START HERE: Core App Skills Badge Exercise

	Activities
1	**Core App Skills Badge Feature Manipulation Exercise**
2	**Getting Started:**
6	**Sheet Manipulations**
7	**Organization**
8	Organize your sheet by establishing three levels of hierarchy. 1. The highest level of hierarchy should be the month 2. The middle level of hierarchy should be the individual weeks (weeks 1-4) 3. The lowest level of hierarchy should be the requests within a given week
9	**Sheet Formatting**
10	Choose a light background color and apply it to each of the "Week" parent rows.
11	Choose a darker background color and apply it to the parent row "Month".
12	Format the "% complete" column so the data is displayed as a percentage
13	Tag yourself in a comment, on row 3, using the @mention functionality
14	**Using Conditional Formatting:**
15	Turn the font in the "Creative Request" column red if it fulfills the following criteria: The "Delivery Date" is in the next 3 days AND the request is less than 90% complete
16	**Cell Linking**
17	On the "Monthly Tracking Sheet", you might notice that cell [Actual Cost]17 is empty. This amount is being tracked on a sheet called "Request Cost Tracking Sheet". Use cell linking to link in the amount from the cell, [Cost with Tax]8, on the "Request Cost Tracking Sheet" to the cell, [Actual Cost]17, on the "Monthly Tracking Sheet".
18	**Create and use Formulas:**
19	For each request on the "Monthly Tracking Sheet", calculate the "Profit", by determining the difference between the "Quoted Amount" and the "Actual Cost".
20	Use the SUM and CHILDREN functions to total the "Profit" for each week and the entire month
21	Use a nested-if formula to automate the RYG status balls in the "Status "column, depending on the "% Complete" for each request. If a request is less than 70% complete, turn the "Status" column into a "Red" status ball If a request is 70% or above and less than 100% complete, turn the "Status" column into a "Yellow" status ball If a request is 100% complete, turn the "Status" column into a "Green" status ball
22	**Create and use Filters**
23	Create a SINGLE FILTER, so that when it is applied, the filtered view should only display requests that meet the following criteria: The request is for a "Content edit or update" AND has a delivery date "in the next 30 days".
24	**Collaboration**
25	**Automation**

Additional Notes	Checklist
If using a single screen, it is recommended that you print this page of exercises.	
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Name the filter "Content edit or update"	☑

	Activities
26	Turn off the filter you created. Create an automation to notify the assigned designer that a new request has been assigned to them. They should receive the notification as soon as they are assigned.
27	Create an automation to send an update request to the Assigned Designer when a request is completed but an attachment has not been uploaded to the row (meaning the "Deliverable Attached" column is unchecked). Ask the Assigned Designer to attach the copy delivered to the customer in the message.
28	Create an automation to notify yourself every morning at 6 AM, of all the requests that require delivery for that day. Note: This should only be triggered on days where there are requests to be delivered.
29	Set yourself a row-level reminder for Request A (row 3 of the "Monthly Tracking Sheet"). The reminder should be set for a year from today, with the following message: "Update the year on all the deliverables for Request A."
30	Create a row-level update request for Request B (row 4 of the "Monthly Tracking Sheet"). Send it to yourself with the Subject "Update Request B", and the Message "Please update this request.".
31	Change the Automation Permissions to the unrestricted setting, allowing any email address to receive alerts
32	**Communicating your work**
33	**Reporting**
34	Create an at-risk report. Ensure it is organized in your "Core App Skills Badge Capstone Folder".
35	The report should reference the "Monthly Tracking Sheet" and should display requests with Status values of Red or Yellow with Delivery Dates in the next 3 days.
36	**Customizing a Dashboard**
37	You want the entire team to see the requests that are at-risk, but don't want to share them to the underlying sheet. To achieve this objective, you will put the report on a dashboard. Display the "At-Risk Requests" report on the dashboard titled "Overall Dashboard" (included in your "Core App Skills Badge Folder") using the report widget
38	In the "Overall Dashboard", change the bar chart on the right under the "Current Creative Requests" section (see image in attachments) into a donut chart. Add the legend on the right.

Additional Notes	Checklist
Name the automation: "Assigned to request" Send only the following columns: Creative Request Delivery Date Request Type Delivery Method	☑
Name the alert: "Attach Delivered Copy" Send only the following columns: Attachments Creative Request Deliverable Attached Delivery Date Request Request Type Assigned Designer	☑
Name the alert: "Today's Due Requests"	☑
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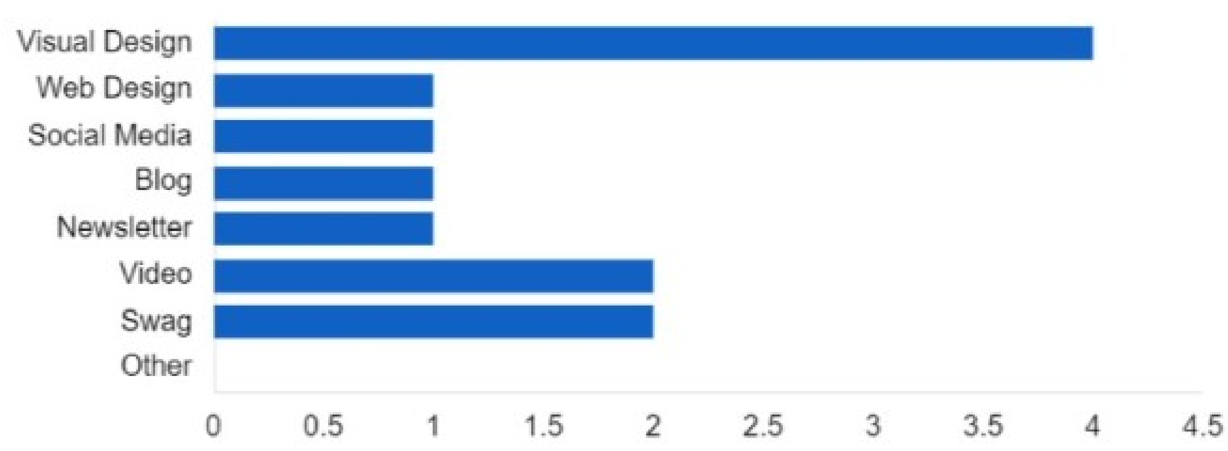
Include all the columns and set Delivery to "Send Now".	☑
	☑
Title your report: "At-Risk Requests"	☑
Include the following columns in your report: Status Delivery Date Assigned Designer % Complete Request Type	☑
Include a report widget title: "At-Risk Requests" Provide an interaction to open the underlying report upon a click.	☑
Title the chart widget: "Request Types"	☑

39 Activities



40 You want quick access to the current month's request delivery dates. To accomplish this, you will place a shortcut of the Calendar View of the "Monthly Tracking Sheet" on the "Overall Dashboard".

To do this:
First, return to the "Monthly Tracking Sheet" and change the view to Calendar View
While you're in the Calendar View, copy the URL address (located in the address bar)
Change the view back to Grid View
In the "Overall Dashboard", use the shortcut widget to add a link to the Calendar View

41 **Forms: Intaking new Ideas**

42 Now, exit the "Monthly Tracking Sheet" and the "Overall Dashboard" and open the sheet titled "Creative Request Intake Sheet" in the "Core App Skills Badge Capstone Folder". You will be using a form to intake new creative requests. Complete the following objectives:

43 Sheet edits:

44 Change the column properties of "Request Type" to allow the user to select only one of the following request types:

Visual Design
Web Design
Social Media
Blog
Newsletter
Video
Swag
Other

45 Add a system generated column to the far right of the sheet to automatically generate a created date when a submission is made.

46 Create and customize a form:

47 Create a form for the sheet. Enter the following description for the form:

"Thank you for your interest in having our team design and build your creative asset. Please use the form below to submit your creative request."

48 Remove the following fields from the form:

Additional Notes	Checklist
Title the shortcut: "Request Delivery Schedule"	☑
MAKE SURE YOU ARE ON THE "CREATIVE REQUEST INTAKE SHEET" FOR THIS SECTION AND NOT THE "MONTHLY TRACKING SHEET".	
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Name the column: "Submission Date"	☑
Title the form: "Creative Request Form"	☑

	Activities
49	Status
50	Assigned Designer
51	Make the following fields required:
52	Company Name
53	Client Email
54	Requested Due Date
55	Add Help Text
56	For the "Location or Email Address Field", add Help Text: "If the request is to be physically delivered, what is the address we should ship to? If the request is to be delivered via email, what is the email address we should send to?"
57	Insert a Default Value
58	For the "Request" field, insert a Default Value of "New Creative Request"
59	Hide this field on the form
60	Display the following fields with vertical radio buttons
61	Request Type
62	Edit the "Request Description" field
63	Extend the text box to 5 lines to allow for extended responses
64	Add a custom label
65	Edit the "Audience" field so it has the following custom label: "Who is the audience of this creative request?"
66	Add a new form element to:
67	Give a user the ability to upload a file within the form.
68	Change the settings to:
69	Create a custom confirmation message to be displayed on the confirmation page: "Thanks for submitting your creative request. Our team will be in contact within three business days."
70	Duplicate the form to create a second form
71	Replace the description of the duplicated form with the following: "We are excited to work with you to update or edit your existing creative content. Please use this form for content we have designed for you and now needs to receive minor edits or updates."
72	Set the default value for "Request" to "Content edit or update"
73	Keep this field hidden
74	Open both forms and submit a sample creative request for each form.

Additional Notes	Checklist
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Change the title of the duplicated form to "Content Edit or Update Request Form"	☑
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	Activities
75	**Answering Multiple Choice Questions**
76	Next, we will verify your completion of the Feature Manipulation Exercise by asking you to answer 20 multiple-choice questions (MCQs) based on the end state of your Smartsheet items. Note: You will only have 1 hour to answer the MCQs based on the above feature manipulation exercise.
77	Navigate back to the "Core App Skills Badge" in Smartsheet University and complete the MCQ-based "Core App Skills Badge Quiz" section.

Additional Notes	Checklist
MAKE SURE YOU HAVE COMPLETED ALL OF THE FEATURE MANIPULATION OBJECTIVES ABOVE BEFORE YOU MOVE ON TO THE MCQs AS YOU WILL ONLY HAVE 1 HOUR TO COMPLETE THEM	