HOW TO CREATE BASIC WORKFLOWS IN SMARTSHEET

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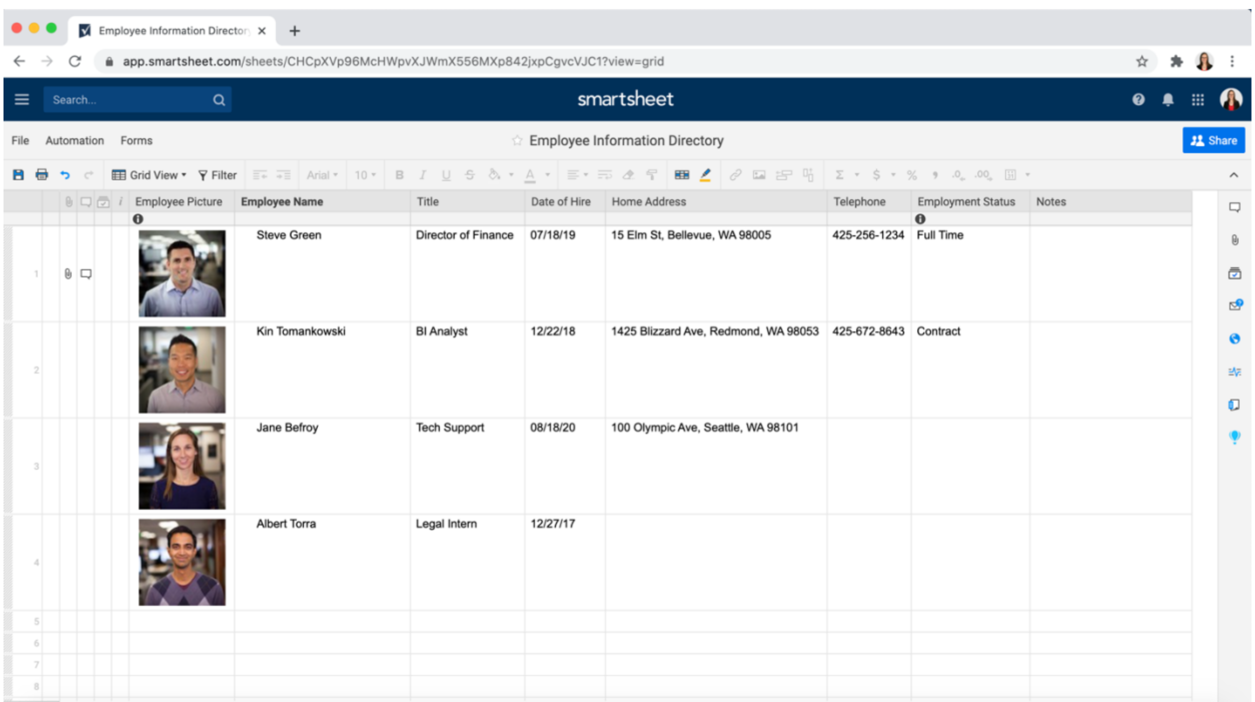
OVERVIEW

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.

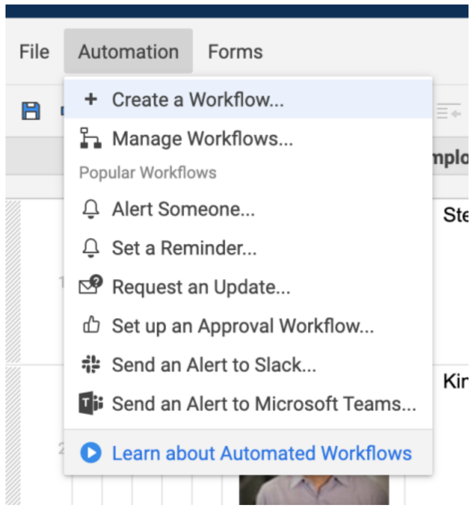


Whenever a new employee is added to the Directory, you need to alert the HR Administrator so that she can send out an announcement welcoming the newest member of your team.

STEPS

1. Create a New Workflow

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



2. Create the Title and Trigger

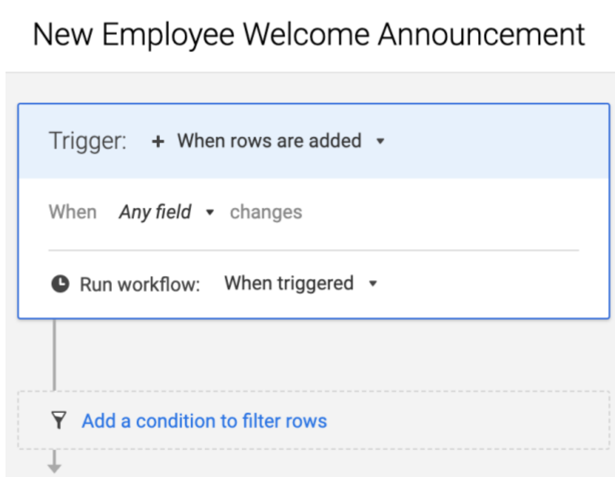
Click on “Untitled Workflow” and type “New Employee Welcome Announcement.”

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.



3. Create the Action

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

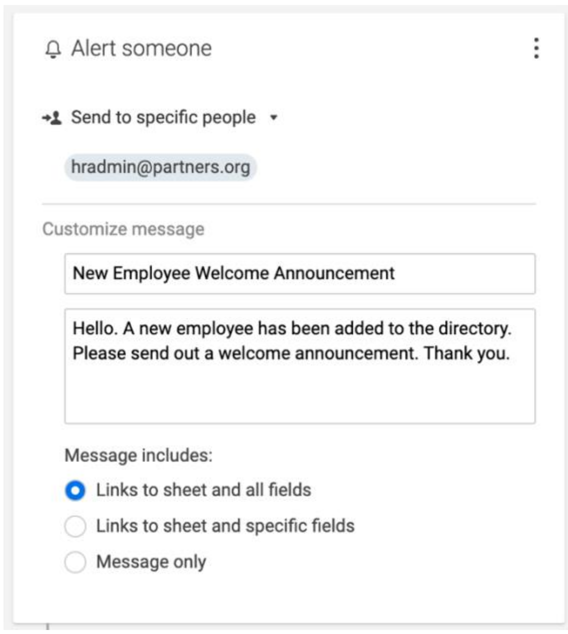
In the dropdown menu, select “Send to specific people.”

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.”



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.