Smartsheet Formulas

All right. In this module, we are looking at the smart sheet formulas. This set of columns here are critical to the calculation. So, I'm back on the left-hand side, you've got the main columns. You've got the measured gates the blue columns, and then we get to the green columns over here. There's a set of them.

I'll come back to the objective achieved just now. What you also need to remember is that all the calculations happen at the lowest level at the objective level, there's typically a weighted calculation. And then any level above that, we typically just average the values of the children. So, this thing can go up three or four levels, in the hierarchy.

But we've got to think about the formulas at every one of these levels. So, the first one is progress calculation. And what it's doing it's simply looking at, the progress row, which we said. was way back progress. This one is just actual over target and it's doing a little bit of an extra loop here.

What it's doing is it saying. If it's a stretch target and the progress is above 0.6999, in other words, it's 70% and above give the person a hundred percent achievement. Otherwise, just take whatever value you've got in that progress row, and in this case, it was 40% as we roll up to the level above it, to the objective level.

What we do is we pull up the white number and we divide by the sum of the weights. That's all those calculations doing because we want a weighted average progress calculation at this level. And at any level above that, it's got an if error and average of the children if there's an error it will just give a no otherwise it's the average of the children.

That's the progress calculation. This is just a weighted calculation. So, it's looking at, this progress calculation and it's multiplying it by the weight. Remember in the main columns, we've got a weighting column this is just multiplying it by the weight. And then at the parent level, it will do the opposite.

We'll divide it by the weight level, the status calculation. What this is doing is looking at the status of each row. So, let's have a look at the status, so on track, dependent, behind, et cetera. And what it's doing on top of that is it's going back

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into a global sheet where we have listed the values of each one of these statuses.

So, if you're on track, you get a hundred percent. If a checking is required, we give you 70% behind 56% at risk, 10% and so on. This is to make it a variable here. So that per company, if you're not happy with these scores you can go and change it for your company. But these are default scores and what all be doing in this column is we doing the look up against the status. And we returning it's like a V lookup, except it's done with an index and match calculation, which is very similar to a V lookup and it will bring back other 170 or any of those values. This is just a weighted version of the same thing.

If this column is blank, then just return, a blank otherwise do the weighted calculation at the lowest level. This calculation is percent time used. What is doing is it's looking at the start of the quarter and the way we do that is we've got a due date on row two. We put the start to the quarter.

If I'm running a calendar year, I'll put it first to January, 1st of April, et cetera. But in a financial year, you need to just change that start date. So, at the beginning of the quarter, come in and change the start date. And then the next thing it's doing is saying I know when the start date is, and I know when the key result due date is how much time have you used so far?

And, in this case we've used 95%. In this case below we've used 62. Why are they different? I'm sitting on the 25th of February today, so I've used 95% of my time. Whereas if I've got a key result for the end of March, I have only use 62% of the time. All right. And then that calculation just calculates that, and this is progress minus the time used.

So, it's just doing that calculation to see how much of the time you have used, and that will influence the colour of the progress column over here. and the way we do that is with conditional formatting if we look over here and we look at, calculation that we've done here to say, look at the progress minus the time used and then assign a colour based on that.

You'd have to go into the intricacies of that, just to understand that. So that's calculation. The promised score over here all we doing is previously we rated it with a dropdown, the quality of the last activity here we just giving in the score. 1, 2, 3, 4, or zero, or one and it's three.

And then this date completed is populated by the workflow as a task reaches a hundred percent. It's going to populate this column over here. So those are the automated calculations, at this level most of them are weighted. So, they'll okay

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that one isn't but yeah, when we have to do weighted calculations at the objective level, and like I said, any level above that is just really as some on average of the children.

Any if it's an error because a blank. So those are the main calculations, from an analytical point of view, all the calculations are done in the system. It's just a case of understanding them and then being able to create your dashboards off that.