



HOW TO CREATE BASIC WORKFLOWS IN SMARTSHEET

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OVERVIEW

Workflows are used to automate manual tasks, such as alerting someone, requesting approvals, or moving/copying rows in a spreadsheet. They are based on specific Triggers (when), Conditions (optional filters), and Actions (what) that you set up in advance to meet your process needs.

PRACTICE EXERCISE #1

You have created an Employee Information Directory in Smartsheet where Human Resources (HR) keeps track of basic employee information.

The screenshot shows a Smartsheet spreadsheet titled "Employee Information Directory". The spreadsheet has the following columns: Employee Picture, Employee Name, Title, Date of Hire, Home Address, Telephone, Employment Status, and Notes. The data is as follows:

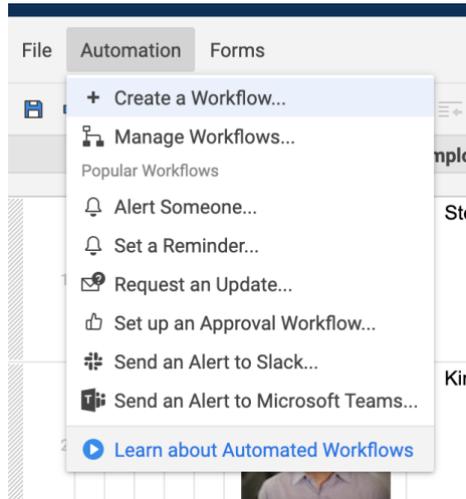
	Employee Picture	Employee Name	Title	Date of Hire	Home Address	Telephone	Employment Status	Notes
1		Steve Green	Director of Finance	07/18/19	15 Elm St, Bellevue, WA 98005	425-256-1234	Full Time	
2		Kin Tomankowski	BI Analyst	12/22/18	1425 Blizzard Ave, Redmond, WA 98053	425-672-8643	Contract	
3		Jane Befroy	Tech Support	08/18/20	100 Olympic Ave, Seattle, WA 98101			
4		Albert Torra	Legal Intern	12/27/17				
5								
6								
7								
8								

Whenever a new employee is added to the Directory, you need to alert the HR Administrator so that she can send out an announcement welcoming the newest member of your team.

STEPS

1. Create a New Workflow

i In the menu, select “Automation,” then “Create a Workflow...”



2. Create the Title and Trigger

i Click on “Untitled Workflow” and type “New Employee Welcome Announcement.”

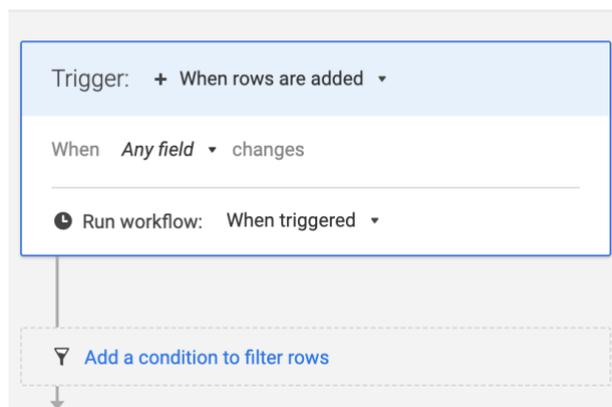
In the “Trigger” dropdown menu, select “When rows are added.”

“When” can remain “Any field changes.” We aren’t targeting just one field with this alert.

In the “Run workflow” dropdown menu, select “When triggered.”

You do not need to select “Add a condition to filter rows” in this scenario because we want this alert to apply to all new rows.

New Employee Welcome Announcement



3. Create the Action

i Under “Select an action,” choose “Alert someone.”

In the dropdown menu, select “Send to specific people.”

In the field below, type the HR Administrator’s email address.

Click on “Customize Message.” In the subject field, type “New Employee Welcome Announcement.” In the body of the message, type “Hello. A new employee has been added to the directory. Please send out a welcome announcement. Thank you.”

Under “Message includes,” select “Links to sheet and all fields.” This means the email message will include the new row details and a link to the spreadsheet.

Click “Save.”

The screenshot shows the configuration for an email alert action. At the top, it says "Alert someone" with a bell icon and a three-dot menu. Below that is a dropdown menu labeled "Send to specific people" with a person icon and a downward arrow. Underneath the dropdown is a text input field containing the email address "hradmin@partners.org". A horizontal line separates this from the "Customize message" section. In this section, there is a subject line input field with the text "New Employee Welcome Announcement". Below the subject line is a larger text area containing the message body: "Hello. A new employee has been added to the directory. Please send out a welcome announcement. Thank you." At the bottom of the form is a section titled "Message includes:" with three radio button options: "Links to sheet and all fields" (which is selected), "Links to sheet and specific fields", and "Message only".

You’re done! Now, the HR Administrator will receive an email alert when a new employee is added to the directory.

PRACTICE EXERCISE #2

It’s your turn! Create a workflow for the following scenario using the same spreadsheet: After a person has been a contractor for one year, you need approval from the HR Manager to renew their contract. (Use your own email address for the HR Manager.)

MORE INFORMATION

For more information on workflows, visit <https://help.smartsheet.com/learning-track/smartsheet-intermediate/automation>.