smartsheet

Create your team portal activity

By the end of this activity, you will be able to:	Follow these steps to get the course activity assets
• Create a dashboard/portal • Summarize data • Insert and customize several widget types	1. Go to the Get the Course Activity Assets lesson on the left 2. Click the appropriate link for your region 3. Open the following folder: 04_Dashboards Course Assets > 14_Create Your Team Portal Activity

Create your team portal

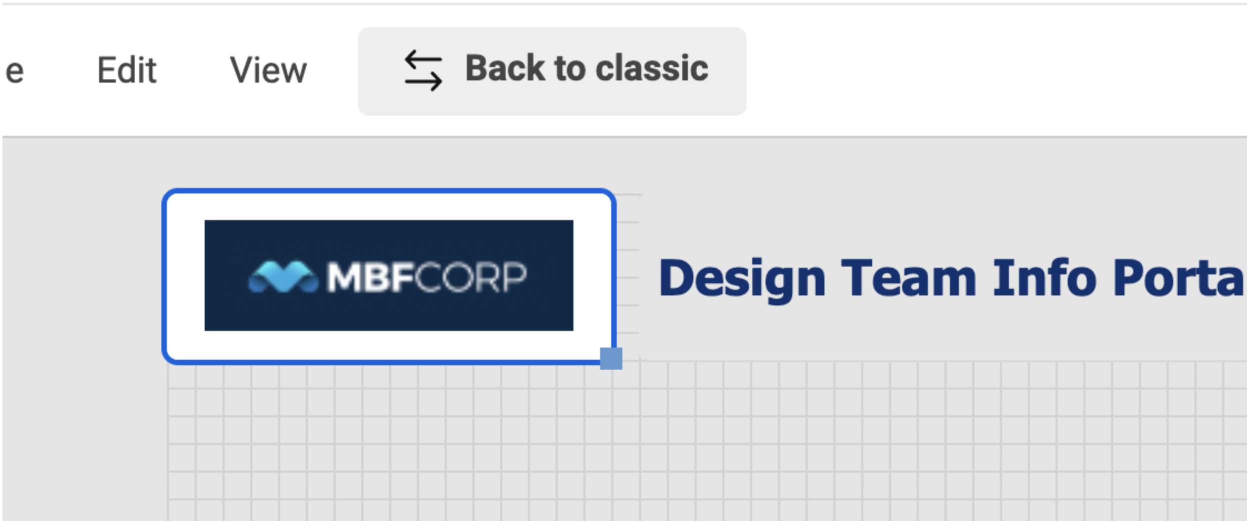
In this activity you'll create your team portal. A sketch of your team portal is available in the sheet attachments of the Marketing Request Tracker sheet. Download it to see what you'll make.

1. Open the **14_Marketing Request Tracker - Team Portal** sheet
2. Select the **attachments** button
3. Download the **Team Portal.png file**
4. Download the **mbfCorp_Logo.png file**

Add image widget

You need to add your company logo to the top left of your dashboard

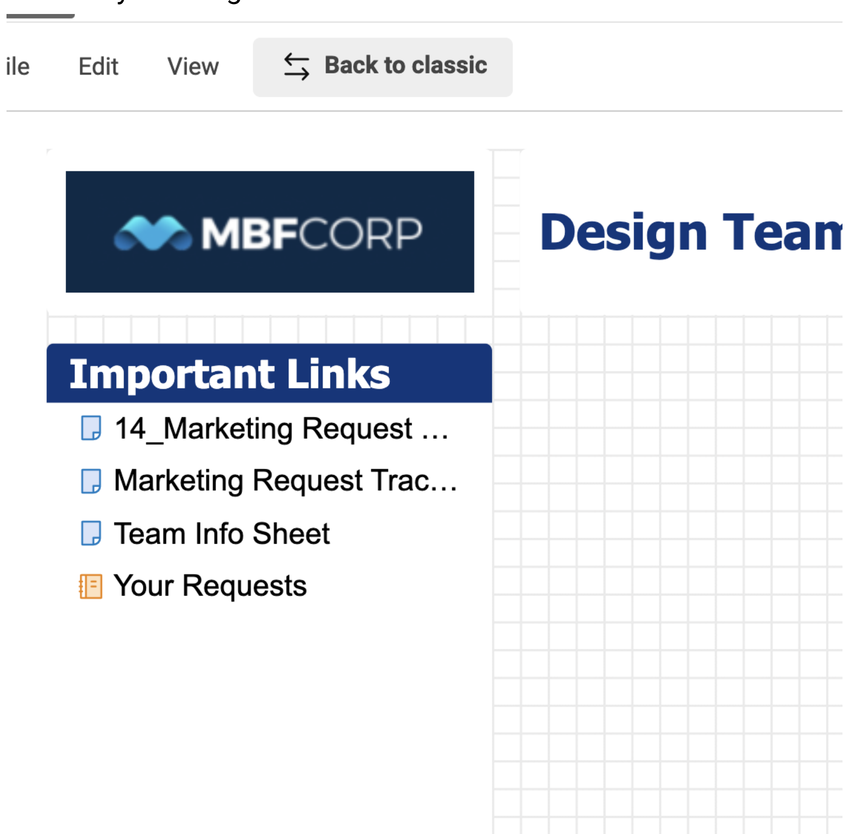
1. Open the **Design Team Info Portal**
2. Select **Edit** (pencil icon)
3. Select **Add Widget** (plus button)
4. Select **Image**
5. Select **Select Image**
6. Select **Upload from your computer**
7. Navigate to your downloaded image and select it
8. Select **Title**
9. Select the **Show title toggle**
10. Select **Open**
11. Adjust the **Widget Behavior** to whatever you like.
12. Select **Done**
13. Position the widget in the top left corner of your dashboard


e
Edit
View
Back to classic
MBFCORP
Design Team Info Portal

Add shortcut widget

Add a shortcut widget. Follow these instructions:

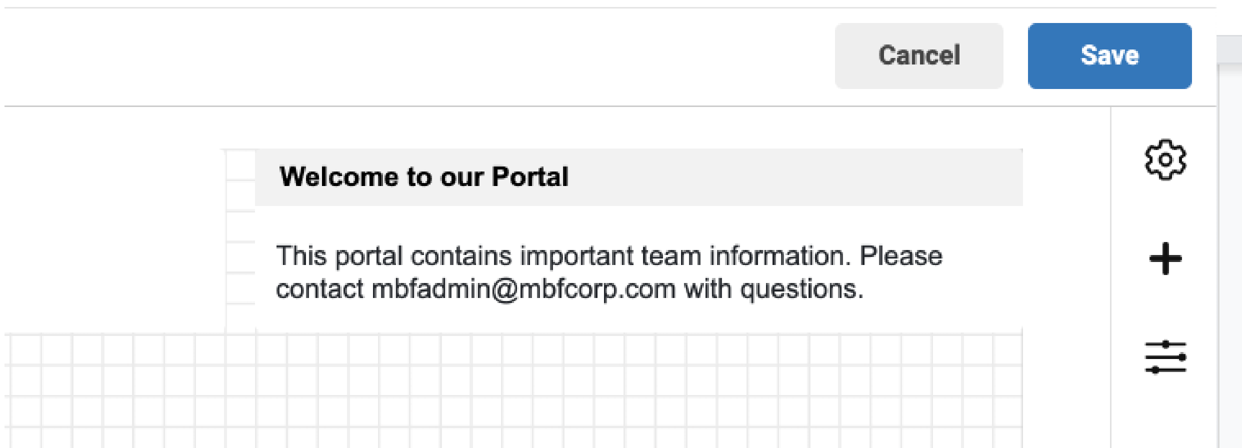
1. Select **Add Widget**
2. Select **Shortcut**
3. Select **Add Shortcut**
4. Select **Smartsheet Item**
5. Find and select all of these items. You can select multiple items at the same time: 14_**Marketing Request Tracker - Team Portal, Marketing Request Tracker - CLOSED REQUESTS, Team Info Sheet, Your Requests Report**
6. Select **OK**
7. Select the **title area** of the widget and type **Important Links**
8. Format your title like this
    a. Make the **background color the darkest shade of blue**
    b. Make the **font white**
    c. Increase the **font size to 16**
    d. Change the **font to Tahoma**
9. Position your widget and resize it to fit to the left of the chart



Add rich text widget

You need to add a rich text widget in the upper right corner of your dashboard explaining who to contact for questions. Follow these instructions:

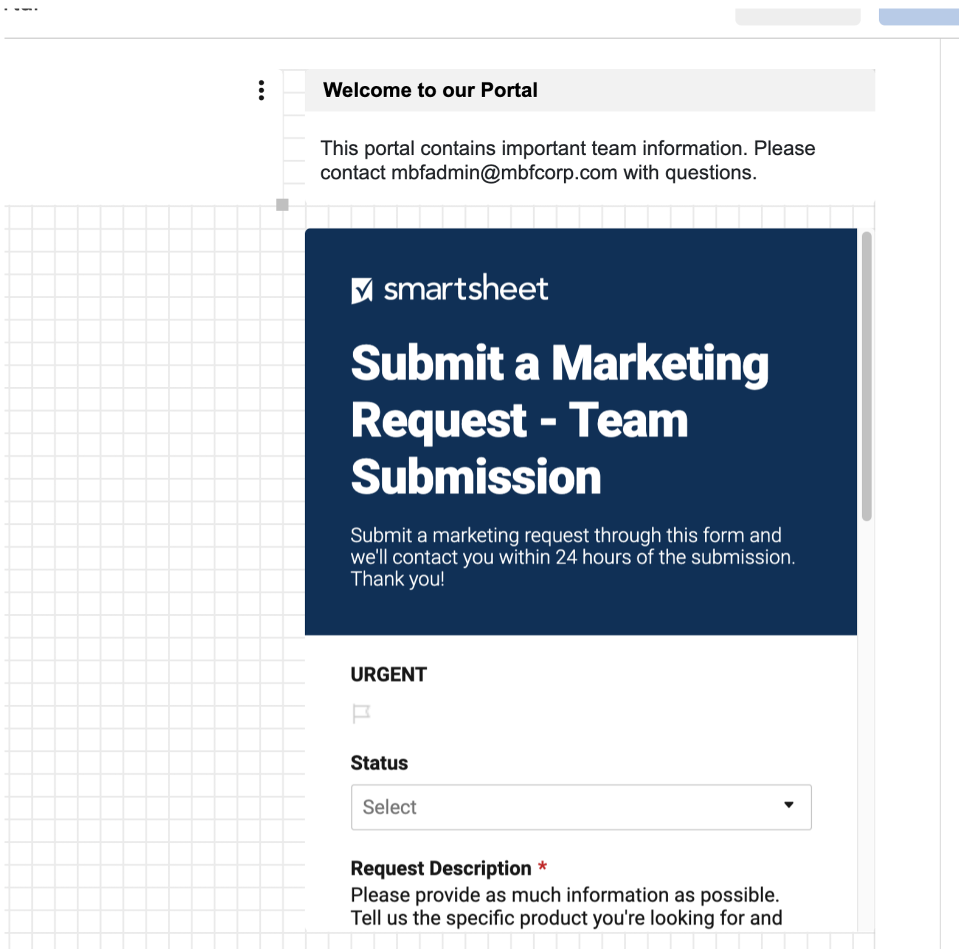
1. Select **Add Widget**
2. Select **Rich Text**
3. Select the title area and title your widget **Welcome to our portal**
4. Add some helper text that explains who to contact for questions.
5. Format your text however you'd like
6. Select **Done**
7. Position your widget in the top right corner above the request form



Add web content widget

You need to add the marketing request form to your portal for your employees to enter requests.

1. Open the **14_Marketing Request Tracker - Team Portal** sheet
2. Select **Forms**
3. Select **Manage Forms**
4. Copy the **form URL for the Submit a Marketing Request - Team SubmissionEmp** form
5. Open the **Design Team Info Portal** dashboard
6. Select **Edit**
7. Select **Add Widget**
8. Select **Web Content**
9. Select **Add Content**
10. **Paste your copied URL** into the space
11. Select **Submit**
12. Select the **Title section** in the Web Content Widget editor panel
13. Toggle the **Show Title toggle**
14. Position your form on the right side of the dashboard underneath the rich text widget



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Finish Team Data Rollup

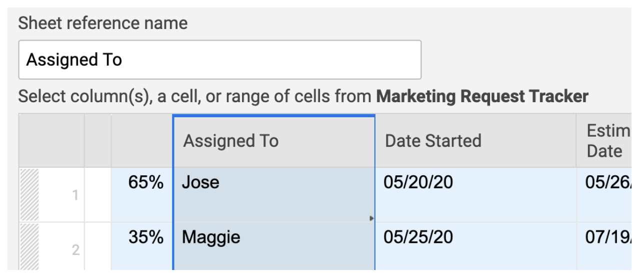
1. Open the Team Data Rollup sheet

2. In the Number of assigned requests column for Anouk's row start typing a COUNTIF formula

   =COUNTIF(

3. For the first range, you need to reference the Assigned To column. Select Reference Another Sheet

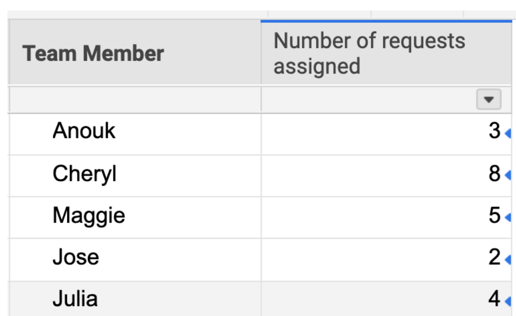
4. Find the 14_Marketing Request Tracker - Team Portal sheet in the activity folder and select the Assigned To column header. Name your reference "Assigned To". Select Insert Reference.



5. Make sure there's a comma after the reference and then select the cell with Anouk's name in it.

   =COUNTIF({Assigned To},[Team Member]@row)

6. Your formula is done and should be calculating the number of requests assigned to Anouk. Click and drag the bottom right corner of the cell to fill your formula down the column.



Team Member	Number of requests assigned
Anouk	3
Cheryl	8
Maggie	5
Jose	2
Julia	4

Add chart widget

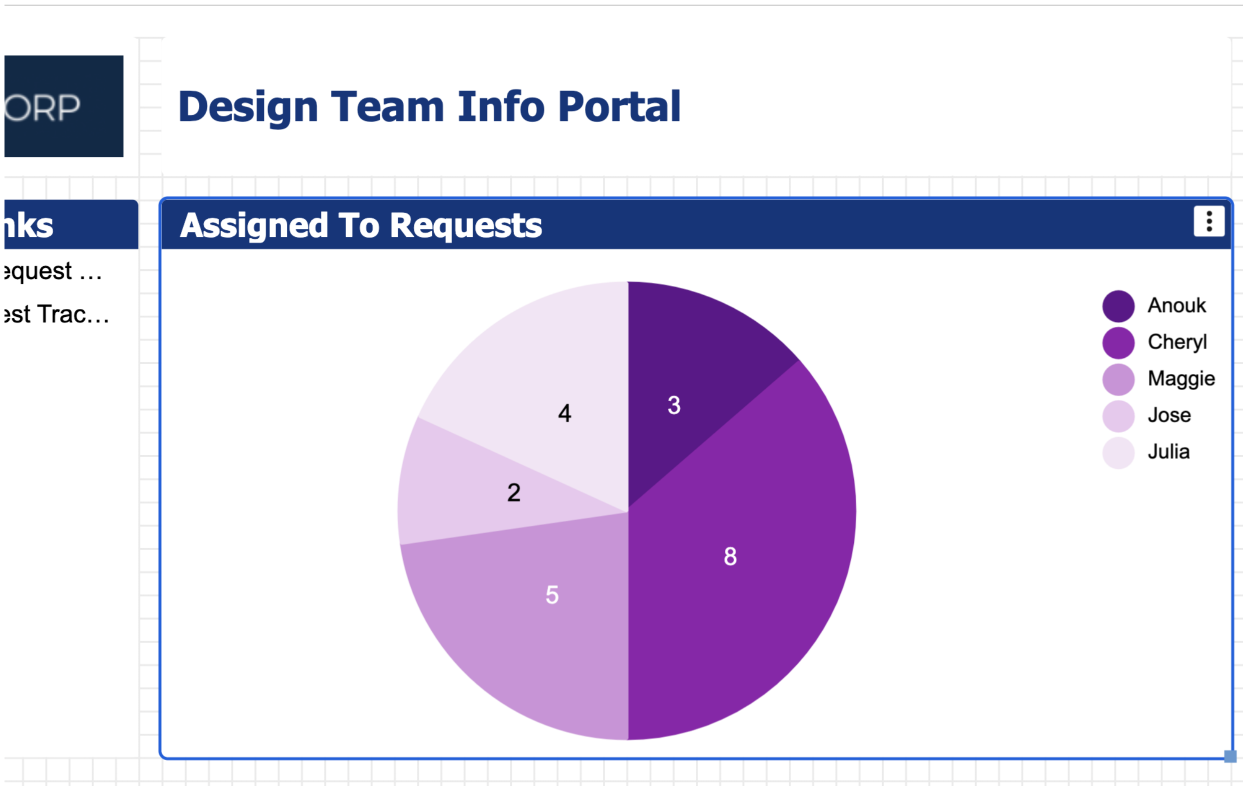
You need to add a chart widget widget in the middle of your dashboard that shows the number of requests assigned to each team member. Follow these instructions:

1. Open the **Design Team Info Portal**
2. Select **Edit**
3. Select **Add Widget**
4. Select **Chart**
5. Select **Add Data**
6. In the Add Chart Data window **find and select the Team Data Rollup sheet** in the activity folder
7. Select and highlight all the data available including the employee names.

Team Member	Number of requests assigned
Anouk	3
Cheryl	8
Maggie	5
Jose	2
Julia	4

8. Select **OK**
9. Select **Switch rows/columns toggle** so each team member has a different color bar
10. Select **Pie** from the Chart Type drop down
11. Select the Title of the widget
12. Format the **chart title** (make sure you title text is highlighted to make changes to the text)**:**
    a. Make the **background color the darkest shade of blue**
    b. Make the **font white**
    c. Increase the **font size to 16**
    d. Change the **font to Tahoma**
13. Expand the **Pie Chart & Series** section
14. Change the **Value Labels** to **Amount**
15. Change the **colors of your employees** to whatever you like (select the color block and pick a color or add in a custom color)
16. Position your chart in the middle of your dashboard between the Important Links and the Web Content Widget.

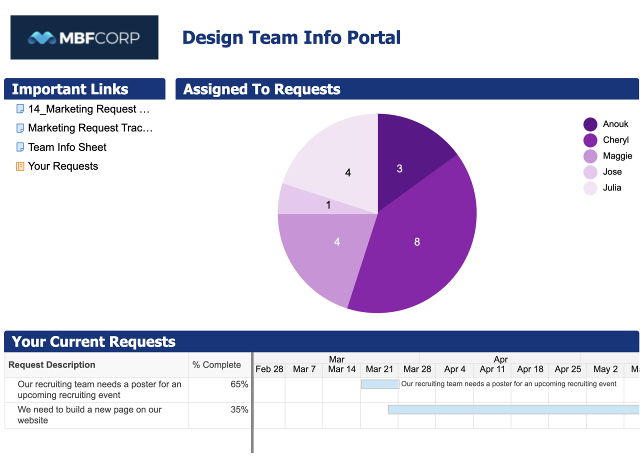
Add chart widget continued



Add a report widget

You want to add a report that shows the current users requests. This means that as your employees view the dashboard they'll only see the request they're working on. This also means the view will be blank for you unless you change some data in the 14_Marketing Request Tracker - Team Portal. If you want to see data in the report open the 14_Marketing Requests Tracker - Team Portal and assign yourself some requests in the Assigned To column.

1. Open the **Design Team Info Portal**
2. Select **Edit**
3. Select **Add Widget**
4. Select **Report**
5. Select **Add Report**
6. Find and select the **Your Requests report** in the activity folder
7. Select **OK**
8. Select the title and perform these actions on it:
    a. **Change the title** to something more descriptive
    b. Make the **background color the darkest shade of blue**
    c. Make the **font white**
    d. Increase the **font size to 16**
    e. Change the **font to Tahoma**
9. Select the **Remove Formatting** toggle to turn off the report formatting.
10. Select Viewer Mode
11. Select the **Their own perspective** radio button
12. Position your report under the chart widget



Extra credit

If you’d like to continue practicing, you can add team member information from the Team Info Sheet. We included pictures, job titles, and birthdays for you to play with.

Great job! You reached the end of the activity!