

smartsheet ENGAGE

Solution Certification
Preparation



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Preparation

“Competing at the highest level is not about winning. It’s about preparation, courage, understanding and nurturing your people and heart. Winning is the result.”

- Joe Torre

Objectives

In this session, we will explore:

- **Exam format**
- **Key features & functionality assessed**
- **Check-in & getting started**
- **Exam scoring and feedback**

Solution Certification

Exam Overview

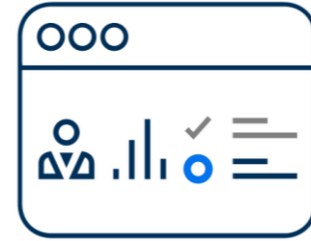


What is Solution Certification?

- **Advanced Certification**
- **Certifying individuals who can create a solution with Smartsheet**
 - **Plan**
 - **Capture**
 - **Manage**
 - **Automate**
 - **Report on work at scale**

Solution Certification

Overview



**Given a set of
business pain
points**

**Inherit a set of
project
requirements**

**Create a solution to meet the
project requirements**

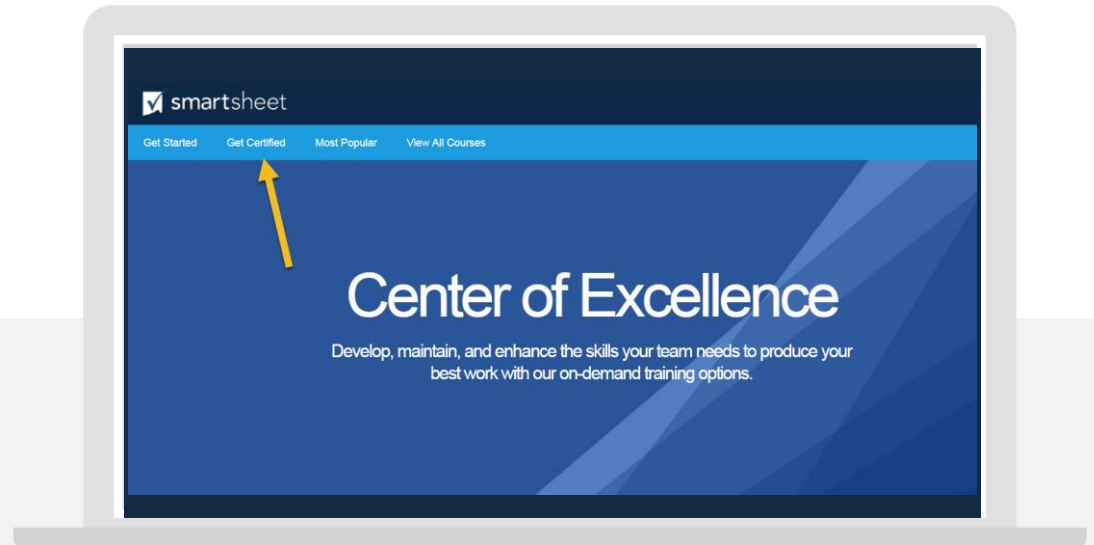
Solution Certification Process Overview



Exam Format

Overview

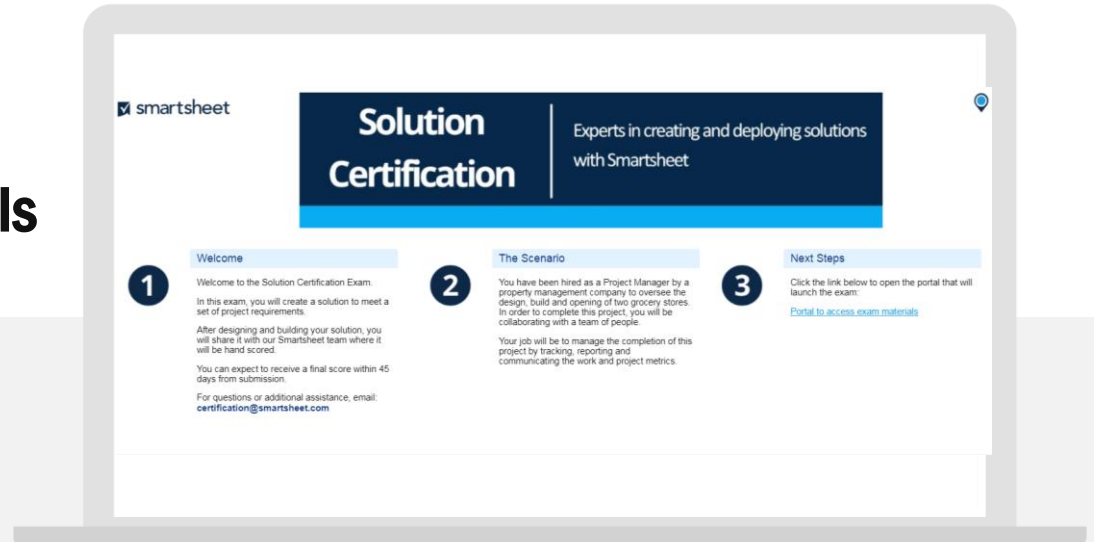
- **Accessed via Center of Excellence**
- **Open Book**



Solution Certification

Process

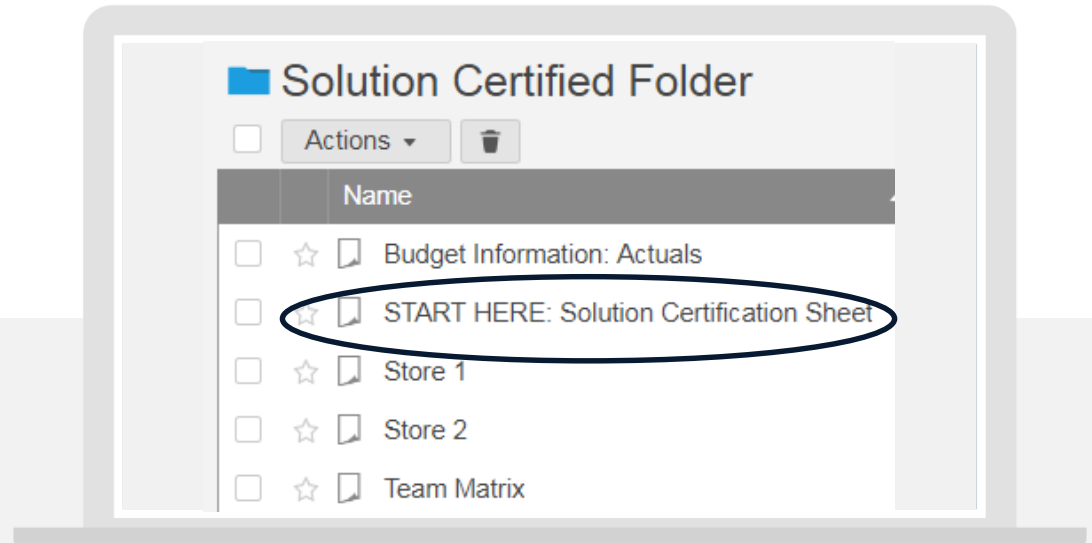
Access the Solution Certification portals



Solution Certification

Process

**Download the Solution
Certified Folder**



When Building the Solution

Key reminders:

- **Starting sheets will be missing information.**
- **Add, change or format data to develop your solution.**
- **If something is not explicitly stated, you will need to make a decision about the best way to build the solution.**



Solution Certification

Expectations and Functionality Tested

Test Specifications

Smartsheet items & features to include

- **Solution must contain:**
 - **Dashboard(s)**
 - **Report(s)**
 - **Master roll-up sheet**
 - **Project sheets**
 - **Formulas**



Key Features & Functionality

Tested Items

ACTIVITY

1. Check the features you can apply confidently

2. Circle the features to review

Solution Certification Features Tested

- Transform a base sheet into a project sheet
- Create task relationships
- Establish milestones
- Formulas:
 - Variance
 - Automating at-risk columns
- Publish items (sheets, reports, dashboards)
- Build cell links between sheets
- Roll up information at a project level

Solution Certification

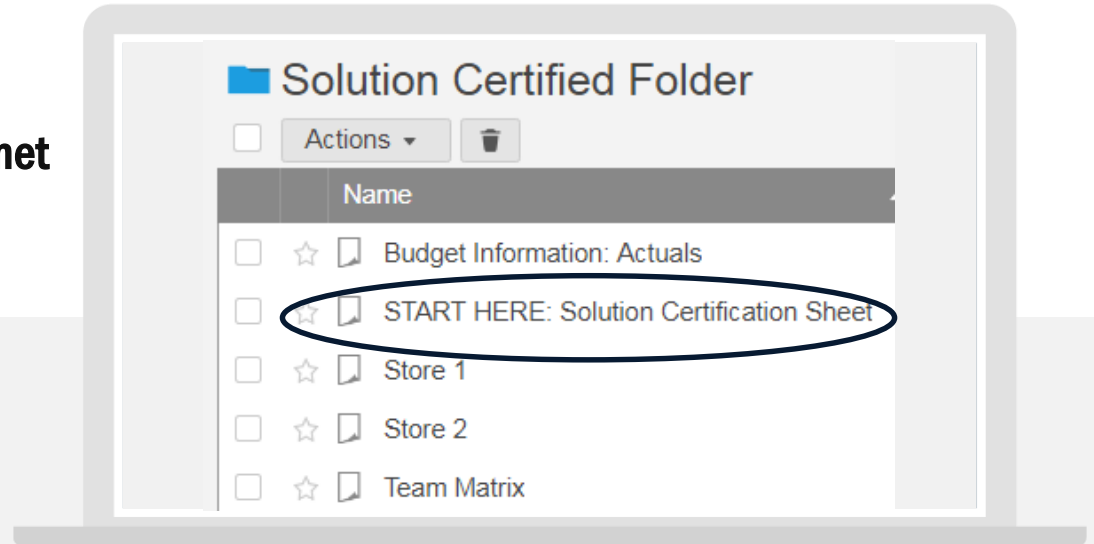
Submitting Your Exam

Status	Assigned To	Start Date	Due Date	Budget	Actuals	% DI
Complete	Elizabeth Bennet	07/31/17	08/01/17	\$5,000	\$3,755	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$10,000	\$9,278	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$5,000	\$5,315	
Complete	Elizabeth Bennet	08/07/17	08/11/17	\$5,000	\$4,714	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$27,808	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$26,779	
Complete	Roman Mars	08/14/17	08/21/17	\$65,000	\$68,280	
Complete	Roman Mars	08/21/17	09/01/17	\$65,000	\$67,310	
In Progress	Charlotte Lucas	09/04/17	09/08/17	\$75,000	\$73,000	
Not Started	William Darcy	09/11/17	09/22/17	\$70,000		

Submitting Your Exam

Explaining how you met the requirements

- **For each requirement, you will need to explain:**
 - 1. Action(s) taken & data entered**
 - 2. How the action(s) & data entered met the requirement**



Let's Practice: Examples

Advanced work management context

Question:

How did you track
schedule variance?

Answer:

Include

- **Action(s) taken & Data Entered**
- **Why/how actions and data met requirement**

Explanation Expectations

Advanced work management

Question:

How did you track
schedule variance?

Answer:

To track schedule variance, I:

Inserted an Actual Finish - date column type.

Then, I inserted a new symbol column called Schedule Variance and subtracted the Actual from the Planned Finish

<Insert actual formula>

Subtracting the Actual Finish Date from the Planned Finish date determines the variance

Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.

Explanation Expectations

Advanced work management

Question:

How did you track
schedule variance?

**Actions
taken &
Data
Entered**

Answer:

To track schedule variance, I:

Inserted an Actual Finish - date column type.

Then, I Inserted a new symbol column called Schedule Variance and subtracted the Actual from the Planned Finish

<Insert actual formula>

Why/How?

Subtracting the Actual Finish Date from the Planned Finish date determines the variance

Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.

Explanation Expectations

- **Step #3: Read the list of solution requirements below.**

Information placed in this column will be used to score your exam. For each project requirement in Step #3 (See YELLOW formatted cells below), write your explanation in this column. Each explanation must contain:

1. Actions you took in Smartsheet to meet the requirement.
2. Data you entered to meet the requirement.
3. Why/how the action(s) you took met the requirement.

- **To successfully manage the project, your solution must address the following requirements:**

- **Use the store sheets to:**

Manage the schedule by tracking the schedule variance.

Communicate at-risk tasks for the project.

Explanation Expectations

- To successfully manage the project, your solution must address the following requirements:

- Use the store sheets to:

Manage the schedule by tracking the schedule variance.

To track schedule variance, I:

1. Inserted an Actual Finish - date column type.
2. Inserted a new symbol column called Schedule Variance
3. Using a formula, I subtracted the Actual Finish date from the Planned Finish date.
<Insert actual formula>
4. Subtracting the Actual Finish Date from the Planned Finish date determines the variance
5. Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.

Let's Practice: Examples

Advanced work management context

Question:

How did you communicate at-risk tasks?

Answer:

- **Action(s) taken**
- **Data entered**
- **Why/how actions and data met requirement**

Let's Practice: Examples

Advanced work management context

Question:

How did you communicate at-risk tasks?

**Actions
taken &
Data
entered**

Why/ How?

Answer:

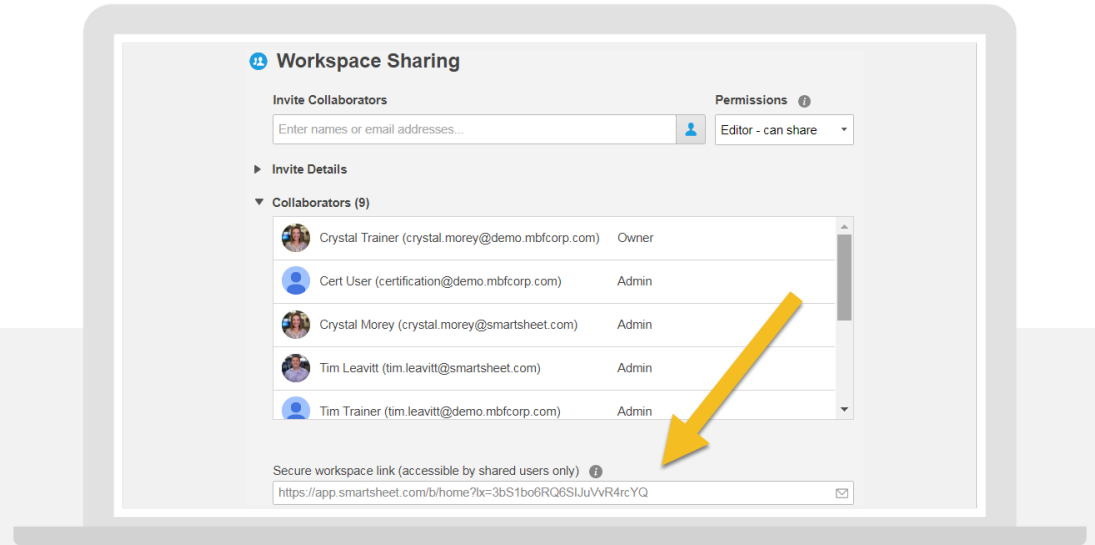
To communicate at-risk tasks, I:

- **Used a nested if formula to automate the At-Risk flag with the following formula**
<Insert Formula>
- **If any one of the Schedule, Budget or Work Variance columns are “Down”, the At-Risk flag will be raised by the previously stated formula.**
- **By automating these columns, a collaborator can come into the sheet and view any of the at-risk tasks.**

Final Steps

Before you end the exam

1. Share your workspace
2. Submit via a form
3. Copy of workspace created for scoring



What Happens Next?

Final steps: feedback

- **Alert sent from Smartsheet within 45 days**
- **Pass/Fail**

[FINAL Scoring sheet 8-8](#)
Changes since 8/14/18 9:54 PM

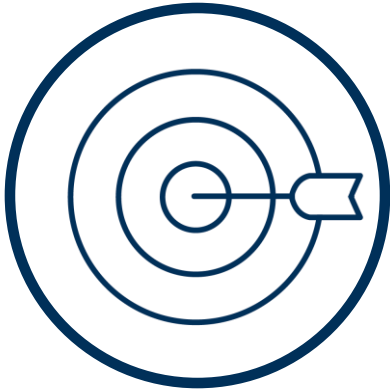
1 row changed

1 row added or updated (shown in **yellow**)

Row 10

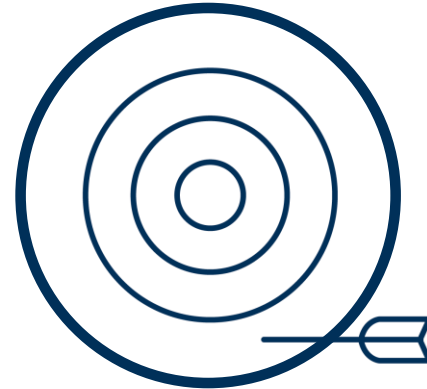
Pass/Fail:	Passed
Level Obtained:	Distinguished
Requirement #1	Manage the budget for each store by tracking and determining the variance bet
Score #1	100%

What happens when I pass?



Pass:

- Post certificate to LinkedIn
- Post picture of yourself and certificate with #SmartsheetCertified
- Badge on Community
- Recognition at ENGAGE



Fail:

- Option to retake
- Certification team will follow up with next steps

Solution Certification

Coming Prepared

Status	Assigned To	Start Date	Due Date	Budget	Actuals	% DI
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Complete	Elizabeth Bennet	08/01/17	08/04/17	\$10,000	\$9,278	
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Certification: Know Before You Go!

Know Before You Go!

ENGAGE '18

smartsheet certification

PRODUCT CERTIFIED

smartsheet

20 18

[CLICK HERE to View Study Guide!](#)

Exam Date & Time

SOLUTION CERTIFIED

smartsheet

20 18

[CLICK HERE to View Study Guide!](#)

Exam Date & Time

Day of Test

Come prepared

What to bring:

- Personal laptop & Power cord
- Identification
- Headphones or earbuds

What not to bring:

- **Cell phone and camera devices**

Test-Taking Tips

Ahead of the exam:

- Attend the Advanced class
- Eat lunch
- Review the list of features tested
- Become familiar with Smartsheet learning resources

During Exam:

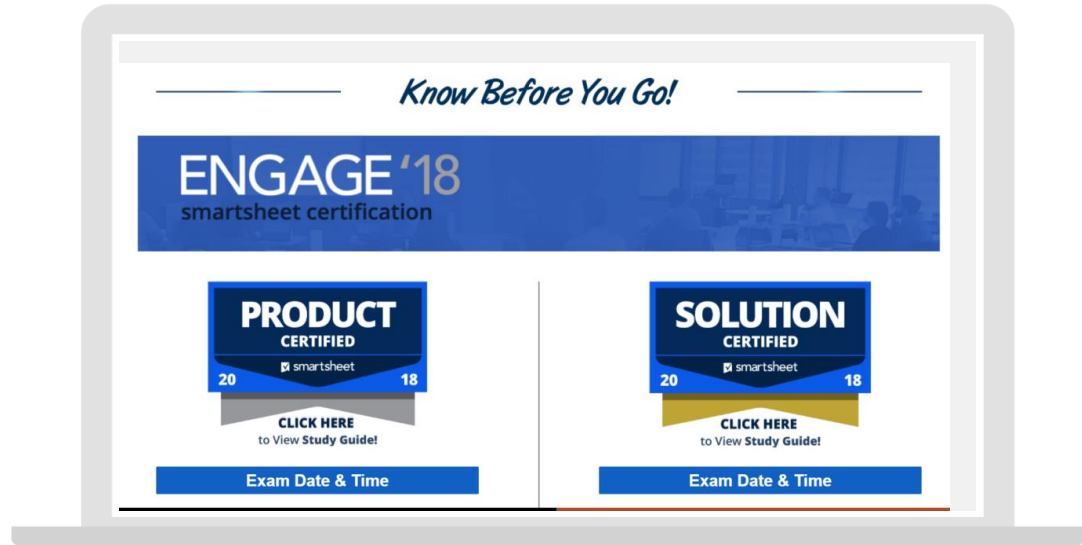
- **Pace yourself**
- **Attempt every requirement**



Check in Process

Getting into the exam

- **Lunch at 12**
- **Check-in at 12:30**
- **Exam Starts at 1**
- **Hyatt 3rd floor**



A person is shown from the side, writing in a notebook with a pen. The scene is overlaid with a semi-transparent blue filter. The notebook is open, and the person's hand is visible holding the pen over the page.

#SmartsheetCertified

Why is this valuable to you?

Why are you becoming #SmartsheetCertified

“I am excited to become certified because . . .”

“By becoming certified, I hope to . . .”



I Became #Smartsheet Certified...

“This certification is going to help me move forward with a promotion that I just earned which will be tied to developing workflows, procedures & processes, and project management on a much higher level.”



smartsheet
ENGAGE / Q&A

#SmartsheetENGAGE



See You Tomorrow

Check in begins at 12:30pm

Test start promptly at 1:00pm

Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Certification booth on the second floor to Snap & Share your #SmartsheetCertified story
- Visit the Innovation Center for hands-on learning, support, services, swag, and more