Mississippi Department of Information Technology Services

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ITS Procurement Project Management - Smartsheet FAQ

GENERAL QUESTIONS

1. **QUESTION: I have additional questions about Smartsheet, where do I go for answers?**
   ANSWER: Questions should be submitted to ISSHELP@its.ms.gov with "Smartsheet" in the subject line.

2. **QUESTION: How do I join the Procurement User Group (PUG) List Serve?**
   ANSWER: Email ISSHELP@its.ms.gov to request access with "PUG" in the subject line.

3. **QUESTION: Where is the link to the Project Request Form?**
   ANSWER: The link will be provided via the PUG and on the ITS website when it is active and ready for use. This FAQ document will also be updated as more information is available.

4. **QUESTION: Where can I access the Project Approval Authorization Form?**
   ANSWER: The Project Approval Authorization Form is available on the website and can be found at the following link: ITS Procurement Project Authority Delegation (smartsheet.com).

5. **QUESTION: Who can fill out the Project Approval Authorization Form?**
   ANSWER: The Project Approval Authorization Form can be completed by anyone on the Customers team, but it must be approved via signature by the official Agency Head or Public Institution CIO.

6. **QUESTION: Why do I have to fill out the Project Approval Authorization Form?**
   ANSWER: ITS requires approval of authorized representatives for *project approval* and *project management* within Smartsheet. Failure to submit this form with all requested information could cause delays in project initialization and project management.

7. **QUESTION: What is Smartsheet Dynamic View for ITS procurement process purposes?**
   ANSWER: Smartsheet Dynamic View, for ITS procurement purposes, is where all the Customer's project requests, or "Projects in Triage", will live until approved. This view will be available ONLY to approved agency delegates as outlined in the ITS Procurement Project Authority Delegation Form (i.e. project managers and Agency Heads/Public Institution CIOs or their designees).

8. **QUESTION: Where do I go to get access to Smartsheet Dynamic View for ITS procurement process purposes?**
   ANSWER: Once Dynamic View is available for use, the link will be provided via the PUG, the ITS website, and in an updated version of this document. Customer designated Project Managers will have secure access to Smartsheet and can create a free Smartsheet account, by visiting the following link: https://help.smartsheet.com/learning-track/free-users/get-started-free-user.

9. **QUESTION: Who do I contact to understand who the current designated project managers are on file with ITS?**
   ANSWER: For questions about who your agency/institution's designated project managers are, please contact ISSHELP@its.ms.gov with Smartsheet in the subject line.

10. **QUESTION: Where can I view the Customer Training and FAQ document?**
ANSWER: Customer Training and this FAQ are available on the ITS website, at the following link:
https://www.its.ms.gov/procurement/procurement-request-forms

PROJECT REQUEST FORM QUESTIONS

11. **QUESTION: Where can I submit the old Project Request forms?**
ANSWER: Once Smartsheet goes Live, we will no longer accept the "old" project request forms. Instead, you will submit a Project Request form via the Smartsheet link provided.

12. **QUESTION: Who can submit a Project Request Form in Smartsheet?**
ANSWER: Once Smartsheet goes Live, anyone can access the Project Request Form link and send a submission. However, before a project is initialized it must pass through a Triage process by ITS and be approved by your agency or institution's Project Approvers as outlined in the ITS Procurement Project Authority Delegation form signed by your Agency Head or Public Institution CIO.

13. **QUESTION: Why are there so many required fields – I just want to send in a request to "hold" my spot.**
ANSWER: Project requests are reviewed in order of receipt; however, agencies play a role in the timeline from submission of the project request to project initialization by managing incomplete requests in Dynamic View (aka "Projects in Triage"). All fields, including the required fields on the intake form will remain available for edit by you in Dynamic View until you request subsequent review by ITS. This allows for transparency in the project request process. To expedite a project request, we recommend that you gather all of your intended project information before submission and communicate with ITS procurement through ISSHELP@its.ms.gov for any questions.

14. **QUESTION: How do I get a copy of my submitted project requests?**
ANSWER: When you submit a project request, you may select "Send me a copy of my responses" at the bottom of the Project Request Form. You will then enter an email address to receive an emailed copy of your submission.

15. **QUESTION: What if I don't want to use Smartsheet and send in the request form?**
ANSWER: Once Smartsheet goes Live, ITS will no longer utilize the current "old hard copy request forms sent by e-mail or mail. Customers will be required to submit new project requests via the Smartsheet link provided. Failure to follow the new project request form submittal process will delay initialization of the requested project and may jeopardize Customer deadlines.

DASHBOARD QUESTIONS

16. **QUESTION: Do I have a dashboard per project? If so, how do I get a link to all my dashboards?**
ANSWER: There is one dashboard for each active and assigned procurement project. The technology consultant assigned to your project will be able to provide authorized agency project contacts with the link to your project. Once Smartsheet goes Live, ITS encourages feedback on the new system via email to ISSHELP@its.ms.gov, with "Smartsheet Feedback" in the subject line.

17. **QUESTION: What if I need to change some information on the project once it has been initialized?**
ANSWER: The technology consultant assigned to your project will be able to assist agency project contacts with making changes to your project details.

18. **QUESTION: How often does the dashboard update and by whom?**

ANSWER: Project dashboards will be live and linked directly to the project schedule within the procurement project management system. All information will update automatically within moments of a change being made. Therefore, as work is being completed, dates, completion percentages, and other key data points will update automatically, in real time.

19. **QUESTION: What is this Completion Percentage on the project dashboard and why does it change so much?**
    ANSWER: The Project's Completion Percentage and Substatus Completion Percentage are both averages that are weighted by the duration (workdays) of the project plan and provide a rough estimate of the project's progress based on the expected amount of time the project will take to complete. As tasks are completed, added, and removed, and the actual time spent on a task changes, these estimated percentages are expected to change frequently. ITS will continue to refine anticipated task durations once sufficient data is captured to inform these enhancements. Always communicate with the technology consultant assigned to your project for the best information about your project status.

EMAIL QUESTIONS

20. **QUESTION: I'm not receiving any emails from the Procurement Division after I submitted my request.**
    ANSWER: Please check with your agency IT Support to ensure the emails are being allowed through your firewall. Automated messages are sent from **MS Department of Information Technology Services via Smartsheet (automation@app.smartsheet.com or forms@app.smartsheet.com).**

DYNAMIC REPORT

21. **QUESTION: Do I need a Smartsheet account to see my Projects in Triage Report?**
    ANSWER: Yes. Making a Smartsheet account is free, and you can find more information about this at the top of this FAQ page.

22. **QUESTION: Who can see the "Projects in Triage" report?**
    ANSWER: Authorized Customer Project Managers, once they have a Smartsheet account, can sign into Smartsheet and see the Projects in Triage Report. They can review the Triage status and make updates to their project information within the report. To become an authorized Customer Project Manager for your agency or organization, you must have delegated authority. The first section of this FAQ document contains more information about the ITS Procurement Project Authority Delegation form that must be signed by your Agency Head or Public Institution CIO.

23. **QUESTION: How will I get notified that my project needs more information for triage?**
    ANSWER: Authorized Customer Project Managers will receive an automated email requesting any additional information needed for your project. The email will include a comment from the ITS Triage Team regarding what is required and will provide a link to the Projects in Triage Dynamic Report where your authorized Customer Project Managers can submit the required information.