

# Solution Guide

IT & OPERATIONS .04

# Office of the CIO

Find it online: [smartsheet.com/it-ops-solutions/office-of-the-cio](https://smartsheet.com/it-ops-solutions/office-of-the-cio)



Coordinate **Anything**

# About the Office of the CIO

The Office of the CIO (OCIO) is meant to accomplish one thing: give the CIO more time to strategize with other C-suite colleagues. Well-run OCIOs do this through standardized processes, clear lines of accountability, and high-level data sets. This guide is built to help you use Smartsheet to accomplish this singular goal.

## View your project portfolio in a single view

Gain insight across IT projects in a single sheet that automatically updates when changes occur.

## Plan and execute complex initiatives

Build robust project plans, complete with Gantt charts, to execute high-dependency projects.

## Track key performance indicators

Roll up KPIs from projects to gauge the health of critical initiatives.

## Make more informed decisions

Consolidate data from across initiatives to drive objective decision-making.



# Who should use this guide

Whether you're part of the CIO's exclusive team or the actual CIO, you're in the right place. Common roles/titles who benefit from this solution include:

Chief Information Officer

Deputy Chief Information Officer

Chief Technology Officer

Chief Development Officer

Compliance/Security Director

Chief IT Operations Officer

Vice President of IT

Applications Director

Systems Director

Help Desk Director

# Purpose

This guide is designed to help you better run your OCIO and, in turn, help your CIO better run the organization with Smartsheet. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

- 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 OVERSEE



IT Project  
Rollup

Oversee all IT projects to make more informed decisions.

## 2 PLAN



M&A Systems  
Integration



Succession  
Planning

Build robust project plans and intuitive checklists to better plan for business initiatives.

## 3 TRACK



KPI  
Scorecard

Consolidate project performance metrics from across the organization into a single sheet.

# IT Project Rollup

From upgrading software or rolling out new devices, IT is constantly juggling strategic initiatives, and part of the OCIO's job is to ensure they succeed. Smartsheet helps the OCIO consolidate key IT project information into a single sheet, creating a dashboard of project health, deadlines, budgets and any other relevant attributes.

The screenshot displays a Smartsheet dashboard titled "IT Project List" with columns for Project, Project Description, Owner, % Done, Status, Trend, Start Date, Target End Date, Current End Date, and quarterly progress for 2016 and 2017. Five callouts (A-E) highlight specific features: A (Hyperlink), B (Discussions), C (Link from Cell in Other Sheet), D (Performance Indicators), and E (Gantt view toggle).

Project	Project Description	Owner	% Done	Status	Trend	Start Date	Target End Date	Current End Date	2016 Q1	2016 Q2	2016 Q3	2016 Q4	2017 Q1	2017 Q2	2017 Q3	2017 Q4
IT Project List																
Asset Disposition Vendor Search	Find trusted vendor to dispose of redundant assets due to BYOD and cloud strategies.	Alex Bright	33%	Green	Down	08/08/16	09/16/16	09/23/16								
BYOD	Enable bring-your-own-device strategy across the organization.	Shari Wise	86%	Yellow	Down	03/01/16	10/21/16	10/21/16								
Cloud Migration	Migrate entire organization off our on-premises solutions to the cloud.	Kennedy Kerrigan	47%	Red	Down	02/01/16	04/01/17	05/19/17								
	Develop company-specific app for use in the field.	Shari Wise	77%	Green	Down	05/09/16	09/05/16	08/29/16								
	Relocate Pittsburgh HQ to Cleveland	Alex Bright	32%	Green	Up	06/01/16	10/31/17	10/17/17								

- A** Hyperlink to another sheet and dive into the details with a single click.
- B** Have discussions within the sheet to ask questions to the project teams.
- C** Use cell linking to pull in specific data from the source project plans.
- D** Show the performance indicators that are most relevant, like project status and trend.
- E** Toggle to Gantt view to see how project timelines stack up.

**A** Use hierarchy to group tasks so you can organize multiple integration projects in one single sheet.

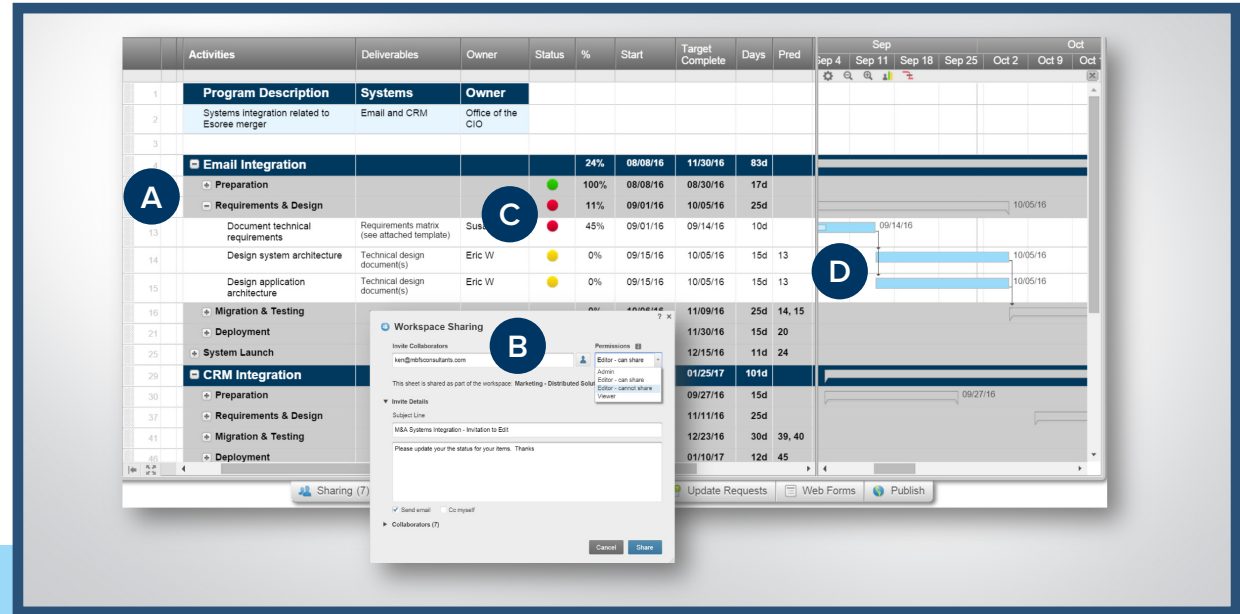
**B** Securely share the sheet internally or externally to make collaboration easy.

**C** Use symbols, like RYG balls, to visually show status

**D** Create dependencies between tasks so when a task slips, other task timelines will automatically adjust.

# M&A Systems Integration

One of the most complicated and important aspects of any merger or acquisition is the process of integrating systems. This process is a highly dependent initiative, often making it a prime candidate for failure. Smartsheet helps the OCIO gain control over this process with robust, flexible project plans to help prepare for, execute and monitor intricate system integrations.



# Succession Planning

Without proper succession planning, organizations could be left scrambling to fill key executive roles, resulting in inadequate vetting and potentially choosing the wrong candidate. With the Succession Planning template, executives can track their requirements, candidates and development plans in one place.

The screenshot displays a software interface for succession planning. The main window shows a table with columns: Competencies, Level Required, Current Level, Potential, Development Plan, and Comments. A 'Candidate: Alex Bright' section is highlighted in green. A 'Conditional Formatting' dialog box is open, showing rules for 'Potential' values. A 'Send Row' dialog box is also visible, showing a message being sent to Stephen Brown. A 'Web Form' window is partially visible in the background.

Competencies	Level Required	Current Level	Potential	Development Plan	Comments
<b>Position: Chief Security Officer (CSO)</b>					
<b>Potential Candidates</b>					
Alex Bright	CTO	IT	Enterprise Architect	<input checked="" type="checkbox"/>	Strongest IT skills, and goal is CIO position.
Shari Wise	Operations Director	Operations	Area Manager	<input type="checkbox"/>	Great communicator and leader. Needs to address IT skills and knowledge of security.
Eric Walker	Compliance Director	IT	Project Manager	<input type="checkbox"/>	Up-and-coming talent. Need to groom for executive-level position.
<b>Candidate: Alex Bright</b>					
Competencies	Required Level	Current Level	Potential for Achievement	Assign Development Plan	Comments
Budgeting	Expert	Advanced	▼	<input checked="" type="checkbox"/>	Consistent forecasts and actuals
Interpersonal Skills	Intermediate	Intermediate	—	<input type="checkbox"/>	Needs to address
Communications	Advanced	Intermediate	▼	<input checked="" type="checkbox"/>	Needs to address
Facilitation Skills	Advanced	Advanced	▲	<input checked="" type="checkbox"/>	Great work in 2015
Technological Skill	Advanced	Advanced	▲	<input checked="" type="checkbox"/>	Master of all things IT
Administrative Skill	Advanced	Advanced	▲	<input checked="" type="checkbox"/>	Good
Time Management	Advanced	Advanced	▲	<input checked="" type="checkbox"/>	Meets deadlines

- A** Track and organize all of your candidates in one sheet using collapsible sections.
- B** Use conditional formatting to highlight candidates that exceed or fall short of competency levels.
- C** Use easy-to-read symbols to represent potential assessment.
- D** Select and send rows – delivered right to the inbox – for easy sharing.

**A** Use Smartsheet's Report Builder to select the performance information you want to see.

**B** Toggle on “highlight changes” so you can quickly see exactly what's been changed.

**C** Send the sheet via email on a one-time or recurring basis.

## KPI Scorecard

As project portfolios grow, it becomes increasingly challenging for CIOs to have their pulse on key performance indicators (KPIs). The KPI Scorecard template helps the OCIO cut through the clutter by consolidating the key performance information into a single sheet. And Smartsheet pulls in the latest information from the underlying source sheets, so the information is always up to date.

The screenshot displays the Smartsheet KPI Scorecard interface. The main table lists project rollups with columns for Status, Trend, % Done, Schedule Variance, Budget Variance, and Status Update. Annotations A, B, and C highlight key features: A points to the Report Builder dialog, B points to the Highlight Changes toggle, and C points to the Send as Attachment dialog.

	Sheet Name	Primary	Status	Trend	% Done	Schedule Variance	Budget Variance	Status Update
1	IT Project Rollup	Asset Disposition Vendor Search	●	—	33%	4	-\$5,000	Vendor search has been going better than expected. Hoping to catch up on schedule soon.
2	IT Project Rollup	BYOD	●	—	86%	-1	\$0	Transition is going smoothly. Users are excited about the change.
3	IT Project Rollup	Cloud Migration	●	▼	47%	15	\$40,000	Migration is trending well over budget behind schedule.
4	IT Project Rollup	Internal App Development	●	—	77%	-6	\$5,000	Schedule is on-point if not a bit in front. Budget will be slightly over planned amount.
	IT Project Rollup	Office Relocation	●	▲	32%	-11	-\$25,000	Relocation is going great! Everything is moving ahead of schedule and under budget.

**Report Builder (A):** Select columns to include in Report results: % Done, Actual Budget, Budget Status, Budget Variance, Created (system column), Created By (system column), Current End Date, Duration, KPI Scorecard.

**Highlight Changes (B):** ON. Highlight changes in the last: Hour since 09/22/15 02:34 PM. Background color for changed cells: Yellow.

**Send as Attachment (C):** Attach as: PDF (default), Excel. Delivery: Schedule to send later or on a recurring basis.



# Jump-Start Your Audit, Compliance & Security Efforts 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/it-ops-solutions/office-of-the-cio](https://smartsheet.com/it-ops-solutions/office-of-the-cio). 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](https://help.smartsheet.com)

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

**Smartsheet Community** - [community.smartsheet.com](https://community.smartsheet.com)

Ask questions, share best practices, and get help.

**Submit your question** - [solutions@smartsheet.com](mailto: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](https://help.smartsheet.com/customer/portal/emails/new)

Share your thoughts or suggestions about Smartsheet or our Solutions.











**Plans and Pricing** - [smartsheet.com/pricing](https://smartsheet.com/pricing)

Enjoy your 30-day free trial.

# Smartsheet Cheat Sheet

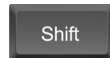
## Keyboard Shortcuts

### 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.




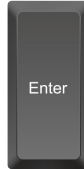

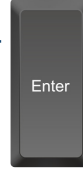
To insert multiple rows at once, press



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: 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

# 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](https://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](https://smartsheet.com/text-formulas)

Find, Replace, capitalizing text, etc

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

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

**[Advanced Formulas](https://smartsheet.com/date-formulas)** - [smartsheet.com/date-formulas](https://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](https://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](https://smartsheet.com/formula-error-messages)

What they mean, and how to troubleshoot



smartsheet

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