



Employee Contact Lists

Template Set Getting Started Guide

The Employee Contact Lists template set helps you easily manage critical employee information and organize it by department or role.

Employee Contact Lists

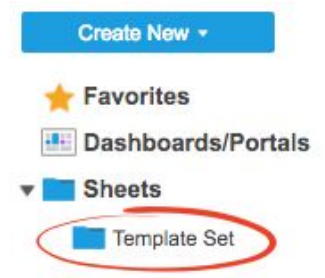
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[Employee Contact Lists Template Set](#)

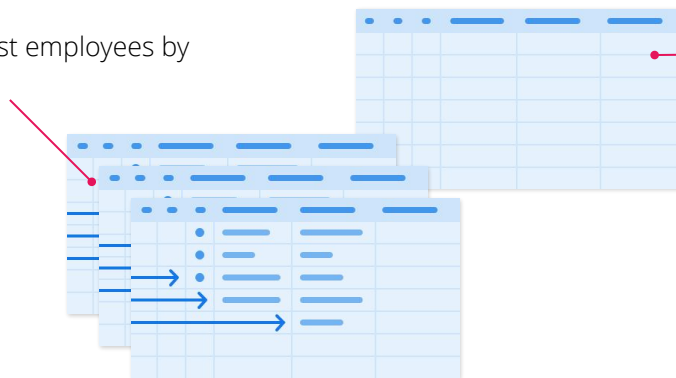


What's Included in the Set

With the Employee Contact Lists template set, you can quickly start managing employee information and create a real-time org chart.

Team Reports (x3)

Create custom views that list employees by department or team.



Employee Info Sheet

Store all relevant information about your employees.

Employee Contact Lists

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Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

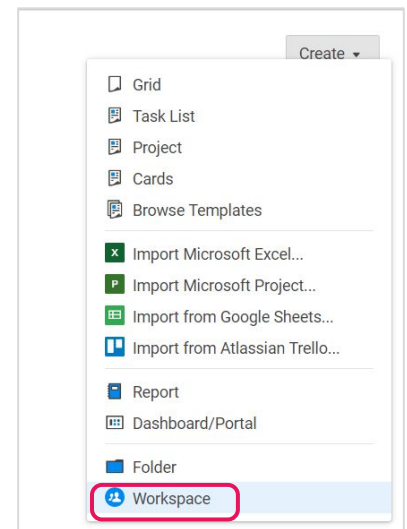
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



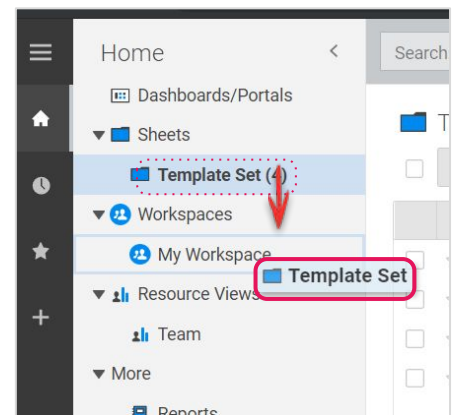
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

[Manage Items in a Workspace \(Add, Move, Remove\)](#)



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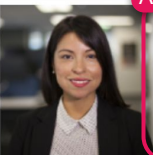



Customize

Step 3:

Setup the Employee Information Sheet

The Employee Info sheet is where you will store all of your employee information. Once you add all the relevant information to this sheet you can create reports that display employees by department.

- Enter your employees' information into the sheet.
- Upload an employee headshot by right-clicking in the Employee Picture column and selecting Insert Image.
- Employee Name and Reports To are contact list columns.
- You can add additional columns to the sheet and adjust the dropdown list in the Department column by double-clicking on the column header
- Upload pertinent employee information to create one source for key details by adding attachments (paperclip icon).

File Automation Forms								
Grid View Filter Arial 10 B I U S A								
	Employee Picture	Employee Name	Title	Department	Date of Hire	Home Address	Telephone	Reports
1		Alex Bright	Sr Sales Manager	Sales	02/15/17	1 Avery Street, Boston, MA 02111	508-232-4482	Franc
2		Anthony Gruenelli	HR Manager	HR	01/03/18	210 Allandale Rd, Boston, MA 02130	216-843-2842	Kenne
3		Cari Franklin	Sales Representative	Sales	03/13/18	1425 Blizzard Ave, Redmond, WA 98053	425-672-8643	Alex E
		Hiro Senjima	Finance Executive	Finance	02/27/14	262 Skid St, Kirkland, WA 98033	425-374-8264	Kenne

Learn more:

[Contact List Column Type, Insert, Delete, or Rename Columns, Include a Picture or Other Image in Your Sheet, Upload an Attachment](#)

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Step 4:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Employee Info sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the total number of employee, and also the total number by department and employment status. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

The screenshot shows the Smartsheet interface with a table of employee data and a 'Sheet Summary' panel on the right. The table has columns for 'Date of Hire' and 'Home Address'. The 'Sheet Summary' panel includes a 'Please provide feedback' link, a 'WHAT IS SHEET SUMMARY?' section, and a list of summary fields with their values: 'Total # of Employees' (9), '# of Employees in Department: Finance' (3), '# of Employees in Department: Marketing' (2), '# of Employees in Department: Sales' (3), and '# of Employees in Department: HR' (1). A red circle 'A' highlights the sheet summary icon in the right sidebar, and a red circle 'B' highlights the '+ New Field' button at the bottom of the summary section.

Date of Hire	Home Address
5/17	1 Avery Street, Boston, MA 02111
3/18	210 Allandale Rd, Boston, MA 02130
3/18	1425 Blizzard Ave, Redmond, WA 98053
7/14	262 Skid St, Kirkland, WA 98033

Sheet Summary

[Please provide feedback](#)

WHAT IS SHEET SUMMARY?

Sheet Admins can define, organize, and report on critical information in this sheet with Sheet Summary such as team contacts, metrics, and deadlines.

Total # of Employees *f(x)*

9

of Employees in Department: Finance *f(x)*

3

of Employees in Department: Marketing *f(x)*

2

of Employees in Department: Sales *f(x)*

3

of Employees in Department: HR *f(x)*

1

+ New Field

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

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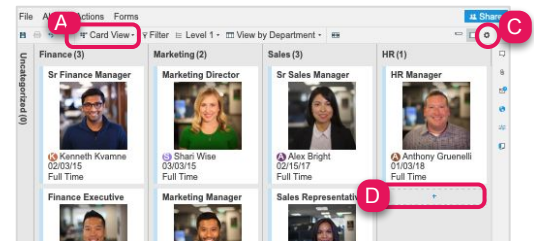
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Step 5:

Create an Organization Chart in Card View

Card View is a visual way to to create a company organization chart. Cards are categorized into lanes, driven by Dropdown list, Contact list, and Symbol column types in your sheet.

- Click on the *Grid View* button in the toolbar to switch from *Grid* to *Card View*. The default Card View should be lanes by Department.
- Click and drag cards to prioritize and organize them in the lanes.
- Click on the gear icon in the top right corner to adjust your Card View Settings and define which fields you want to display in your cards.
- Double-click on cards to edit them.
- Add new cards by clicking the + button on any lane.

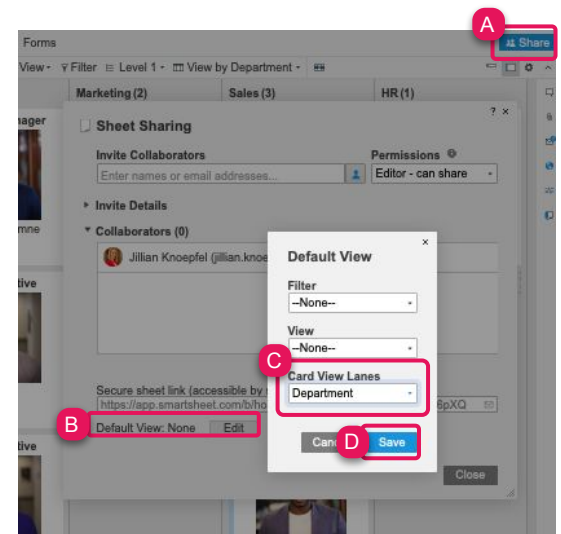


Step 6:

Save Card View as the Default View

Setting the default view will ensure that the Employee Info sheet will open to the Card View organized by department when it's shared to other users.

- Click on the Share button in the upper right corner.
- Click Collaborators and you'll notice that the Default View button appears below the Secure Sheet Link. Click the Edit button next to Default View and click Card View.
- In the same screen, click the box below Card View Lanes and click Department.
- Click the Save button to save your default view of the sheet.
- Share the Employee Info sheet with all of your department managers that have Editor permissions.



Learn more:

[Using Card View to Visualize Your Project](#), [Card View: Creating, Editing, and Sharing Cards](#)

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Step 7:

Get a Custom View with Reports

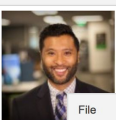
Reports allows you to create custom views of employees by department, that can be distributed to different audiences. In the template set, you'll find three reports (Finance Team, Marketing Team, and Sales Team), but you can create more by duplicating an existing report. Reports are bi-directional, which make it easy to update and manage data from one filtered view. Once sharing is setup correctly, each manager can build a team portal dashboard for their department, and embed the team report into the dashboard using a *Report* widget.

- A. Share each of your department reports with the department manager who is responsible for maintaining their team contact information and give them *Editor* permissions. NOTE: For this to work, the managers must already be shared as *Editors* to the Employee Info sheet.
- B. Now, managers can update and manage their own teams from their department-specific report.

File

Grid View

Report Builder

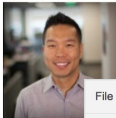
	Employee Picture	Employee Name	Title	Department	Date of Hire	Home Address	Telephone
1		Nick Young	Marketing Manager	Marketing	06/07/17	28 Willoughby Street, Boston, MA 02101	216-483-5856

Share

File

Grid View

Report Builder

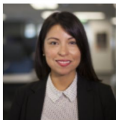
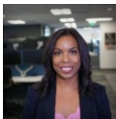
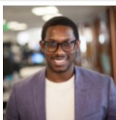
	Employee Picture	Employee Name	Title	Department	Date of Hire	Home Address	Telephone
1		Hiro Senjima	Finance Executive	Finance	02/27/14	262 Skid St, Kirkland, WA 98033	425-374-826

Share

File

Grid View

Report Builder

	Employee Picture	Employee Name	Title	Department	Employment Status	Date of Hire	Home Address	Telephone
1		Alex Bright	Sr Sales Manager	Sales	Full Time	02/15/17	1 Avery Street, Boston, MA 02111	508-232-4482
2		Cari Franklin	Sales Representative	Sales	Full Time	03/13/18	1425 Blizzard Ave, Redmond, WA 98053	425-672-8643
3		Tony Geoffries	Sales Representative	Sales	Part Time	10/27/16	230 Dudley Road, Newton Center, MA 02459	508-245-2455

Share

Learn more:

[Build a Report](#)

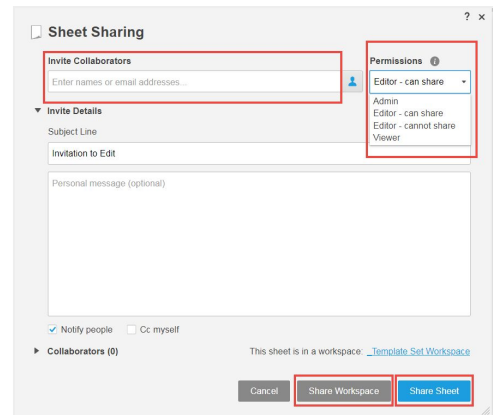
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Step 8:

Share Your Employee Contact Lists Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).



Learn more:

[Workspace Sharing](#)