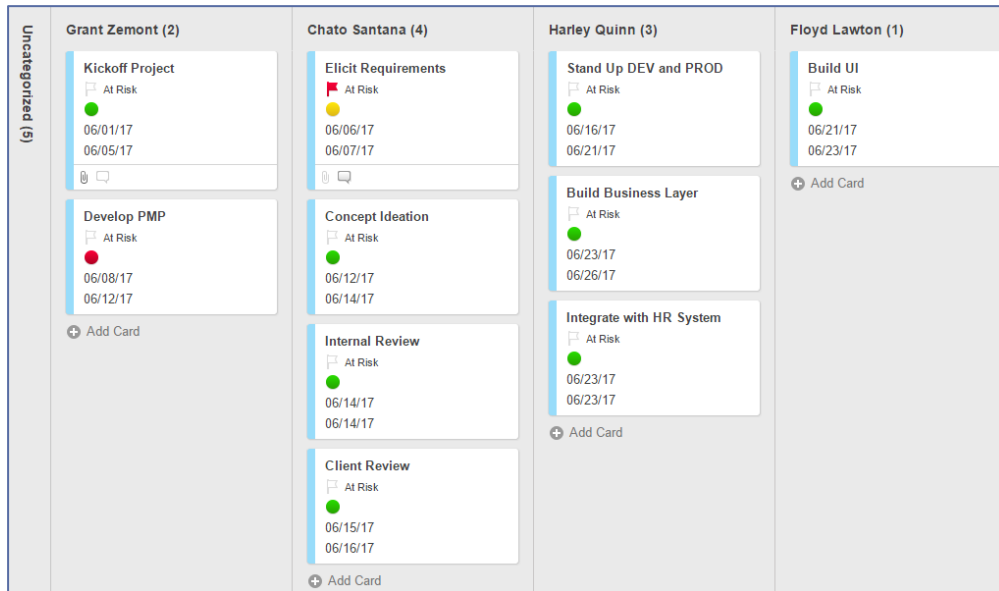
Create New Sheet Import

Search templates...

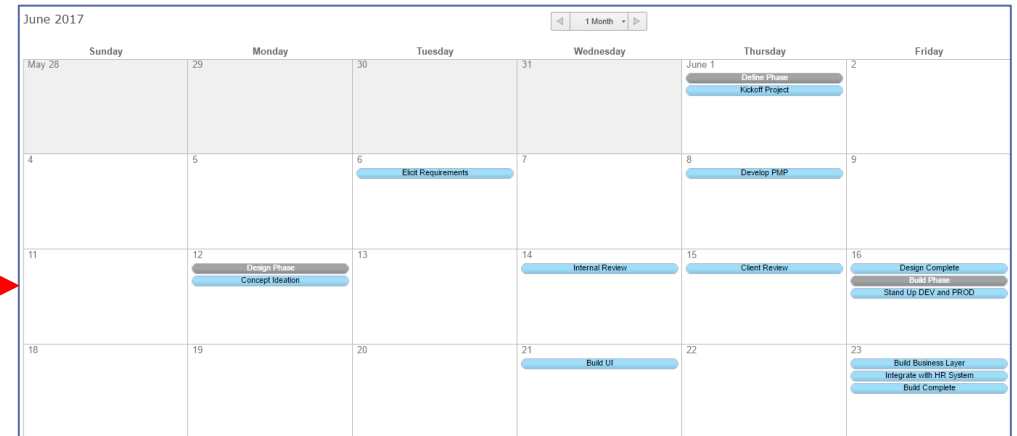
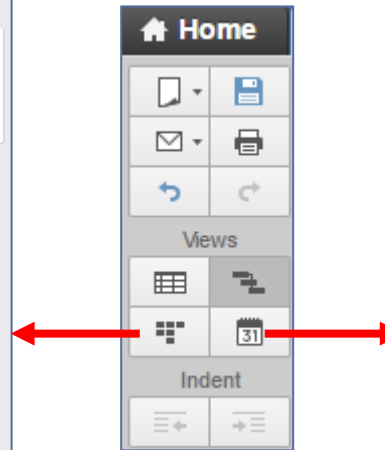
Template Category: All

- Basic Project with Gantt & Dependencies
- Team Task List by Priority
- Personal To Do List
- Client Contact List
- Getting Things Done (GTD) Action Tracker
- Non-Project Tasks for Resource Management
- Sales in Process, with Gantt & Dependencies
- To Do List & Progress Monitor
- Simple Bug & Issue Tracker Form
- Simple Sales Pipeline
- Sales Pipeline by Probability
- Web Project Timeline with Gantt & Dependenc
- Expense Report
- Time Tracker for Client Projects with Form
- Asset Manager with Depreciation
- Meeting Follow Up
- Simple Project Task List

Smartsheet Layout: Views



Card View
(can edit swim lanes)

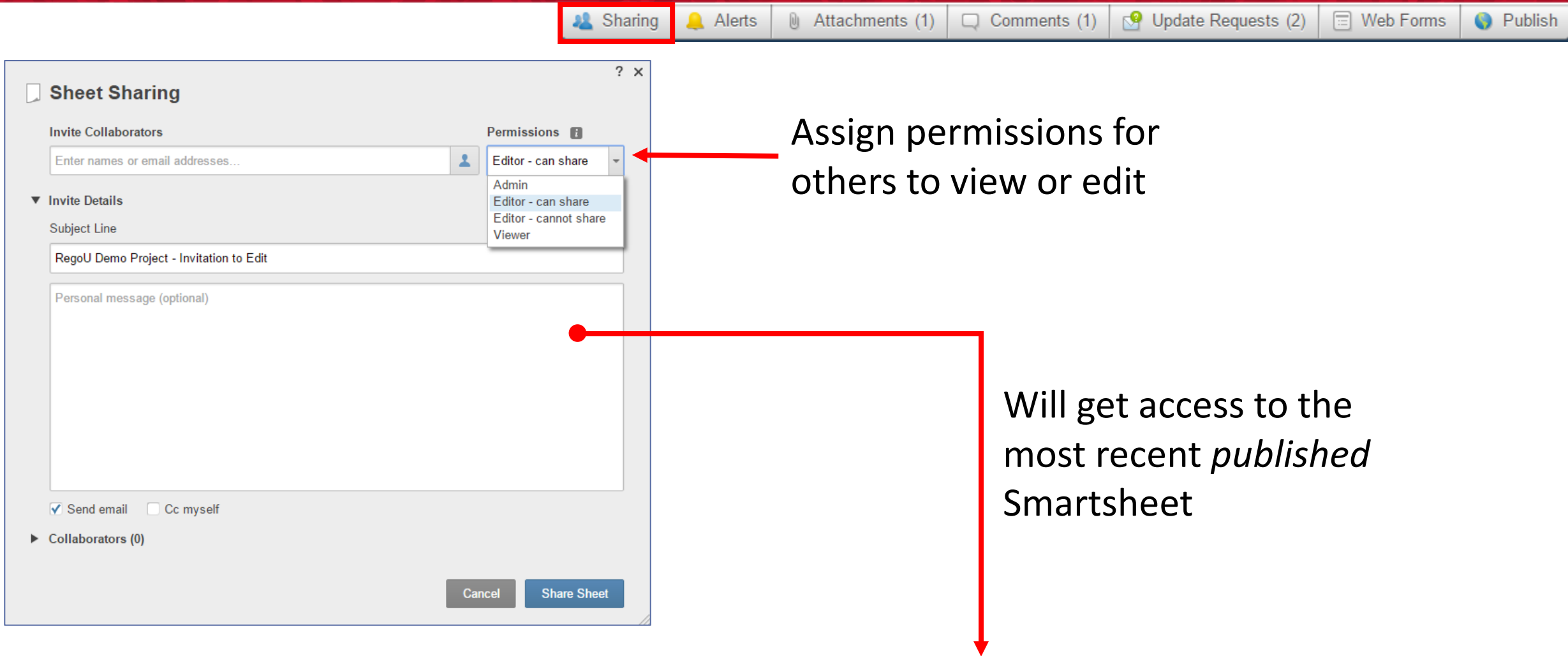


Calendar View

- Sharing a Sheet
- Alerts and Reminders
- Sending Update Requests
- Publishing the Sheet

Collaborating with
the Project Team

Sharing a Sheet



The screenshot shows the 'Sheet Sharing' dialog box in Smartsheet. The 'Sharing' tab is selected in the top navigation bar. The dialog box has a 'Permissions' dropdown menu open, showing options: 'Editor - can share' (selected), 'Admin', 'Editor - cannot share', and 'Viewer'. A red arrow points from the text 'Assign permissions for others to view or edit' to the 'Editor - can share' option. Another red arrow points from the 'Share Sheet' button to the URL below. The dialog box also includes fields for 'Invite Collaborators', 'Subject Line', and 'Personal message (optional)', along with checkboxes for 'Send email' and 'Cc myself'.

Assign permissions for others to view or edit

Will get access to the most recent *published* Smartsheet

<https://app.smartsheet.com/b/publish?EQBCT=ca85d6fe98be43d9aa8097b9910d4f5c>


Alerts and Reminders



Notifications

[New Notification](#)


Receive email notifications when other people make changes to this sheet

 **Example Notification**
Send me an email once a day when anything changes.

Reminders

[New Reminder](#)

Trigger email reminders based on a date

 **Example Reminder**
Send me an email reminder 2 days before Due Date for this sheet.

Sending Update Requests

Pending
Update
Requests

The screenshot shows a project management interface with a task list on the left and a 'Send Update Request' dialog box on the right. The task list is organized into phases: Define Phase, Design Phase, and Build Phase. The 'Build UI' task in the Build Phase is highlighted with a red box, and a red arrow points from it to the 'Send Update Request' dialog box. The dialog box has fields for 'To' (Tony Stark), 'Subject' (Update Request: Build UI), and 'Message' (Please update my online sheet.). It also has checkboxes for 'Cc me', 'Customize' (All Columns, Attachments, Comments), and 'Delivery' (Send Now). The 'Send' button is highlighted in blue.

Task ID	Task Name	Status
1		
2	Define Phase	
3	Kickoff Project	Complete
4	Elicit Requirements	In Progress
5	Develop PMP	Complete
6	Design Phase	
7	Concept Ideation	Complete
8	Internal Review	Complete
9	Client Review	Complete
10	Design Complete	Complete
11	Build Phase	
12	Stand Up DEV and PROD	Complete
13	Build UI	In Progress
14	Build Business Layer	Complete
15	Integrate with HR System	Complete
16	Build Complete	Complete
17		
18		
19		
20		
21		
22		
23		
24		

Send Update Request

To: Tony Stark (tony.stark@regoconsulting.com) x

Subject: Update Request: Build UI

Message: Please update my online sheet.

☐ Cc me

Customize: All Columns, Attachments, Comments [Edit...](#)

Delivery: Send Now [Edit...](#)

[Cancel](#) [Send](#)

Publishing the Sheet

Sharing Alerts Attachments (1) Comments (1) Update Requests (2) Web Forms **Publish**

Publish Options

Read Only - HTML
Lightweight version of sheet without attachments or comments

☐ OFF

Read Only - Full
Rich version of sheet with the ability to download attachments and view comments

☒ ON [Get Link](#)

Edit by Anyone
Rich version of sheet with the ability to edit cells and manage attachments

☐ OFF

iCal (Calendar)
Add key dates from this sheet to your non-Smartsheet calendar

☐ OFF

Publish to a unique URL. Viewing and Editing permissions based on Sharing tab.

Smartsheet.com, Inc. [US] | <https://app.smartsheet.com/b/publish?EQBCT=ca85d6fe98be43d9aa8097b9910d4f5c>

? Help

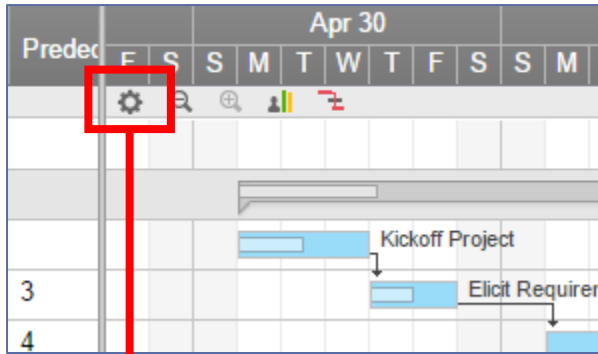
RegoU Demo Project (View Only)

	At Risk	Task Name	Status	Start Date	End Date	Assigned To	Duration	Allocation %	% Complete	Predecessor
1										
2		Define Phase		06/01/17	06/12/17		7.5d		33%	
3		Kickoff Project	●	06/01/17	06/05/17	Grant Zemont	3d	1	50%	
4		Elicit Requirements	●	06/06/17	06/07/17	Tony Stark	2d	1	50%	3
5		Develop PMP	●	06/08/17	06/12/17	Grant Zemont	2.5d	1	0%	4
6		Design Phase		06/12/17	06/16/17		4d			
7		Concept Ideation	●	06/12/17	06/14/17	Tony Stark	2d	1		5
8		Internal Review	●	06/14/17	06/14/17	Tony Stark	4h	1		7
9		Client Review	●	06/15/17	06/16/17	Tony Stark	1.5d	1		8, 5
10		Design Complete	●	06/16/17	06/16/17		0			9
11		Build Phase		06/16/17	06/30/17		10d			
12		Stand Up DEV and PROD	●	06/16/17	06/21/17	Doug Greer	3d	1		10

- Enabling Resource Management
- Resource Views

Managing Resources

Enabling Resource Management



Project Settings ? x

Dependency Settings

Timeline Display

Resource Management

☒ Resource Management Enabled

Assigned Resource column

Assigned To

Allocation % column

Allocation %

Cancel OK

Resource Views

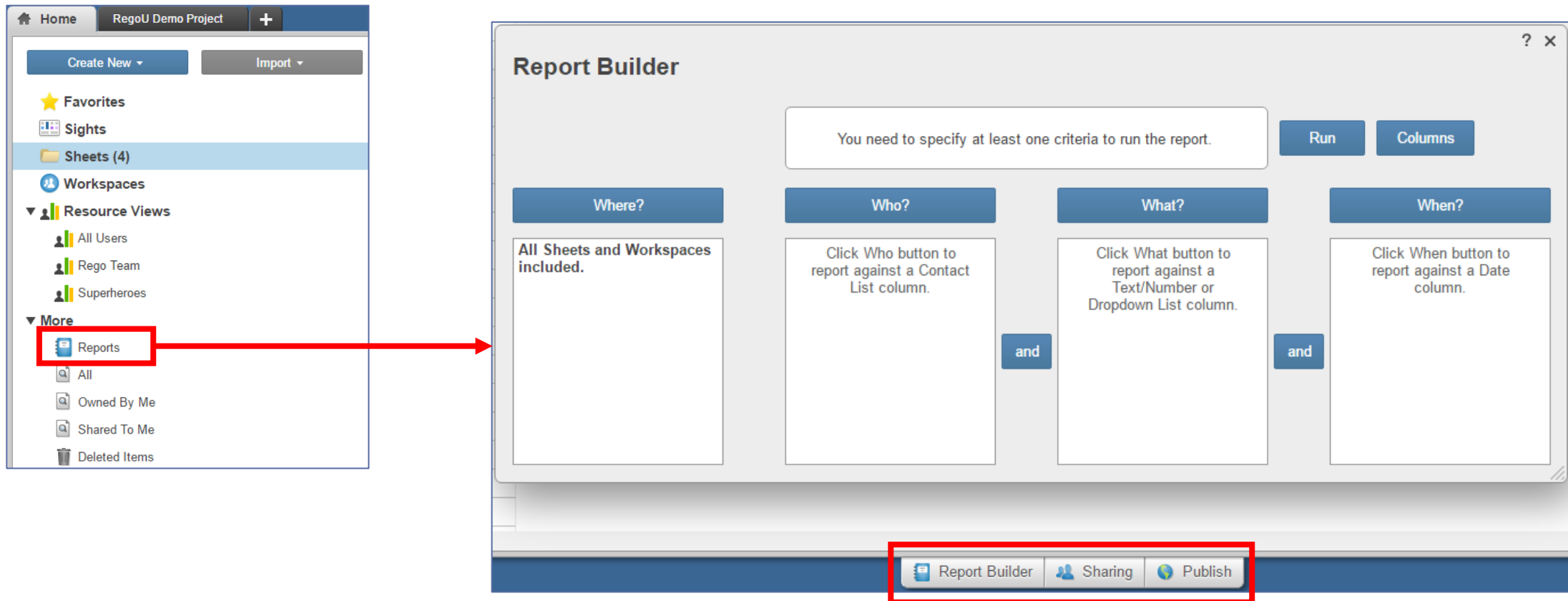
The screenshot displays the 'RegoU Demo Project' interface. On the left sidebar, under 'Resource Views', 'All Users' is highlighted with a red box. A red arrow points from this box to the main view area. The main view area shows a table titled 'All Users' with columns for dates and days of the week. The table lists users and their resource usage percentages for various projects.

	May 1, 2017							May 7, 2017							May 14, 2017							May 21, 2017							May 28, 2017			
	M	T	W	T	F	S		S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W
Abel Tuter																																
▼ Doug Greer															50%	100%							100%	150%	200%				200%	100%		
RegoU Demo Project															50%	100%	100%	100%					100%	150%	200%	200%	200%			200%	100%	
▼ Grant Zemont	100%							100%	50%																							
RegoU Demo Project	100%	100%	100%					100%	100%	50%																						
Joshua Leone																																
Michael Meyers																																
Monica Bianchi																																
Peter Parker																																
Sara Garvey																																
Scott Wallace																																
▼ Tony Stark				100%				50%	100%						100%	50%																
RegoU Demo Project				100%	100%			50%	100%	100%					100%	50%																
Yogesh R																																

- Running a Report

Reporting

Running a Report



Collaboration Tabs
(for the Report)

- RegoLink CA PPM Smartsheet Integration

Integrating with
CA PPM

CA PPM to Smartsheet Integration

- 1. Create your projects in CA PPM** - All initial tasks will seed Smartsheet
- 2. Use Smartsheet as your scheduling tool** - Use the power of all of Smartsheets' features and only sync back the data you need
- 3. Data will be updated in CA PPM on a set schedule** - 5, 10, 15 minutes, or on demand

CA PPM – Smartsheet Link

1. Start a project in CA PPM
2. Set the project to be a Smartsheet Project
3. The project is created in Smartsheet in real time, importing all tasks that were setup in PPM

Properties ▾ Team Tasks Financial Plans Risks/Issues/Changes Chargebacks

Project: SmartSheet Demo Project - Properties - Main - Project Summary

Project Summary

Project Name SmartSheet Demo Project

Project ID INV002950

Project Type [--Select--]

Project Category [--Select--]

Description

Active ☒


Scheduler Workbench

Stakeholders


Project Manager Leone, Joshua


Business Owner

Properties ▾ Team Tasks Financial Plans Risks/Issues/Changes Chargebacks Processes

Project: SmartSheet Demo Project - Properties - Ma  Open in Scheduler ▾ Scenario: [--Select--]

Integration Details

 Smartsheet Project <input checked="" type="checkbox"/>	Last Sync Date	2016-10-06 10:23:16		
Smartsheet Sheet Id	2599111842129796	Last Sync Status	Success	
Smartsheet Link	https://app.smartsheet.com/b/home?lx=CAiXgOuk733McJ6lOrkDKw		Last Sync By	Niku Administrator
Import Sheet to CA PPM <input type="checkbox"/>			Do Not Sync	<input type="checkbox"/>

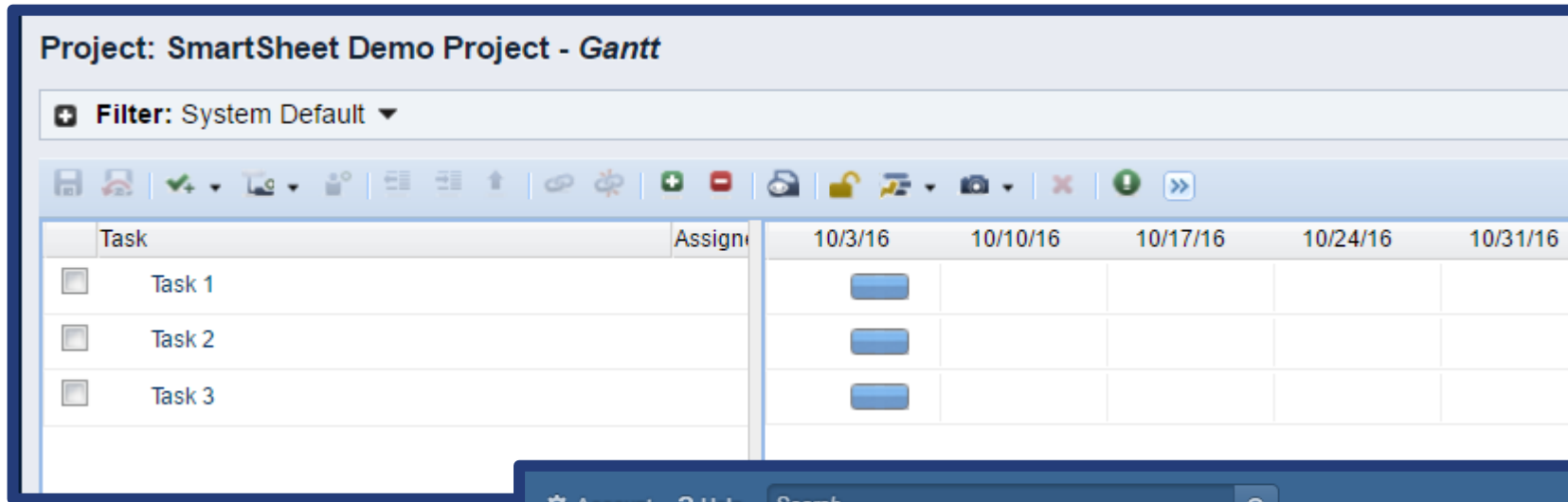
 = Locked by Process

Direct link to Smartsheet

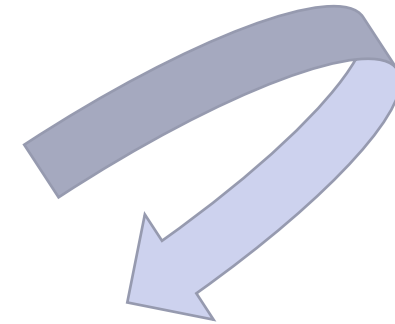
Tasks in Smartsheet

Project: SmartSheet Demo Project - Gantt

Filter: System Default



Task	Assign	10/3/16	10/10/16	10/17/16	10/24/16	10/31/16
Task 1						
Task 2						
Task 3						



This project was initiated with 3 tasks

All tasks were imported into the sheet on creation

Account

Help

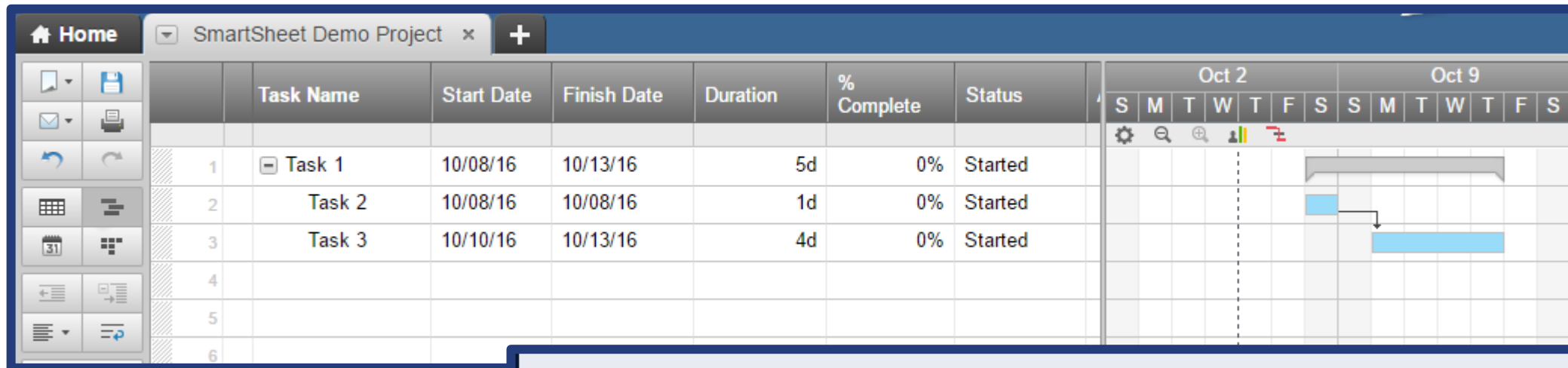
Search...

smarts

Home

SmartSheet Demo Project

Update Tasks



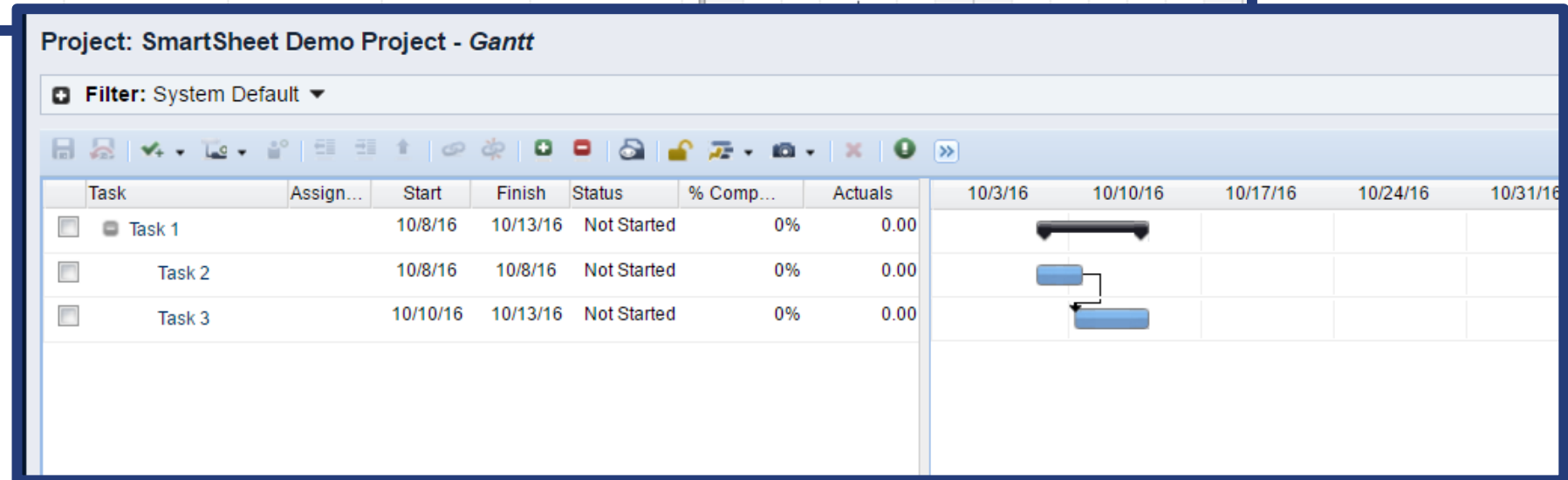
The screenshot shows the SmartSheet interface for a project named 'SmartSheet Demo Project'. On the left is a sidebar with navigation icons. The main area contains a table with task details and a Gantt chart on the right.

	Task Name	Start Date	Finish Date	Duration	% Complete	Status
1	Task 1	10/08/16	10/13/16	5d	0%	Started
2	Task 2	10/08/16	10/08/16	1d	0%	Started
3	Task 3	10/10/16	10/13/16	4d	0%	Started
4						
5						
6						

The Gantt chart on the right shows a timeline from October 2nd to October 9th. It displays three tasks: Task 1 (a grey bar from Oct 8 to Oct 13), Task 2 (a blue bar on Oct 8), and Task 3 (a blue bar from Oct 10 to Oct 13). Arrows indicate dependencies between the tasks.

Update tasks in Smartsheet
and save

After the import process runs,
all task updates are
reflected in CA PPM



The screenshot shows the 'Project: SmartSheet Demo Project - Gantt' view in CA PPM. It includes a filter set to 'System Default' and a toolbar with various icons. The main area contains a table with task details and a Gantt chart on the right.

Task	Assign...	Start	Finish	Status	% Comp...	Actuals
Task 1		10/8/16	10/13/16	Not Started	0%	0.00
Task 2		10/8/16	10/8/16	Not Started	0%	0.00
Task 3		10/10/16	10/13/16	Not Started	0%	0.00

The Gantt chart on the right shows a timeline from October 3rd to October 31st. It displays three tasks: Task 1 (a grey bar from Oct 8 to Oct 13), Task 2 (a blue bar on Oct 8), and Task 3 (a blue bar from Oct 10 to Oct 13). Arrows indicate dependencies between the tasks.

Questions?



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Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!
Don't forget to fill out the class survey.



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