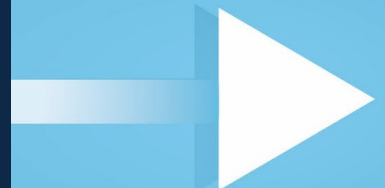


From Chaos to Control

How Smartsheet Streamlines Processes



Agenda

1

**Introduction to
Smartsheet**

2

**HDR Case
Study**

3

**Application to
Solid Waste**

4

**Question &
Answer**



About Me

Harrison Dewhurst

Mechanical EIT



HDR Tenure ~ 2 years



Quinnipiac University



University of Florida






1

Introduction to Smartsheet



What is Smartsheet?



- Project Management  Gantt
- Collaboration  Workspace
- Automation  Task List
- Dashboarding  Dashboard
- Forms / Surveys  Form

Project Management

smartsheet

File Automation Forms Connections Dynamic View **Example Gantt Chart for Presentation** ☆ Share

Grid View Filter Arial 10 B I U

	Task Name	Duration	Start	Finish	Predecesso...	Assigned To	Allocation %
1	Notice-to-Proceed	~0	02/12/24	02/12/24			
2	Project Kickoff Meeting	~0	03/19/24	03/19/24			
3	Receive County Template Documents	13d	04/12/24	04/30/24			
4	Submit Draft Term Sheet/RFQ for Client Review	30d	04/22/24	05/31/24			
5	Submit Draft Term Sheet/RFQ Documents	15d	04/22/24	05/10/24			
6	Receive Comments	1d	05/24/24	05/24/24			
7	Finalize Comments	5d	05/27/24	05/31/24	6		
8	Finalize Term Sheet/RFQ and Submit to Procurement	10d	06/03/24	06/14/24			
9	Submit Final Term Sheet/RFQ	1d	06/03/24	06/03/24			
10	Receive Comments	4d	06/04/24	06/07/24	9		
11	Finalize Comments	5d	06/10/24	06/14/24			
12	Last Day for Interested Firms to Submit Questions on RFQ	10d	07/16/24	07/29/24			
13	Procurement Receives Statement of Qualifications from Respondents	60d	07/16/24	10/07/24			
14	Procurement Distributes to Evaluation Committee	11d	10/08/24	10/22/24	13		
15	Review and Score	11d	10/08/24	10/22/24	13		
16	Evaluation Committee Review and Recommendations to Procurement	1d	10/23/24	10/23/24	15		

Collaboration

Example for Presentation

[Open in Browse](#)

+ Create

 Dashboard

 Task List

 Report



smartsheet

File Automation Forms Connections Dynamic View

 Things to do 

    |  Card View  Filter  All Levels  View by Status 

Uncategorized (0)

Not Started (3)

Fix all Annual Report Data

07/12/24

Done

 john.liebler@hdrinc.com

Create graphs for Annual Report

Done

 harrison.dewhurst@hdr...

Practice Presentation

07/03/24

Done

 harrison.dewhurst@hdr...



In Progress (2)

Quarterly Report

07/02/24

Done

 harrison.dewhurst@hdr...

Create Presentation Slides

06/28/24

Done

 harrison.dewhurst@hdr...



Complete (1)

Punchlist Items

06/28/24

Done

 harrison.dewhurst@hdr...



[+ Add Lane](#)

Automation

Create a workflow from a template

Pick a workflow template that you can modify as needed.

Popular Templates



Alert someone when specified criteria are met



Remind someone on a specific date



Move a row to another sheet when specified criteria are met



Request an update every week

Notifications and Reminders



Alert someone when specified criteria are met



Remind someone on a specific date



Alert someone when anything changes



Send a message-only alert when specified criteria are met



Alert someone when a row is deleted



Alert someone when sharing changes

Test for Presentation

🔔 Alert someone when anything changes

An alert is sent when the following changes occur:

- Rows are added, changed, or removed
- Sheet comments and attachments are added, changed, or removed
- Row comments and attachments are added, changed, or removed
- This sheet is shared

📌 Try Automated Workflows

⚙️ Run workflow: When triggered ▾

🔔 Alert someone

➕ Send to specific people ▾

harrison.dewhurst@hdrinc.com

[Customize message](#)

✉️ Send from Smartsheet Automation



Dashboarding

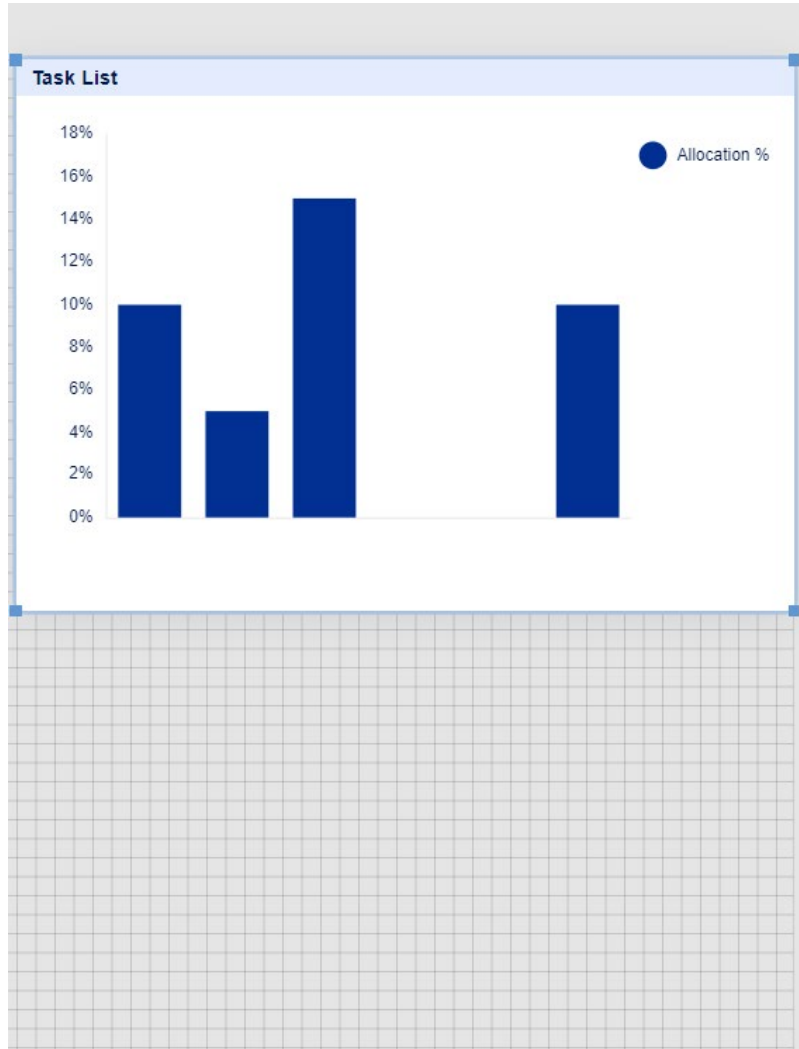


Chart Widget

Data & Chart Type

Data Source

Task List Edit

Columns Included ⓘ

All columns X

Use column names as category labels

Use first column as series labels

Switch rows & columns

Chart Type

Column

Title >

Horizontal Axis >









Vertical Axis >

Series >

Legend >

Widget Behavior >

Add Widget ✕

-  **Metric**
Display key cell values from a sheet
-  **Chart**
Create a meaningful chart from a sheet or report
-  **Shortcut**
Link to commonly accessed files, URLs, and Smartsheet items
-  **Report**
Display a report on the dashboard with optional Gantt View
-  **Title**
Add a title to your dashboard
-  **Rich Text**
Enter richly formatted text for updates or instructions
-  **Web Content**
Add content to your dashboard from external sources
-  **Image**
Add a company logo or any other image to your dashboard

Data Collection

← Task List

Form Settings

Active Open Form Share Form Save

Fields

Remove All Add All

Done


+ New Field

Form Elements

H Heading/Description

≡ Divider

📎 File Upload



Task List

Task Name

Due Date

Assigned To

Status

Comments

End Date

Allocation %

Form Title

Title

B I U A ✖ ≡

Task List

Description

B I U A ✖ ≡ ≡ ≡ 🔗

Do not show title and description

2

**HDR Case
Study**



Before Smartsheet



Struggle of versioning across many documents



Pen to paper punchlisting with future uploads



Formatting photos in excel



Manually calculating metrics for reporting



Inefficient collaboration between parties

Item	Firm	Description	Recommendation	Priority	Status	Location	Scheduled Completion Date
0722.42	HDR	Steam vent line north of the TG enclosure is blowing steam directly onto steel structural members and piping/insulation, east of the condensate storage tank	Repair damage to structural steel and affected pipe insulation/lagging	B	Open	Condensate Storage Tank Area	December 14, 2022
0722.43	HDR	Steel guard has been removed off the east wall on the south exit to the ash house	Reinstall steel guard	B	Open	Ash House	December 14, 2022
0722.44	HDR	Door next to south exit of the ash house is completely deteriorated and not operational	Replace door and secure door closed	B	Open	Ash House	December 14, 2022
0622.01	HDR	Continuous blow down tank (CBD2) steam leak, between economizer Nos. 1 and 2, EL. 88	Repair leak	B	Open	Unit 2	September 14, 2022
0622.02	HDR	Unit 1 incline ash handling screw from SDA and baghouse back to the discharger has deteriorated at transition, EL. 61	Replace/Repair deteriorated section at connection	C	Open	Unit 1	October 14, 2022
0622.03	HDR	Boiler drain tank isolation gate valve leaking, southeast of Unit 1 SDA, ground floor	Repair leak	C	Open	Unit 1	January 14, 2023 Rescheduled from Oct 14, 2022 to Jan 14, 2023 Outage required for completion

1023.36

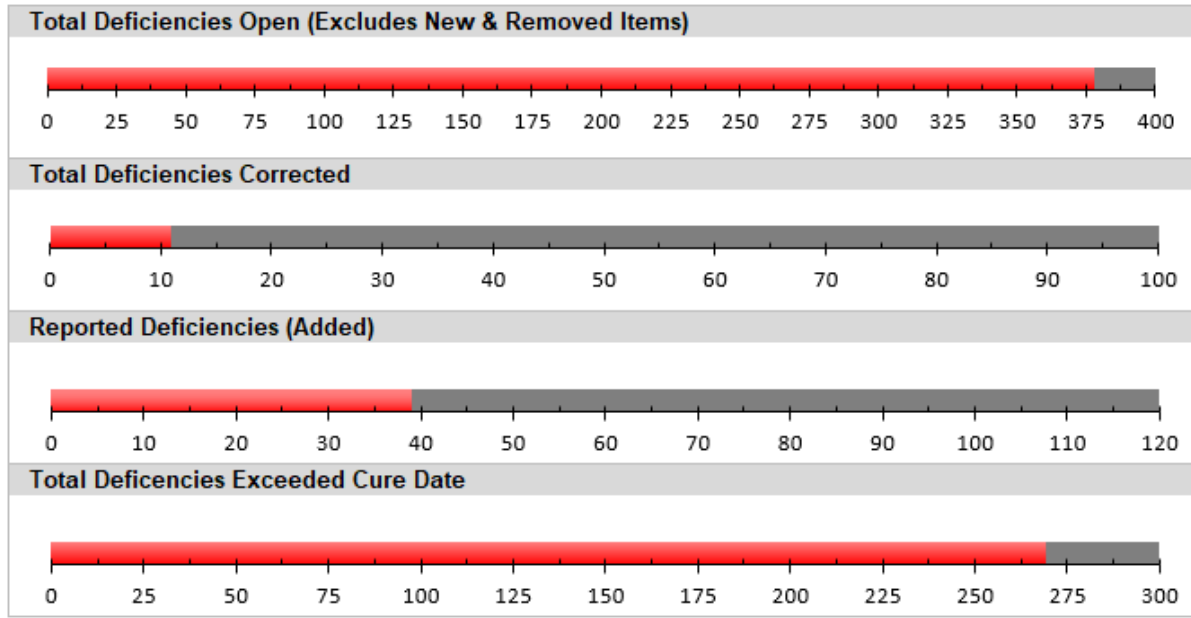


Open

1023.37



Open



Total Open Deficiencies (Excludes New Items)

Range 500
Count 378 *Total deficiencies corrected has been subtracted from this*

Total Deficiencies Corrected

Range 100
Count 11

Total Deficiencies Added (HDR)

Range 120
Count 39 *This is for current quarter to date*

Total Deficiencies Exceed Cure Date

Range 300
Count 269

FY23	Reported				Items	Photos
	New Deficiencies	Completed Deficiencies	Agreed Upon Removal	Rescheduled		
Q1	Oct 2021	40	11	0	265	265
	Nov 2021					
	Dec 2021					
	Total	40	11	0		
Q2	Jan 2022				0	0
	Feb 2022					
	Mar 2022					
	Total	0	0	0		
Q3	Apr 2022				0	0
	May 2022					
	Jun 2022					
	Total	0	0	0		
Q4	Jul 2022				0	0
	Aug 2022					
	Sep 2022					
	Total	0	0	0		

After Smartsheet



Simplified data collection



Centralized cloud-based document for housing punchlist



Automated and real time data tracking



Easy collaboration between parties utilizing comments and attachments



Dashboarding for real time visual updates

Current Implementation

smartsheet

File Automation Forms Connections Dynamic View **Example for Presentation** ☆ Share

Grid View Filter Off Arial 10 B I U

	Item	Description	Recommended Corrective Action	Priority	Status	Area
686	0324.24	DC ground fault alarm activated on BOP2 Charger B, BOP2 switchgear room	Address ground fault alarm	B	Open	Turbine Enclosure – BOP2 EI
687	0324.25	Concrete floor worn and damaged, directly under Baghouse No. 2	Repair concrete floor	C	Open	APC Area - Project
688	0324.26	Air receiving tank support and structural steel underneath Baghouse No. 2 damaged	Repair equipment support and damaged structural steel	C	Open	APC Area - Project
689	0324.27	Conduit bent into walkway under slipstick, head knocking concern, under south Unit 4 Discharger	Replace conduit and properly mount	A	Open	Boiler Enclosure - Unit 4
690	0324.28	Hole in south side of north Unit 4 Discharger (incline section near the top)	Repair / patch hole in discharger	C	Open	Boiler Enclosure - Unit 4
691	0324.29	Missing grounding conductor across flex conduit, east side of Unit 2 FD fan	Add grounding conductor per NEC requirements.	C	Open	Boiler Enclosure - Unit 2
692	0324.31	Leak on the top of the city water tank on the west side	Repair leak atop the tank	B	Open	Water Treatment Area
693						

Automated Metrics / Fast Item Collection

	Today's Month	Today's Year	Today's Day (theoretically)
	6	2024	1
Current Open Deficiencies (Includes newly reported items)	361		
Current Open Deficiencies (Excludes newly reported items)	322		
Corrected Deficiencies	24		
Newly Reported Deficiencies	39		
Exceed Completion Date	295		
Pending Verification Items	17		
Remaining Priority A	48		
Remaining Priority B	42		
Remaining Priority C	232		
Newly Reported A	8		
Newly Reported B	8		
Newly Reported C	23		
Agreed Upon Removal	12		



```
=COUNTIFS({Punchlist - Agreed Upon Rem Range 2}, >=DATE([Column3]2, [Column2]2 - 1, 16), {Punchlist - Agreed Upon Rem Range 2}, <=DATE([Column3]2, [Column2]2, 19))
```

Fast Item Collection

smartsheet

Item Collection Sheet

Description

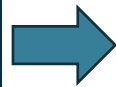
File Upload















Drag and drop files here or [browse files](#)

Send me a copy of my responses

Submit

Powered by smartsheet
[Privacy Notice](#) | [Report Abuse](#)



	Primary Column	Description
   		
		Motor fan cover missing, drive end of incline conveyor
		Safety covers missing from eddy current belt
		Electrical box being hung from underside of discharger unit 4
   		Safety cage missing from rotary soot blower SB-E-11 north side of unit 4 el 108
		Ammonia lance not in use after unit 4 major outage, south side of unit 4 el. 108'
		Sampling tubing not properly supported, south of unit 4 el. 108'
		Safety insulation blanket not replaced on unit 4 south side, el. 108'

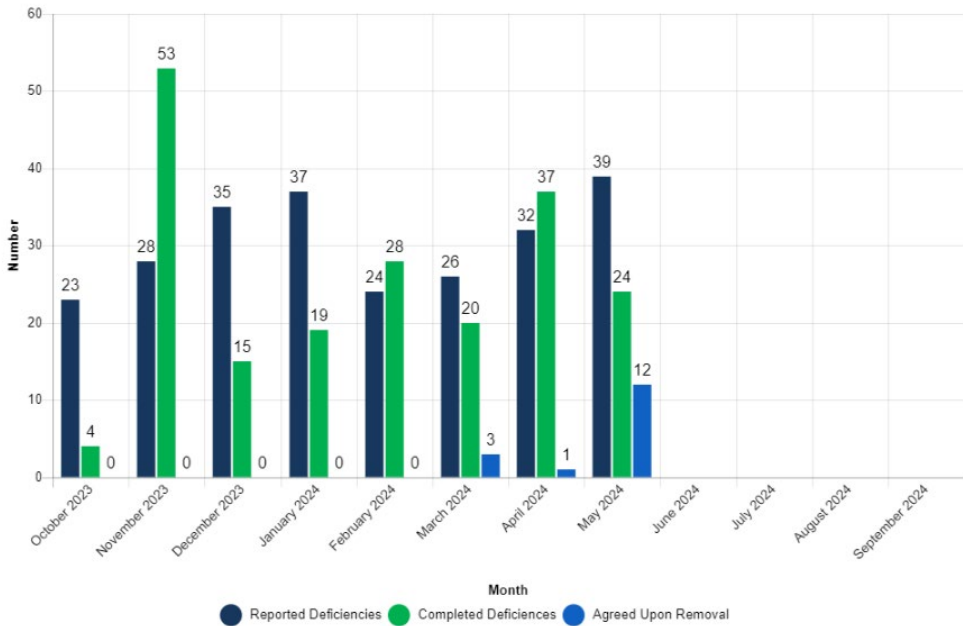
Dashboard

Total Open Deficiency Items
361

Items Reported Complete - Requiring Verification
17

Deficiency Items Exceeding Completion Date
295

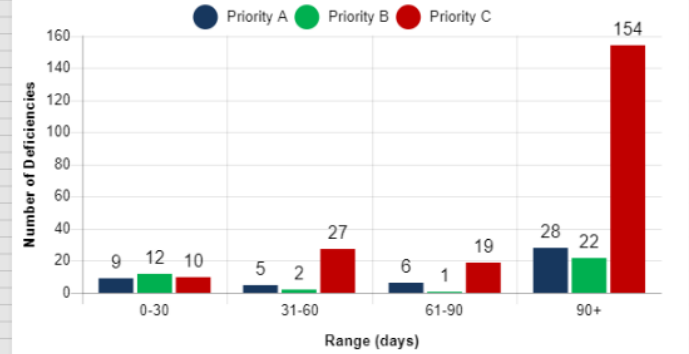
Monthly Punchlist Performance - Fiscal Year 2024



Punchlist Performance Summary

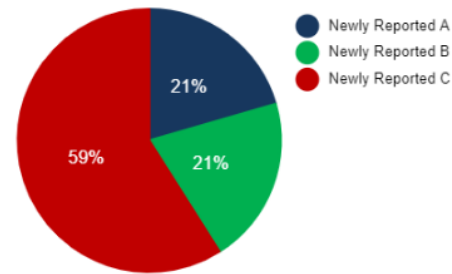
Month	Reported Deficiencies	Completed Deficiencies	Agreed Upon Removal
October 2023	23	4	0
November 2023	28	53	0
December 2023	35	15	0
January 2024	37	19	0
February 2024	24	28	0
March 2024	26	20	3
April 2024	32	37	1
May 2024	39	24	12
June 2024			
July 2024			
August 2024			
September 2024			
FY24 YTD Totals	244	200	16
FY23 Totals	493	283	4
FY22 Totals	423	415	20

Range of Expired Deficiencies



Priority Breakdown

Newly Reported Deficiency Priority Breakdown



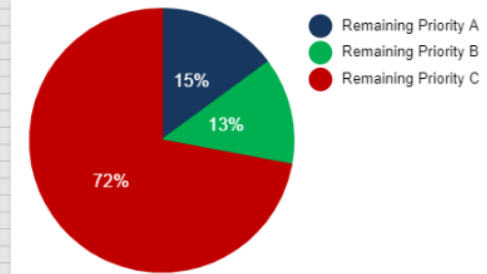
Remaining Deficiency Priority Classification

Priority A Items	48
Priority B Items	42
Priority C Items	232
Total Items	322

Newly Reported Deficiency Priority Classification

Priority A Items	8
Priority B Items	8
Priority C Items	23
Total Items	39

Remaining Deficiency Priority Breakdown



3

Application to Solid Waste



Solid Waste Applications



Project Management

*Construction and
Facility
Management*

*Equipment
Maintenance*



Operations Coordination

*Route
Optimization*

*Task
Assignments*



Waste Metrics Tracking



Environmental Impact Monitoring



Resource Management and Allocation

Summary



- ✓ **20 hours per month in time saved** with Smartsheet
- ✓ **Integrated Smartsheet** to many projects saving time
- ✓ **Expedited field data collection**
- ✓ **Increased collaboration** between multiple parties

Questions

