



Smartsheet Virtual User Group: Control Center Roundtable

June, 2021

Agenda

10:00am Welcome from Smartsheet

10:05am Business Insight: Melanie Corbin, MedPOINT Management

10:30am Questions & Answers

10:35am Breakouts

10:50am Product Roadmap

11:00am Close of group

Introductions:



Melanie Corbin

Sr. Supervisor, HIT Business Operations
MedPOINT Management



James Allen

Sr. PMM
Smartsheet



Kelsey Hayden

PMM
Smartsheet



Business Insight: MedPoint Management

Melanie Corbin

Senior Supervisor HIT Business Operations



Business Overview

MedPOINT Management, Inc. (MPM) provides all aspects of managed care management services to Independent Physician Associations (IPAs) and hospital clients. I am our Smartsheet Administrator, and supervise 2 of our IT Teams - a system configuration team and our web portal support team.

Because I wear so many hats at MPM, it is critical that I automate as much as possible....

The Business Need

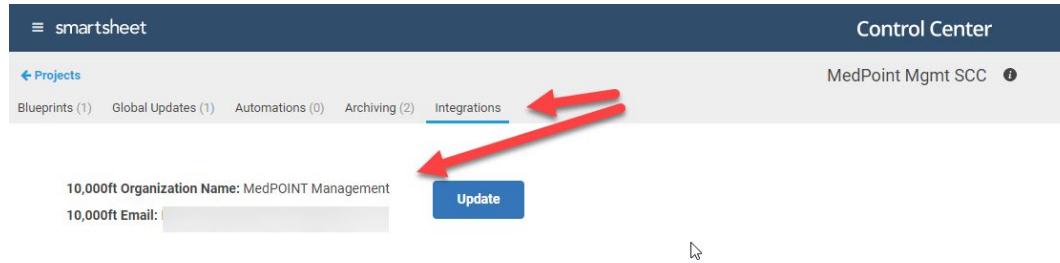
MedPOINT purchased 10,000 FT, Dynamic View, and Control Center with our last renewal.

10,000 FT (10K) is a great tool for managing resource workload and availability, but the integration with Smartsheet had some issues:

1. It required a project plan to be created (Not all of our projects have project plans)
2. It moved minimal data into 10,000 FT and still required manual entry to complete project setup in 10K

Just as we were finishing our Control Center implementation, the integration between Control Center and 10,000 FT was released, providing a huge improvement in the process of moving projects from Smartsheet to 10,000 FT.

Note: There is no extra cost for the integration if you have both Control Center and 10K FT, but it does have to be “turned on” by Smartsheet. Contact your Customer Success Manager if yours has not been turned on.



The screenshot shows the Smartsheet Control Center interface. At the top, there is a dark blue header with the Smartsheet logo on the left and 'Control Center' on the right. Below the header is a light gray navigation bar with several tabs: 'Projects' (with a left arrow), 'Blueprints (1)', 'Global Updates (1)', 'Automations (0)', 'Archiving (2)', and 'Integrations' (which is highlighted with a blue underline). To the right of the navigation bar, it says 'MedPoint Mgmt SCC' with an information icon. Below the navigation bar, there is a form with two fields: '10,000ft Organization Name: MedPOINT Management' and '10,000ft Email:'. To the right of these fields is a blue 'Update' button. Two red arrows are overlaid on the image: one points from the 'Integrations' tab to the 'Update' button, and the other points from the 'Update' button back to the 'Integrations' tab.

Connecting your Blueprint:

There are 3 places where you will need to update your Blueprint:

1. Blueprint Components - Enable the 10,000ft panel

The screenshot displays the Smartsheet Control Center interface. At the top, the 'smartsheet' logo and 'Control Center' title are visible, along with 'Help' and 'MC' icons. The main section is titled 'Blueprint Components' with a subtitle 'Options for connecting sheets in projects to sheets / reports outside the project'. A red arrow points to this title. Below the title, it says '4 of 3 component(s) selected'. There are four toggle switches, all of which are turned on (indicated by a blue checkmark in the circle). The toggles are for 'Intake sheet', 'Summary rollup', 'Dynamic report scope', and '10,000ft panel'. A second red arrow points to the '10,000ft panel' toggle. On the right side, there is a sidebar titled 'MPM Projects' with a list of settings: 'Blueprint Basics', 'Source Template Settings', 'Blueprint Components' (which is selected), 'Intake Settings', '10,000ft Resource Plan Settings', '10,000ft Connection Settings', 'Profile Data Selection', 'Customize Profile Data', 'Blueprint Summary', and 'Dynamic report scope settings'.

smartsheet Control Center Help MC

Blueprint Components
Options for connecting sheets in projects to sheets / reports outside the project

4 of 3 component(s) selected

Intake sheet ☒
Projects are created using profile data from an intake sheet

Summary rollup ☒
Project profile data will be linked to a summary sheet for portfolio level visibility

Dynamic report scope ☒
Update the "Where?" criteria on a report so only specific templates from projects are included

10,000ft panel ☒
Connect a template to a 10,000ft resource plan

MPM Projects

- Blueprint Basics
- Source Template Settings
- Blueprint Components**
- Intake Settings
- 10,000ft Resource Plan Settings
- 10,000ft Connection Settings
- Profile Data Selection
- Customize Profile Data
- Blueprint Summary
- Dynamic report scope settings

Connecting your Blueprint:

2. 10,000ft Resource Plan Settings - Tell Control Center where to get the data to add into 10K FT - including your Custom 10K FT fields

Project URL:
this is the
column in
your Intake
Sheet where
Control
Center will
add a link to
the 10K FT
project. You
may need to
add a column
in your Intake
sheet for this
if it didn't
already exist.

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Control Center

10,000ft Resource Plan Settings

Settings for creating resource plans in 10,000ft. These are global settings for any blueprint that use this intake sheet.

Edit Settings

10,000ft Status
Select the column that will be updated with the Project Type field from 10,000ft

Project Type (10K FT)

10,000ft Information Fields
Select the columns from the intake sheet to fill in the 10,000ft resource plan information fields

Project Name

Project Name (10K FT)

Start At

Start Date (10K FT)

Custom 10,000ft information fields

Select the fields...

+ Add or manage fields

Type

Type

Intake Status

Intake Status

Priority

Priority

Project URL
Select the column that will be updated with a link to open the resource plan in 10,000ft

10K FT Link

Project Description

Description

End At

End Date (10K FT)

Requesting Department

Requesting Department

PID

Project ID

MPM Projects

Blueprint Basics

Source Template Settings

Blueprint Components

Intake Settings

10,000ft Resource Plan Settings

10,000ft Connection Settings

Profile Data Selection

Customize Profile Data

Blueprint Summary

Dynamic report scope settings

Naming

Permissions and Sharing

smartsheet

Connecting your Blueprint:

3. 10,000ft Connection Settings - Which Provisioned Template will get automatically connected to your 10K FT project?

Note: If you have more than 1 Project Plan template (I have 3), and you select a different one when you provision, you will need to manually disconnect 10K from the default template and connect it to the one you selected.

The screenshot displays the Smartsheet Control Center interface. At the top, the 'smartsheet' logo is on the left, 'Control Center' is in the center, and 'Help' and 'MC' icons are on the right. The main content area is titled '10,000ft Connection Settings' and includes the instruction 'Select the template sheet that will be connected to the 10,000ft resource plan'. Below this is a dropdown menu currently showing 'Project Plan'. A list of available templates is shown below the dropdown: BRD, Monitoring & Audit Reports, Project Dashboard Metrics, Weekly Status Tracker, App Enhancement Backlog & Request Form, Backlog, and Project Plan. On the right side, there is a sidebar titled 'MPM Projects' containing a vertical list of settings: Blueprint Basics, Source Template Settings, Blueprint Components, Intake Settings, 10,000ft Resource Plan Settings, 10,000ft Connection Settings (which is selected with a blue circle), Profile Data Selection, Customize Profile Data, Blueprint Summary, and Dynamic report scope settings. The Smartsheet logo is at the bottom right.

smartsheet Control Center Help MC

10,000ft Connection Settings

Select the template sheet that will be connected to the 10,000ft resource plan

Project Plan

- BRD
- Monitoring & Audit Reports
- Project Dashboard Metrics
- Weekly Status Tracker
- App Enhancement Backlog & Request Form
- Backlog
- Project Plan

MPM Projects

- Blueprint Basics
- Source Template Settings
- Blueprint Components
- Intake Settings
- 10,000ft Resource Plan Settings
- 10,000ft Connection Settings**
- Profile Data Selection
- Customize Profile Data
- Blueprint Summary
- Dynamic report scope settings

smartsheet

Connecting your Blueprint:

Optional but helpful: Intake Settings

- We use Project IDs extensively. While they can be loaded into one of the columns in 10K FT, they are only searchable if they are part of the project name.
- I created a column formula that joins Project ID + "-" + Project Name
- THIS is the column I use in the Intake Settings for the "Project Selection Column" and in the 10,000 ft Resource Plan Settings

smartsheet

Control Center

Help MC

Intake Settings

Select what sheet to use for your intake process and what options apply

Intake Sheet *

Select the sheet that will contain the projects to be created

In-Flight Intake Sheet

Project Selection Column *

Select the column that will contain the project names

Project Name (10K FT)

Approval Column

Select the column that will approve which projects can be created

If you don't select a column, all projects/rows will be available

Approved

Approval Value

Project Link Column

Select the column that will contain the created project link

Project Link

Intake Attachments

Select the sheet(s) that will receive sheet attachments from the intake row

1 BRD 2 Project Plan - Non-BA Projects

Filter Projects by User

Select the contact column that will filter projects by the current user

Additional Filters

User may apply these filters when selecting projects (max of 3)

Show Advanced Intake Options

MPM Projects

Blueprint Basics

Source Template Settings

Blueprint Components

Intake Settings

10,000ft Resource Plan Settings

10,000ft Connection Settings

Profile Data Selection

Customize Profile Data

Provision your Projects

Once you have completed your Blueprint setup, 10K FT projects will automatically be created for every project you provision.

Project Managers will build their project plans and sync to 10K FT using the 10K FT Panel in their Project Plan.

The screenshot displays the Smartsheet 10,000ft interface. On the left, a project plan grid is visible with columns for 'Target End Date' and 'Assigned To'. The grid shows several rows with dates and names like 'AR Antho Roble', 'CB Claud Banas', and 'MC Melan Corbin'. The main panel on the right is titled '10,000ft :'. It shows a project named '1312-Testing new auto...' with a date range from 05/14/21 to 09/24/21. Below this, there is a section for '10,000ft updated 24 days ago by Melanie Corbin' with a 'View Activity' link. The panel also lists three team members: 'Anthony Robles' (Business Analyst, Lead), 'Claudia Banas' (Business Analyst, Supervisor), and 'Melanie Corbin' (Administrator, Supervisor). Each team member has a corresponding 'Add to 10,000ft' button and a progress bar showing 20% completion. The top of the interface features a search bar and a 'Share' button. The bottom right corner of the image shows the Smartsheet logo.

Create a Feedback Loop

Control Center does not load every data element into 10K FT

- Most notably: Client & Project Code (our Project ID)

But you CAN load them using 10K FTs new “Project Update” feature - if you have the 10K FT project_id

So, I have a process that I run at least monthly

Approve & Provision

This portal is for HIT Management to close out completed work, and assign new work.

It displays “In progress” items to close completed work and the same top priority list (as the triage sheet) to assign new work

Close Old & Assign New



Use Control Center to provision the Approved project. This will automatically create the 10K FT project as well.

If you use a template other than the BA Template, you will need to manually disconnect the BA Project Plan from the 10K FT project and manually connect the correct Project Plan template to the 10K FT Project.

Provision



- Open the project in 10K FT / Settings / Project Update
- Export Project List
- Attach to [10K FT Project Details](#)
- Open the 10K FT Proj Update Report (next section)
- Delete existing data from the exported project list. Copy all rows from the 10K Proj Update Report to the Excel File.
- Change Start/Finish Date formats to yyyy-mm-dd
- Save
- In 10K FT Add/Update Projects screen, Choose File and Upload
- This will update the remaining fields (Project Type, PID, etc)

Update



Once the project is provisioned, open the Project Plan, add the TM to the Assigned To - with start/end dates that match the expected duration of the project. Update their % allocation, if known. Then Sync the project assignment with 10K FT in the 10K FT Panel.

If this is a non-BA Project Plan - you will need to disconnect 10K FT from the BA Project Plan and connect it to the Non-BA Project Plan

Feedback Loop Process

So, I have a process that I run at least monthly (Or whenever I think about it).

1. Export the Project List from 10K FT (Settings / Project Import / Export Project List)
2. Attach that list to a Smartsheet “Project Details” sheet I created just for this data (Data Shuttle uploads upon attachment).
3. My Intake Sheet looks up the 10K project_id from the Project Details sheet (Using an Index/Match formula)
4. I then run a report from Smartsheet that pulls the same data elements as exist on the Export Project list.
 - a. Copy all rows from my report back into the Export Project List template.
 - b. Reformat the Date columns (Must be formatted as yyyy-mm-dd)
 - c. Save and import back into 10K FT.

Project Closure

The Archive process in Control Center will not Archive your 10K FT project.

My process:

1. Update project to Completed in Intake Sheet
2. Run Control Center Archive Rule (set to archive anything marked Completed or Cancelled)
3. Open 10K FT, edit Project Details, and Archive



Maintain, Close & Archive

If information changes in the In-Flight Intake sheet, it can be updated in 10K FT using this report to copy data to the 10K FT "Update Projects" template.

Make sure to change the date formats in the template to **yyyy-mm-dd** before uploading

10K FT Proj UPDATE Report



Projects & Tasks must be marked completed in the "Close Old & Assign New" portal (above).

To archive in the In-Flight sheet and 10k, use the links below.

Control Center: [Manage Program / Archiving / Archive Completed/Cancelled Projects](#)

10K FT: [Open the project / Project Settings / Archive Project](#)

Archive



Archive



If needed, this report can be used to manually load a project from the In Flight Intake Sheet into 10K FT

10K FT NEW Proj Export Report



Make your life easier....


- I created a dashboard with widgets for every step in our Portfolio Lifecycle
- Links open reports, sheets, 10K FT, Control Center as needed for each step
- Rich Text explains each step, in case I'm not around and someone else needs to run it

Intake

This will open the Intake DB

This DB is available to all submitters (and the same for all submitters)


Intake Portal



This will open the Parking Lot Sheet.

New requests should be reviewed for completeness (can also be deleted if needed). Once reviewed, change the Intake status to "Pending Start"

New Request Review




This portal is for HIT Management to review request and identify

- Initiative
- Task vs Project
- Resources who COULD work on the task

Only the top priority (A_01 - A10, B_01 & B_02) requests are displayed

Triage Top Requests




Approve & Provision

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- In 10K FT Add/Update Projects screen. Choose File and Upload
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10K FT NEW Proj Export Report



Results & Benefits

- Eliminate Manual Data Entry
- Automatic connection between Smartsheet Project Plans and 10K
- My “Feedback Loop” is Optional but allows you to make updates in 10K when project details in your Intake sheet change
- Dashboard provides an outline of steps and easy access to every tool needed

Q&A

Breakout Sessions!



Share your Breakout Insights & Learnings:

- High Value insights
- Key Learning
- Mistakes you've learned from

After the Group:

- Let us know if you'd like to attend future groups like this
- Network with each other, feel free to reach out to usergroups@smartsheet.com for assistance.
- Most importantly, we need your feedback on the content and format of future Groups.
- Sign up for the next one!

Legal

This presentation may contain forward-looking statements for which there are risks, uncertainties, and assumptions. If the risks materialize or assumptions prove incorrect, Smartsheet's actual results could differ materially from results implied by the forward-looking statements. Forward-looking statements include any statements regarding strategies or plans for future operations; any statements concerning new features, enhancements or upgrades to our existing product or plans for future products; and any statements of belief.

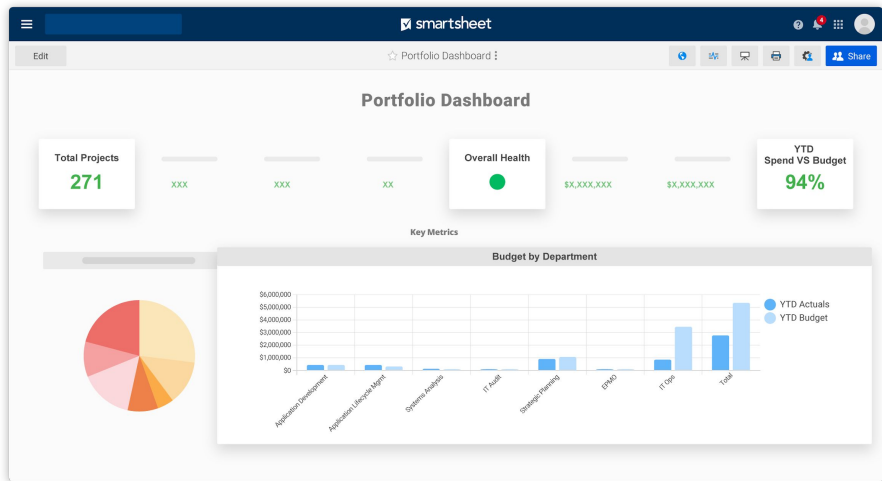
Any unreleased services, feature, functionality or enhancements reference in any Smartsheet document, roadmap, blog, our website, press release or public statement that are not currently available are subject to change at Smartsheet's discretion and may not be delivered as planned or at all. Customer who purchase Smartsheet services should make their purchase decisions upon services, features, and functions that are currently available.

Control Center

Automate project consistency and visibility at scale

Control Center builds on the core functionality of Smartsheet; to deliver all the benefits of dynamic work management, and scale that to your organization and enterprise with best practices, consistent methodologies, and project and portfolio level visibility built in.

- Consistency
- Visibility
- Scale

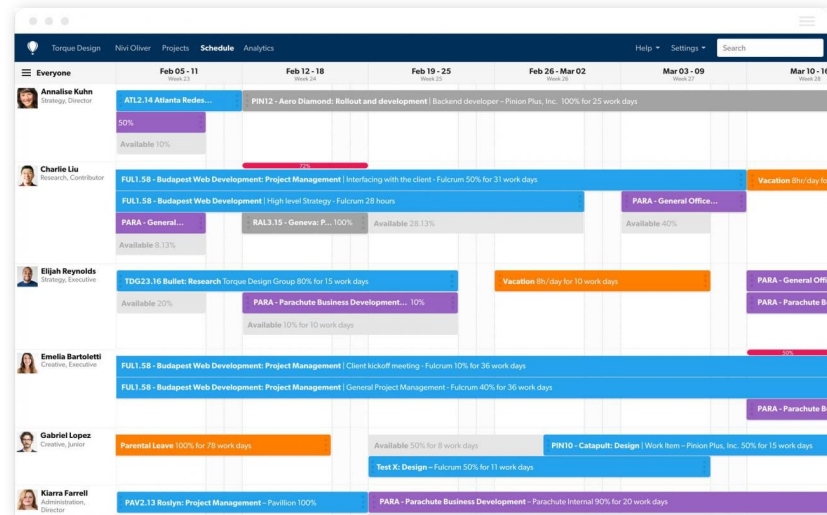


Ongoing enhancements 2021

10,000ft Resource Management

Build the best team for the job, keep projects on track, and confidently forecast business needs with real-time reporting.

- **SOX-compliant** time approvals
- **Auto-sync** assignment data across Smartsheet and 10,000ft
- **Federated user identity** combines 10,000ft and Smartsheet users under the same management system
- **Control Center support for 10,000ft** automates workflows to connect new sheets and project plans



2021 ongoing

Closing

James Allen

Sr. PMM

Smartsheet



Business Overview



Charter Communications

We are a leading broadband connectivity company and cable operator serving 31 million customers in 41 states through the Spectrum brand. We offer a full range of residential and business services including Spectrum Internet, TV, Mobile, and Voice.

Spectrum Mobile

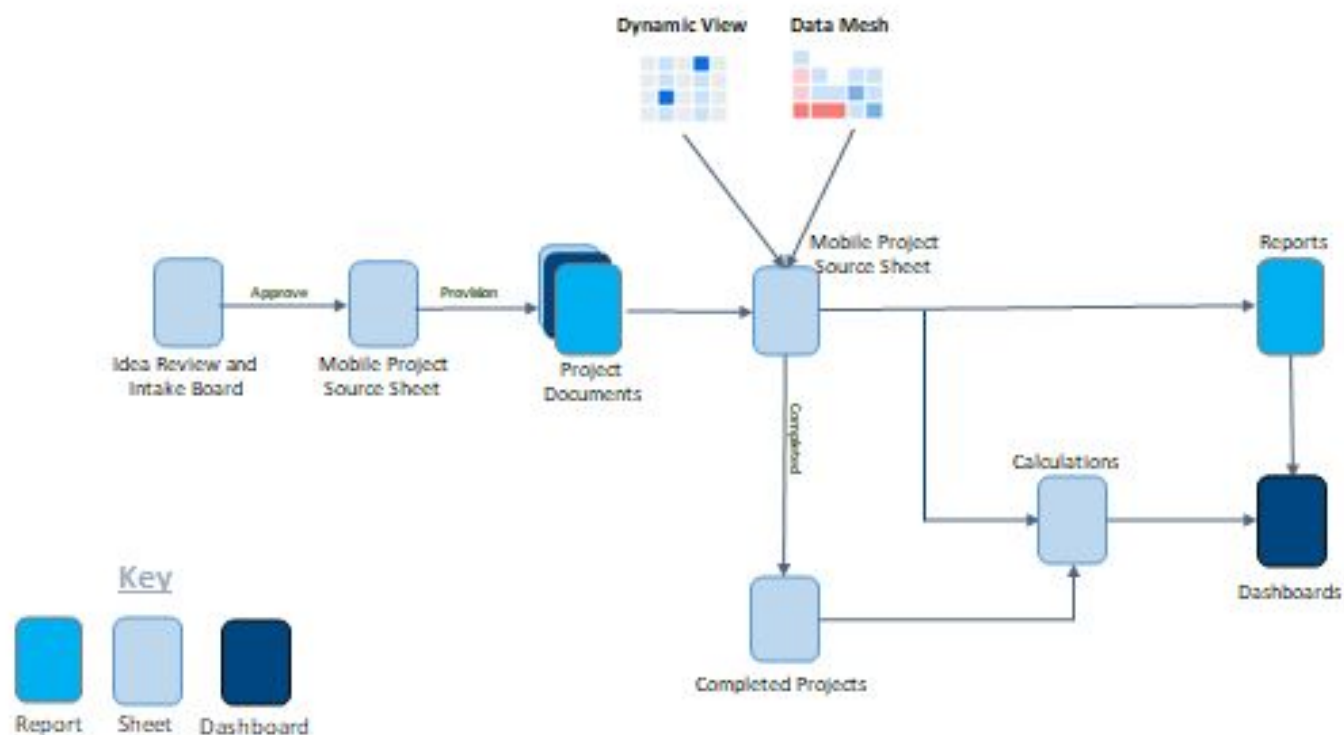
The nation's fastest-growing mobile provider and is designed to provide customers with the highest quality experience, value and flexibility, with the fastest overall speeds combining Spectrum's nationwide 5G and 4G LTE coverage and network of Out-of-Home WiFi access points and Home Internet.

The Numbers



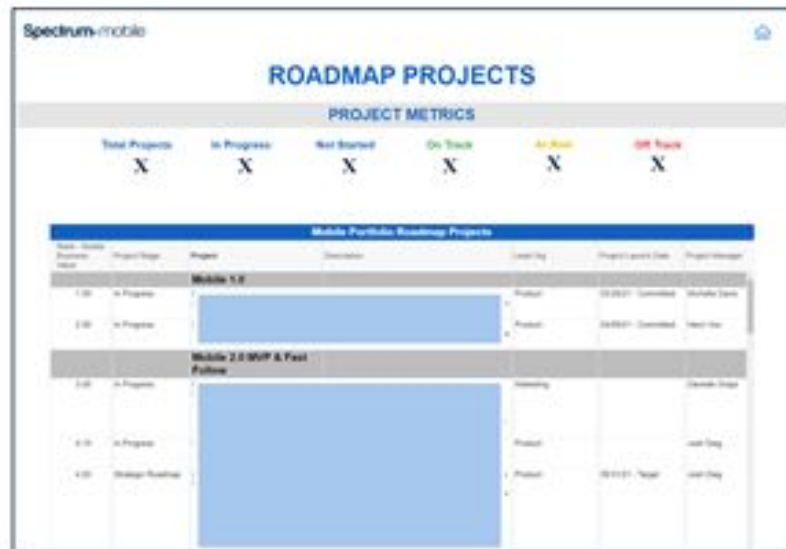
 smartsheet

Spectrum Mobile Smartsheet Architecture



Mobile Portfolio Metrics, Reports and Dashboards

Portfolio Level Views



Team Dashboards



Thank you for Attending!

