# Project Management Users Group SMARTSHEET

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Joey Razzano, MBA

# Joey Razzano, Operations, Public Health Division, Oregon Health Authority

- Accreditation & Accountability Coordinator/Collaboration Strategist
- Smartsheet Core (Certified 2022)
- Smartsheet System Administrator (Certified 2022)
- Smartsheet Project Management Certified (Certified 2023)
- Early Adopter Program
- Smartsheet Portland Area User Group presenter 2019
- Smartsheet ENGAGE presenter September 2020
- Smartsheet Sessions trainer 2019-2022
- Oregon State Smartsheet User Group Team Owner (OSMART)
- Masters Business Management, Willamette University

# What I'll cover today

- Introduction to Smartsheet (Video)
- History/Background
- Applications/Use Cases
- Comparison with other options
- Features/Demonstration
- Questions?

# Introduction to Smartsheet

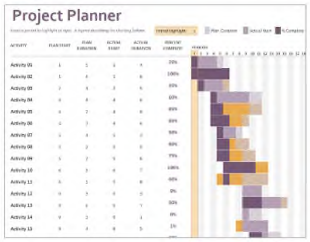
## History/Background

- Before Smartsheet was available/approved on the exceptions list, staff managing projects at Public Health could use excel (small projects) or Microsoft Project (large projects).
- PHD adopted Smartsheet for performance management system (previously on excel) ROI = $25k use case reduction in time savings/reporting prep 3 days to 4 hours with increased reporting accuracy.
- Evolution/examples of use cases at PHD:
  - Data collection
  - Dashboard reporting for data visualization
  - Workflow approvals with auditing capability
  - Automated update approval request and tracking
  - Document generation with version control
  - Unlimited collaborators
  - User-driven low code, no code solutions

Office of the State Public Health Division
OPERATIONS

# Project Management Tools at OHA today

- Microsoft Project
  - Large projects, gold standard(?)
- Planner App in Teams
  - Can't use in restricted channels
  - Can't restrict access
- Excel Gantt Template
  - Visual, not robust
- Smartsheet
  - Combination of Access, excel, survey monkey, adobe, MS Flow, Chat
- Basecamp
  - Not quantitative in nature




Gantt project planner

Provided by: Microsoft Corporation

This Gantt chart Excel template makes for a perfect project planner, allowing you to track and synchronize the activities of a project. Based on the long-standing Gantt chart model, this project planning template in Excel uses a simple visual representation to show how a project will be managed over time. You can enter the start dates, duration, and current status of each task and share them with your team to keep task owners accountable. This Excel Gantt chart template can accommodate both large and small projects for both short and longer time periods. This is an accessible template.

Download size: 13 KB

# Comparison of Software Platforms

| Name | Microsoft Project | MS Planner (Teams) | Excel | Smartsheet | Basecamp |
|---|---|---|---|---|---|
| License Required? | Yes | No | No | Yes | Yes |
| Best For | MS Project is a solution for project and project portfolio management, used by project managers, project teams and decision makers. | Microsoft Planner is project management application that allows teams to create, assign and organize work visually to facilitate teamwork, as well as progress visibility and coordination. | The Gantt chart template is a simple visual representation of how a project will be manageed over time. Can be customized/scalable for large or small projects. | Smartsheet's intuitive online project management app is used broadly across organizations to track and manage diverse types of work for teams large and small, from enterprise companies to SMB's. | Entrepreneurs, freelancers, small businesses and groups inside large organizations. |
| **Product Features** | | | | | |
| Agile Methodologies | Yes | Yes | Yes | Yes | No |
| Budget Management | Yes | Yes | Yes | Yes | No |
| Client Portal | No | No | No | Yes | Yes |
| Collaboration Tools | Yes | Yes | Yes | Yes | Yes |
| Cost-to-Completion Tracking | No | No | Yes | Yes | No |
| Customizable Templates | Yes | Yes | Yes | Yes | No |
| Gantt Charts | Yes | Yes | Yes | Yes | No |
| Idea Management | Yes | | | Yes | No |
| Kanban Board | Yes | Yes | No | Yes | No |
| Milestone Tracking | Yes | Yes | Yes | Yes | Yes |
| Portfolio Management | Yes | Yes | Yes | Yes | No |
| Resource Management | Yes | No | Yes | Yes | No |
| Time & Expense Tracking | Yes | No | Yes | Yes | No |
| Traditional Methodologies | Yes | Yes | Yes | Yes | No |
| Platform | Web/ Installed/ Mobile | Web/ Installed/ Mobile | Web/ Installed/ Mobile | Web/ Installed/ Mobile | Web/ Installed/ Mobile |

# Security and Compliance

## Security

Keeping your data secure is our most important job. Smartsheet was built from the ground up with strict security requirements and protocols to secure your data, give you control of user access, and provide you with methods to safely share information inside and outside of your organization.

## Privacy

When you use Smartsheet, you own and control your data. At Smartsheet, we understand that you are entrusting us with your most valuable asset: your data. That's why we protect customer data with a rigorous combination of infrastructure and procedures, and we are committed to delivering a secure platform that adheres to stringent privacy standards.

## Compliance

Spend less time worrying about compliance and more time running your business. Smartsheet has customers across many industries. Learn how Smartsheet's underlying security, features and tools can support your compliance with various regulatory and industry standards.

## Availability

A platform designed and tested for resiliency. Smartsheet delivers a secure and resilient service at scale to more than 83,000 brands and millions of information workers.

## Governance

Gain access to extensive user controls and visibility into how your organization is using Smartsheet. Easily manage Smartsheet in your organization with robust enterprise account and data administration tools. Take advantage of global security controls to manage and audit access, ownership, and usage, set permissions, dig into audit trails, and configure your plan and users on a global scale.

Oregon Health Authority

# Security Concerns

- Cloud workbook approved for Level 2 data
- No PHI,PII

| Level | 1 - Published | 2 - Limited | 3 - Restricted | 4 - Critical |
|---|---|---|---|---|
| **Risk Sensitivity** | Low | Sensitive | High | Extreme |
| **Policy 107-004-050 Definition** | Information that is not protected from disclosure, that if disclosed will not jeopardize the privacy or security of agency employees, clients, and partners. This includes information regularly made available to the public via electronic, verbal, or hard copy media. | Information that may be protected from public disclosure, but if made easily and readily available, may jeopardize the privacy or security of agency employees, clients, or partners. Agency shall follow its disclosure policies and procedures before providing this information to external parties. | Information intended for limited business use that may be exempt from public disclosure because, among other reasons, such disclosure will jeopardize the privacy or security of agency employees, clients, partners, or individuals who otherwise qualify for an exemption. Information may be accessed and used by internal parties only when specifically authorized to do so in the performance of their duties. External parties requesting this information for authorized agency business may be under contractual obligation of confidentiality with the agency prior to receiving it. | Information that is deemed extremely sensitive and is intended for use by named individual(s) only. This information is typically exempt from public disclosure because, among other reasons, such disclosure would potentially cause major damage or injury up to and including death to the name individual(s), agency employees, clients, partners, or cause major harm to the agency. |
| **Policy Examples** | • Press releases<br>• Brochures<br>• Pamphlets<br>• Public access web pages<br>• Materials created for public consumption | • Enterprise risk management planning documents<br>• Published internal audit reports<br>• Names and addresses that are not protected from disclosure | • Network diagrams<br>• Personally identifiable information<br>• Other information exempt from public records disclosure | • Disclosure that could result in loss of life, disability, or serious injury<br>• Regulated information with significant penalties for disclosure such as information covered under the Health Information Portability Act or the Internal Revenue Service<br>• Information that is typically exempt from public disclosure |

# Over 2,000 documented use cases across all departments

| Sales | IT | Operations | Marketing | Engineering | Legal |
|---|---|---|---|---|---|
| Lead assignment<br>Sales enablement<br>Pipeline management<br>Contract management | Software migration planning<br>Help desk<br>IT ticketing<br>Managing development | Schedule deliveries<br>Track invoices<br>Sales operations<br>Vendor requests | Manage brand launches<br>Investor relations tracking<br>Event planning<br>Website management | Feature development<br>Bug tracking<br>Case management | Patent app processing<br>Case management<br>Client onboarding<br>Due diligence review |
| **Project Management** | **Administrative** | **Human Resources** | **Finance** | **Customer Service** | **Industry Verticals** |
| Product initiation<br>Commissions calculation<br>M&A integration | Travel scheduling<br>Meeting scheduling<br>Compliance | Employee onboarding<br>Off-boarding processing<br>Talent acquisition<br>Benefit tracking | Audit preparation<br>Purchase order management<br>Expense approvals<br>Budget approvals | Issue escalation<br>Assign tickets<br>Schedule employees<br>Returns processing | Claims adjusting<br>Clinical trial tracking<br>Parts ordering<br>Contractor scheduling<br>Property management |

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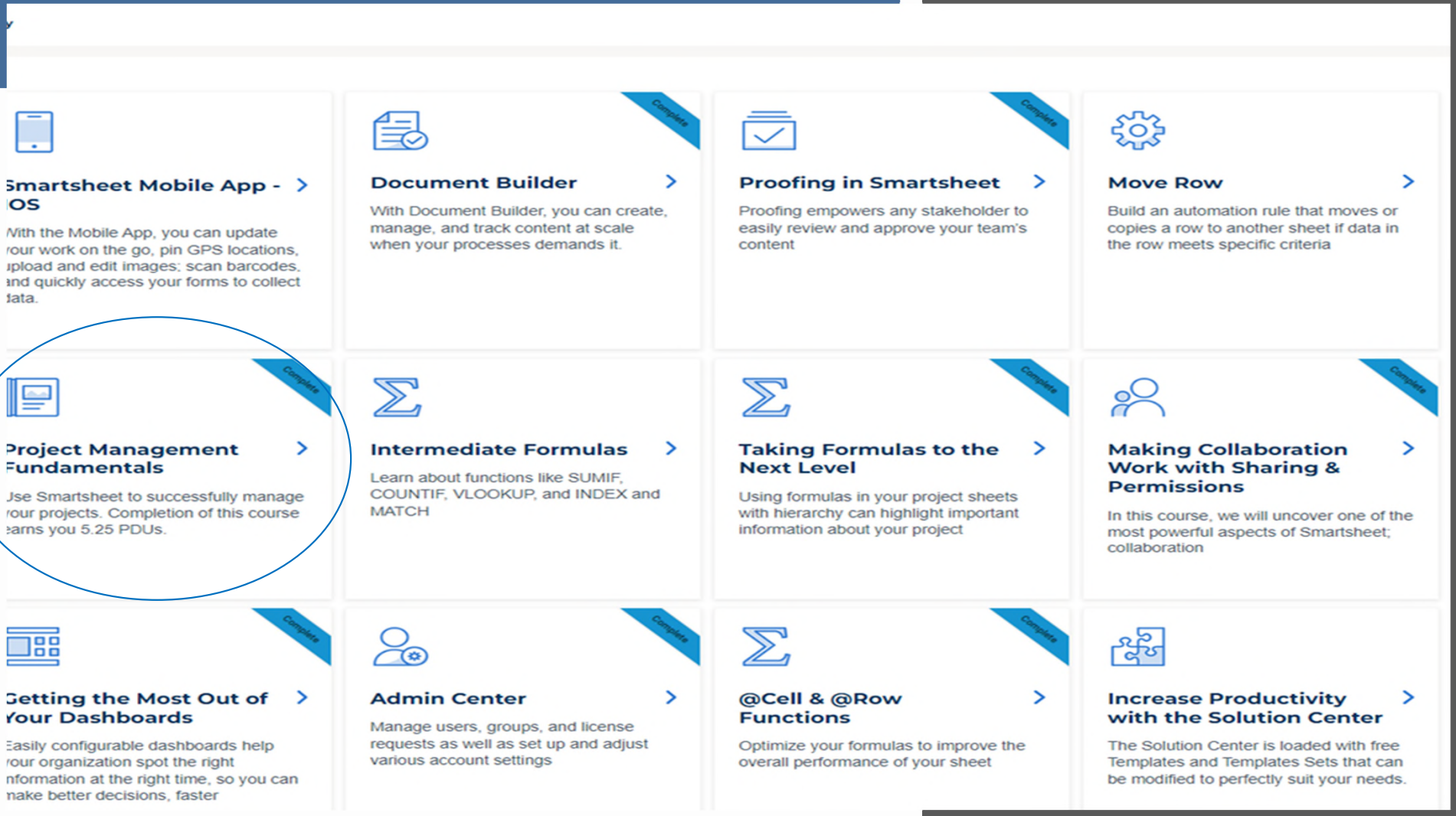
# Smartsheet Use Cases at Public Health

- Automated Update Requests
- Automated workflow approvals
- Content Editing and Management
- Coordination of vaccine and COVID-related events and calendar publishing
- Data Collection/Surveys
- Databases (e.g. Toxic Free Kids, Vaccine Ops Tracking)
- Document Collaboration with version control
- Document Generation
- Equipment Reservations
- Grant Deliverables
- Inspection report collection and tracking
- Legislative Tracking
- Order Forms and ticket tracking
- Performance System data tracking and calculations
- Project Management
- Real Time Dashboards and data visualization
- Reporting Capabilities
- Speaker Events and Coordination

# Agencies who use Smartsheet

- Oregon Health Authority - Public Health Division/Covid Recovery and Response Unit
- Oregon Health Authority - All Other Divisions
- Oregon Department of Human Services (DHS)
- Oregon Department of Administrative Services (DAS) IT
- Oregon Housing and Community Services (HCS)
- Office of Information Services (OIS)
- Department of Corrections (DOC)
- Department of Justice (DOJ)
- Oregon Employment Department (OED)
- Oregon Department of Education (ODE)
- Oregon Lottery
- Oregon Youth Authority (OYA)
- Department of Environmental Quality (DEQ)

# Smartsheet University



# Smartsheet Template Set Example: Project Tracking and Rollup

## How Does It Work?

## What's Included?

Template Set - Project Tracking and Rollip

**Project Tracking and Rollup Dashboard**

Summarize key project details.

**Project Plan Sheet**

Track all of the tasks and deadlines for your project.

**Project Milestones Report**

Track critical project milestones.

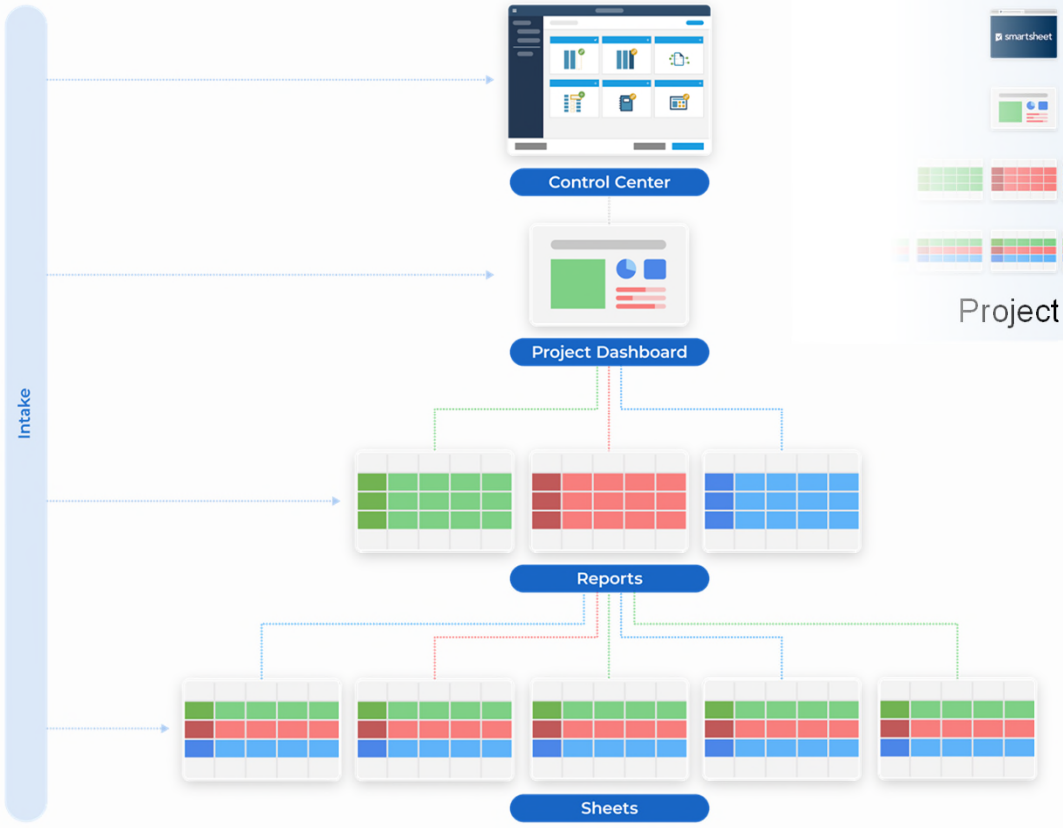
**At Risk Tasks Report**

Track at risk items across your project.

**Task Rollup Report**

Track tasks across your project.

# Enabling Control at Scale

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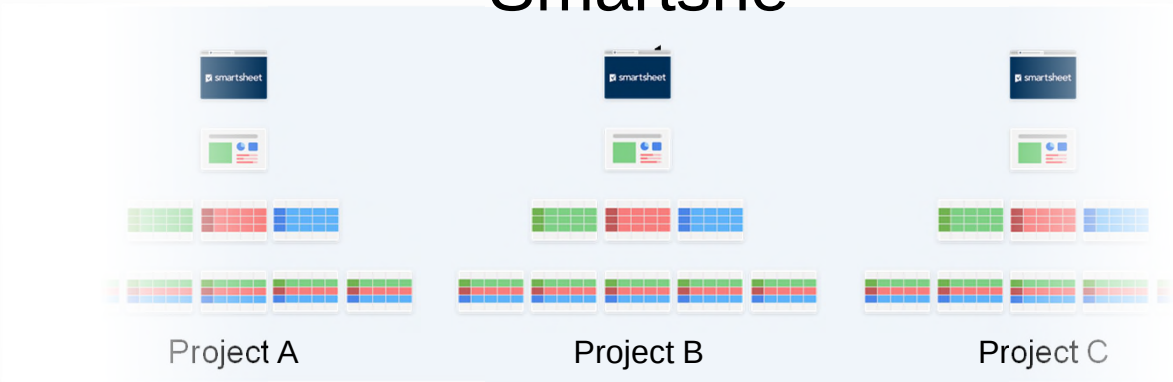
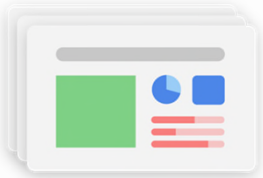


Portfolio Dashboards & Reports

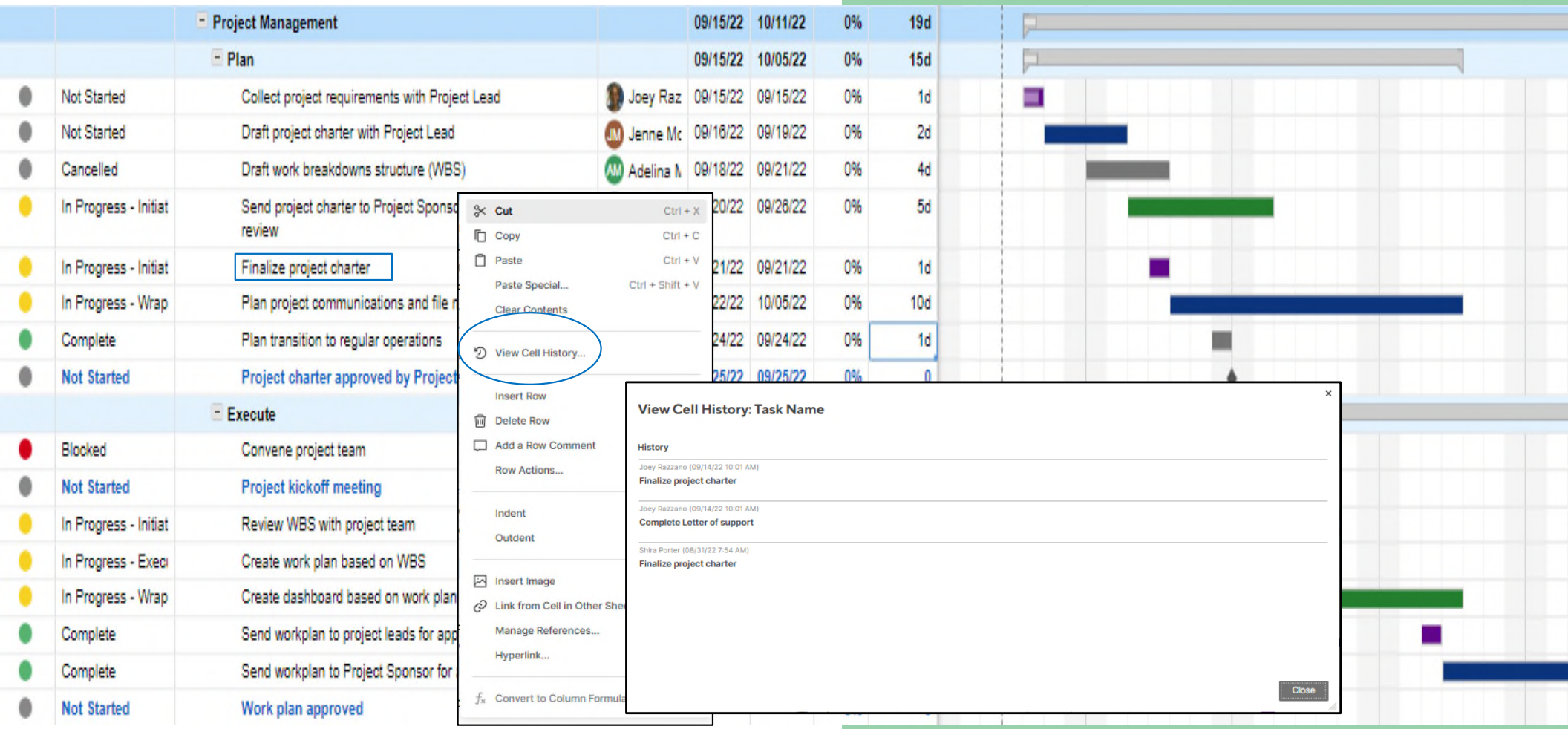
Flexible, Easy to use

Standards & control

Oregon Health Authority

# Unique Features

Audit and track changes at the cell and sheet level



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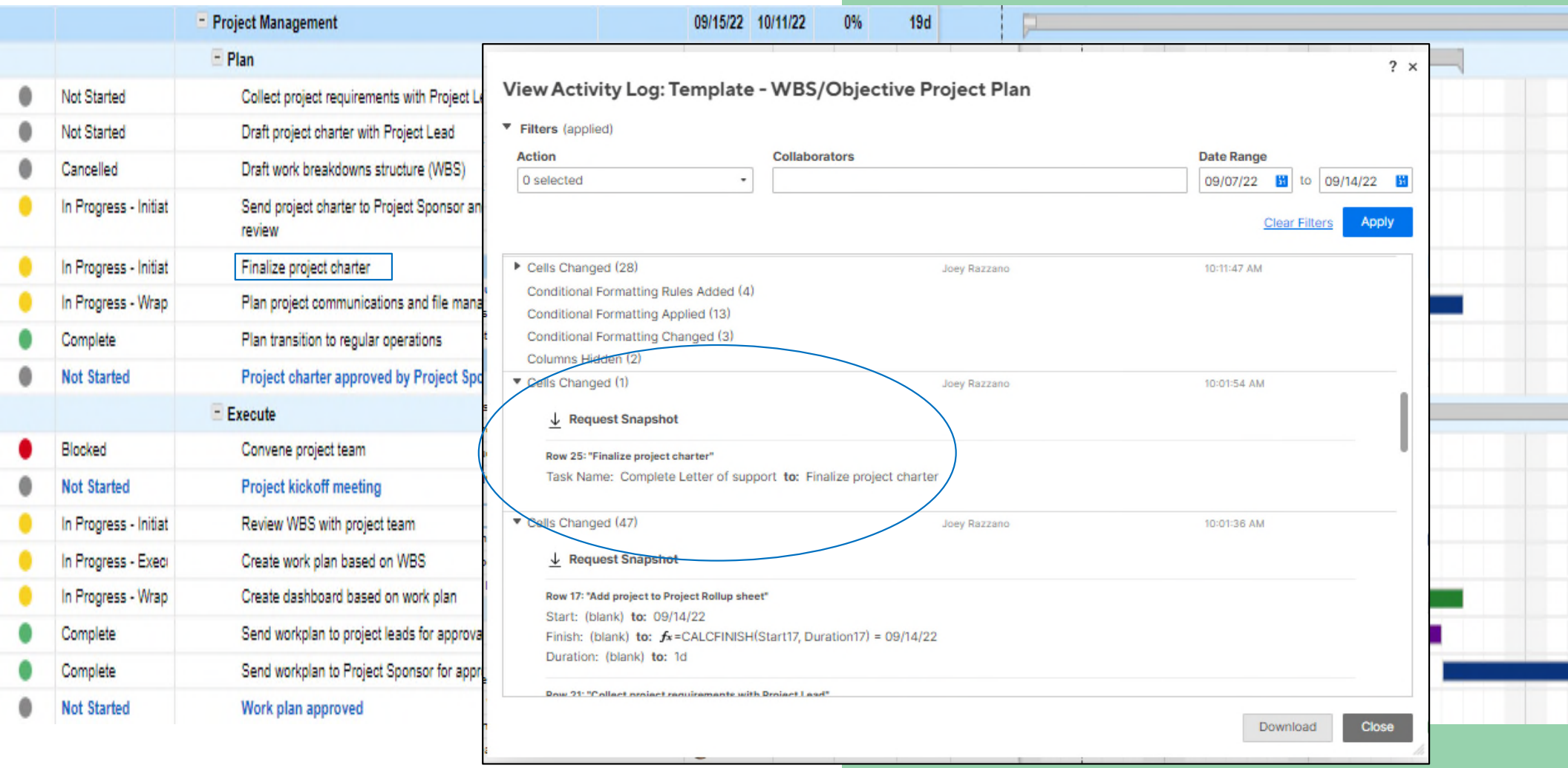
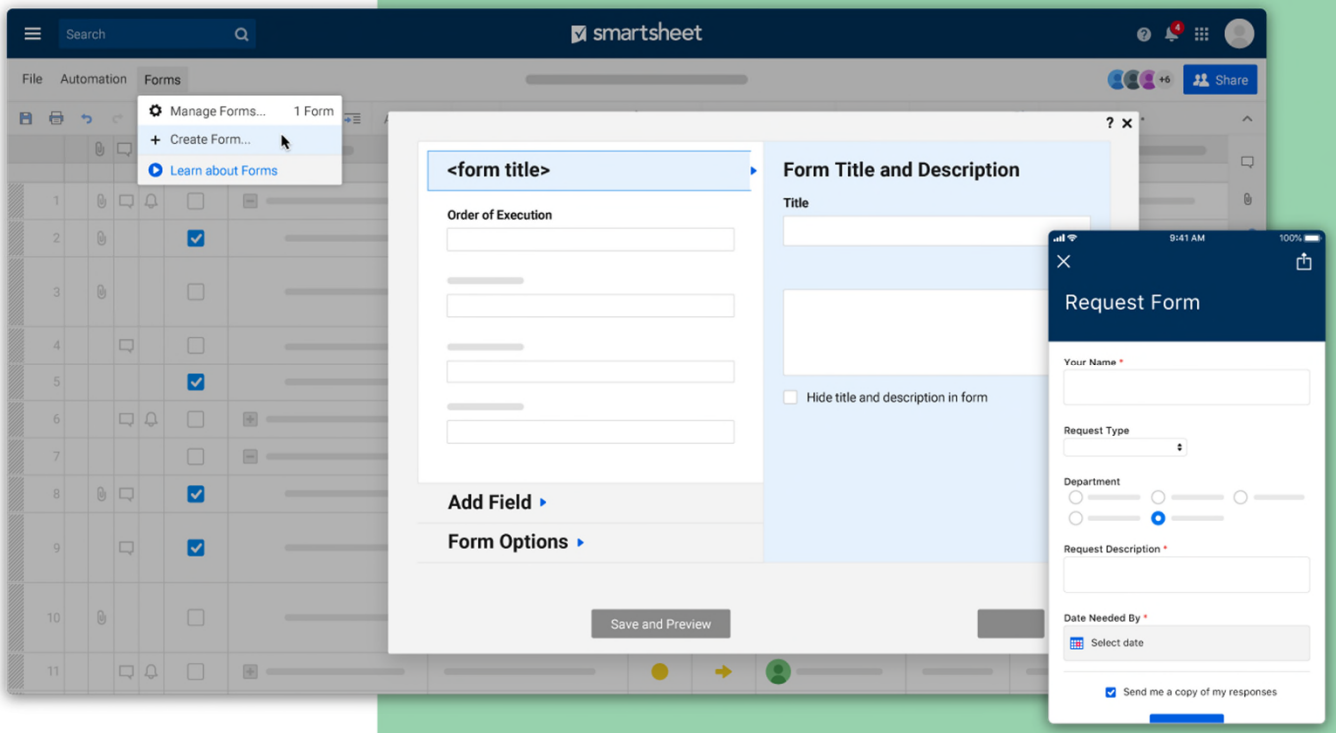


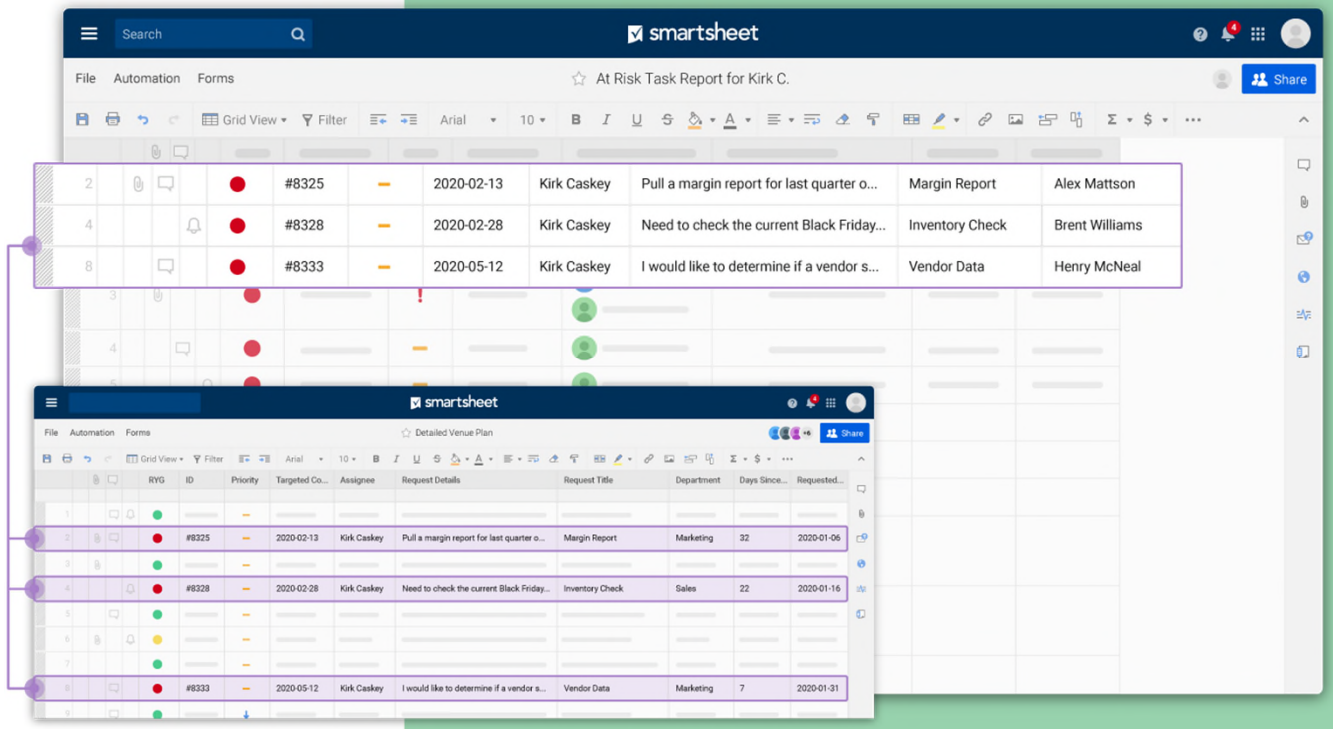
# Forms

Easily create and customize forms to collect data from anyone on any device, and save data in a structured format.



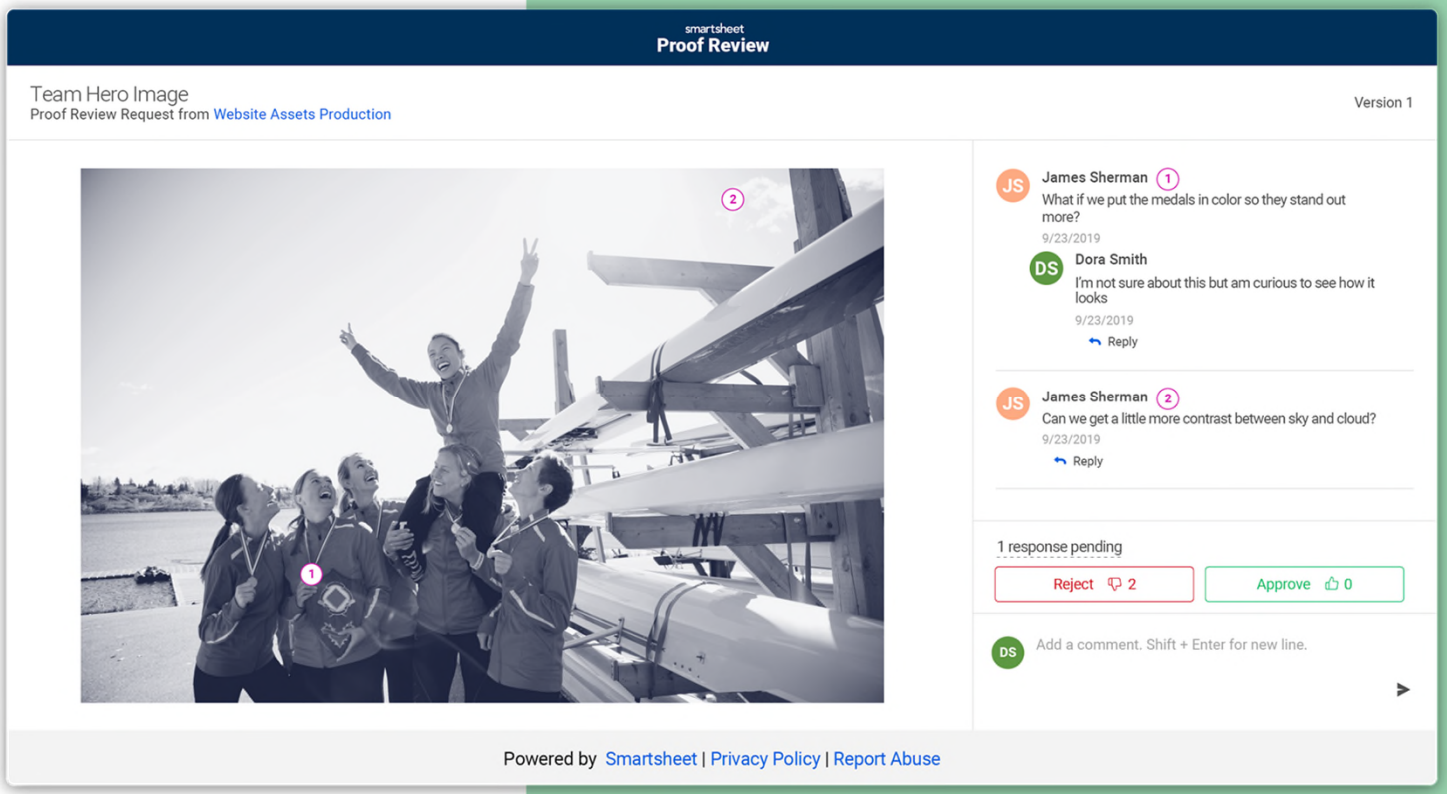
# Reports

Reports are a powerful way to consolidate key information from multiple sheets into a single overview.



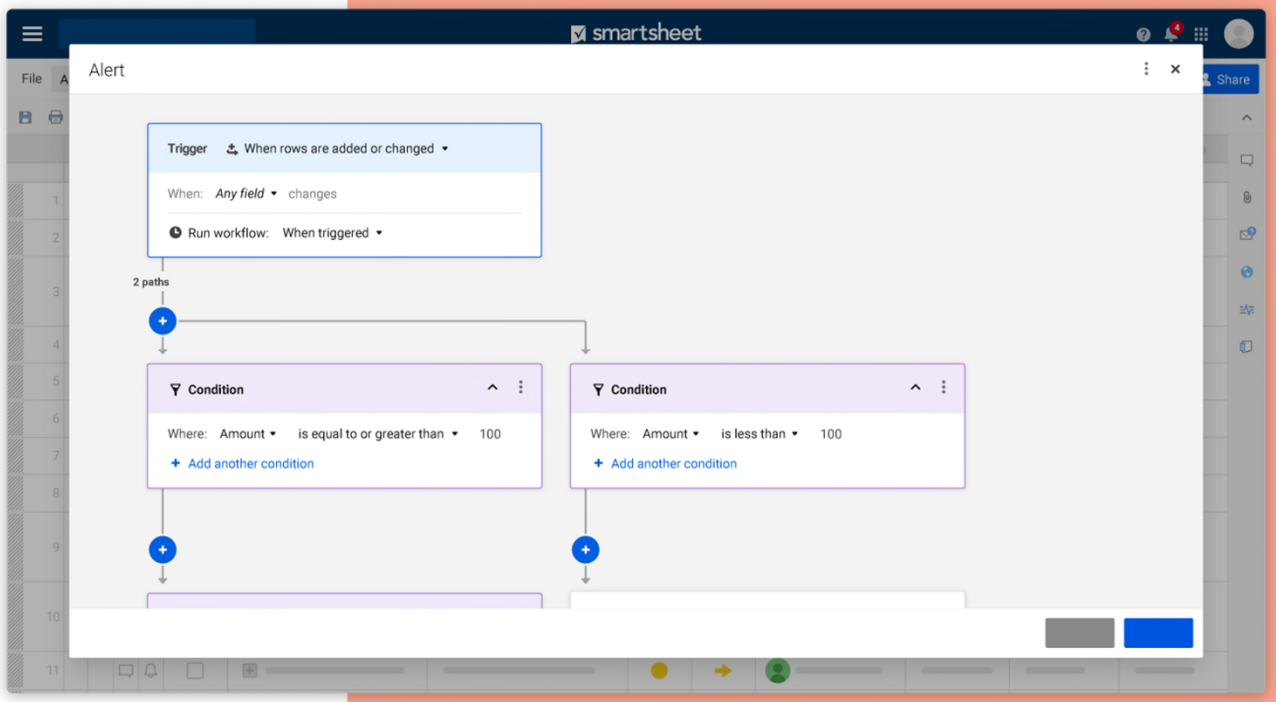
# Content collaboration

Plan, manage, and review content production in Smartsheet to finalize more assets faster.



# Automated Workflows

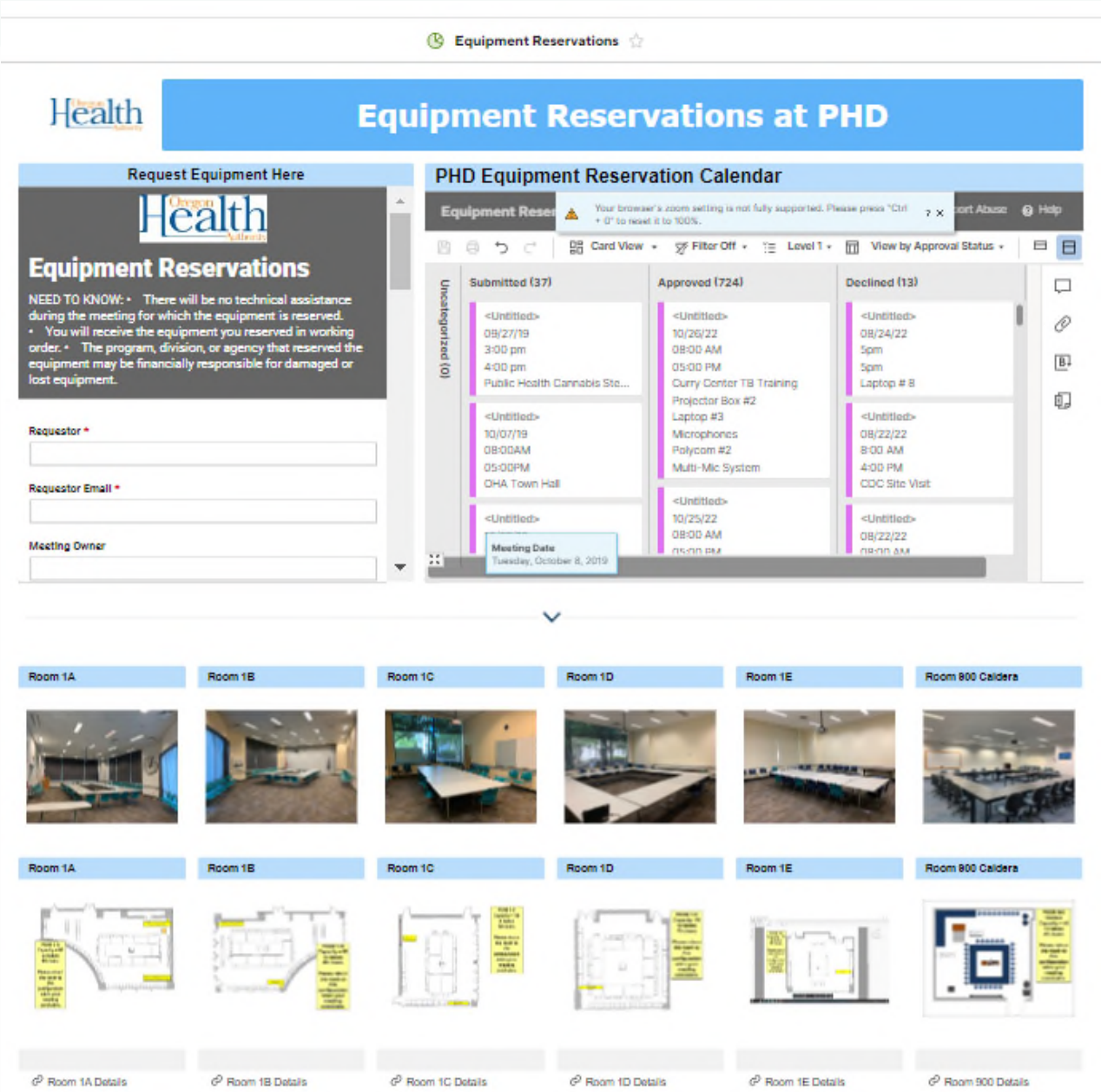
Save time and reduce repetitive, manual work with automated workflows.



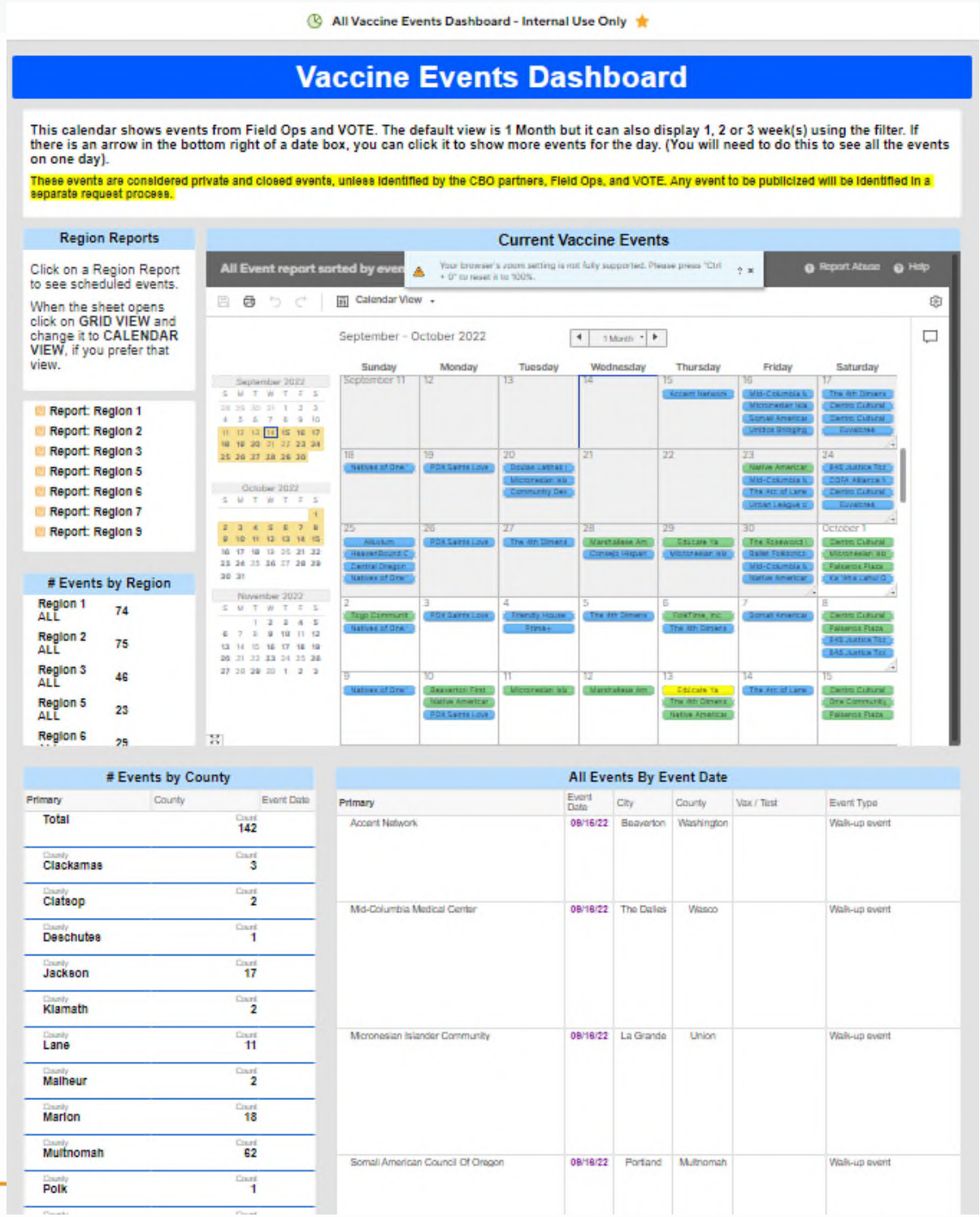

- Deadline notifications
- Status updates
- Approval requests
- Time based workflows
- Multi-step workflows
- Recurring workflows
- Conditional reminders

# Demonstration of Smartsheet

# Demonstration of Smartsheet: Equipment Reservation System at the Public Service Office Building



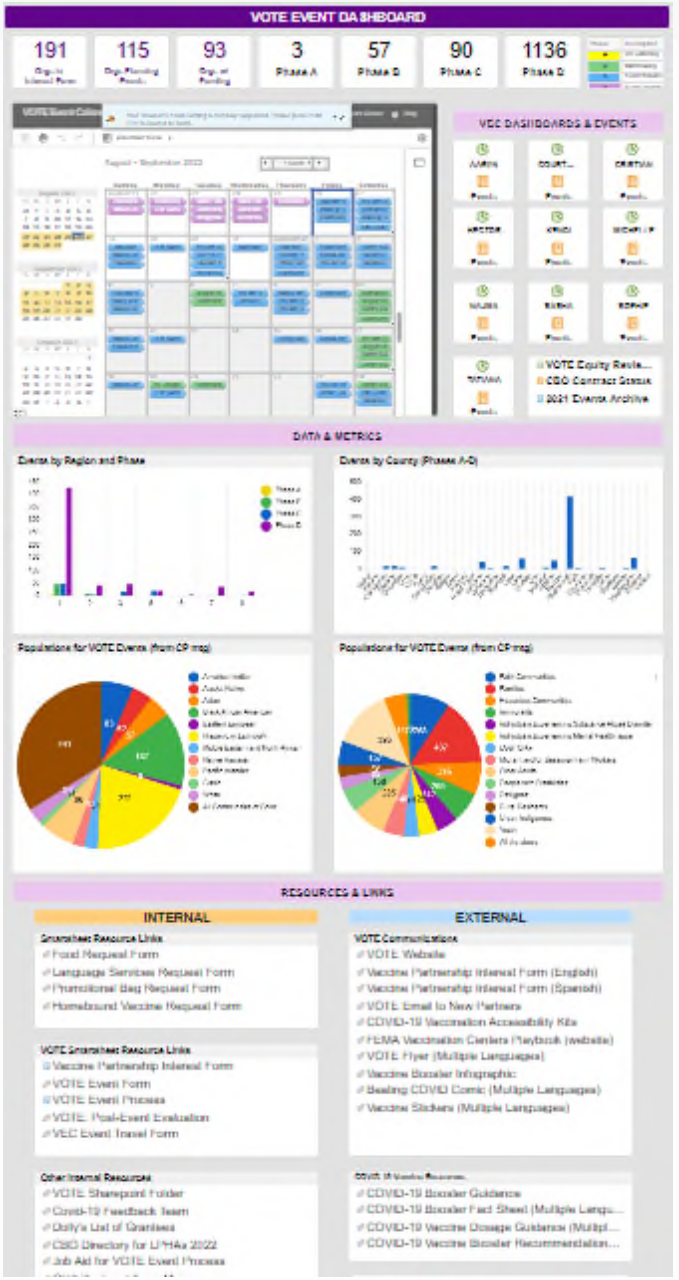
# Demonstration of Smartsheet: Food Box Requests at Vaccine Events with C/S Survey



# Oregon State Smartsheet User Group Team (OSMART)

- Monthly Training SMARTSHEET SESSIONS/Open Office Hours
- If you'd like to join the Oregon State Smartsheet User Group Team (OSMART), the team code to join is: **ewek1dr**
- Each agency has their own channel
- Peer to peer channel to share knowledge
- Past Smartsheet Sessions Presentations and meeting recordings available in document libraries
- Here is the SharePoint site for OSMART
- Contact Joey Razzano to add members and/or channel to Team

# Questions/Q&A




- CONTACT INFO:
- Joey Razzano
- Joey.w.razzano@oha.Oregon.gov
- 503-421-0960

# Business Need (Today)

- Public Health/CRRU needs to collaborate with outside partners using an Equity-based lens:
  - Local Public Health Authorities (33)
  - Other State Agencies
  - Community Based Organizations (200+)
- COVID response required speed and capacity not offered by traditional OIS support
  - Low code, no code based
  - Real-time reporting
  - Once license can support multiple agencies

# Smartsheet Government Solutions

- Break Down Silos Across Departments
  - Fast user adoption and seamless, secure sharing allows for organizations to easily collaborate across departments and drive the best results for their constituents.
- Simplify Long-Term Strategic Planning
  - Simplify strategic planning and goal setting by aligning timelines, and then seamlessly tracking tasks and budget for your strategies.
- Streamline Operations and Asset Management
  - Use data collection forms, barcode scanning, and GPS location tags to track your assets in real-time across departments and regions.
- Grant Management
  - Seamlessly track money spent and summarize expenditures along with program progress on dashboards in order to keep stakeholders informed.
- Field Coordination
  - Keep field teams focused on priority requests and give them the mobile tools required to provide seamless real-time status.