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.

smartsheet.com
Last Updated: August 31, 2019

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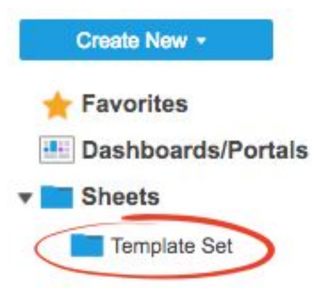
REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not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

Get the Template Set



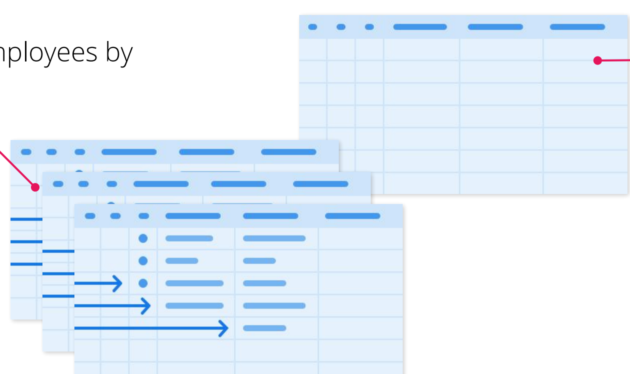
Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

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.

Set Up

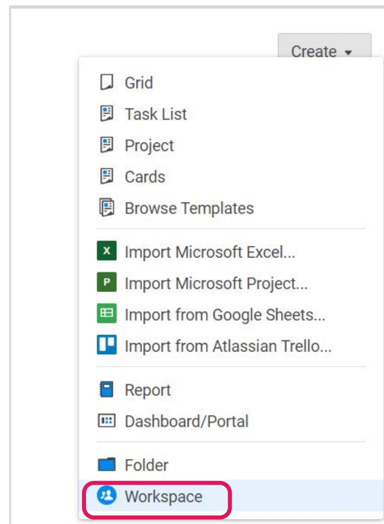
Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

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

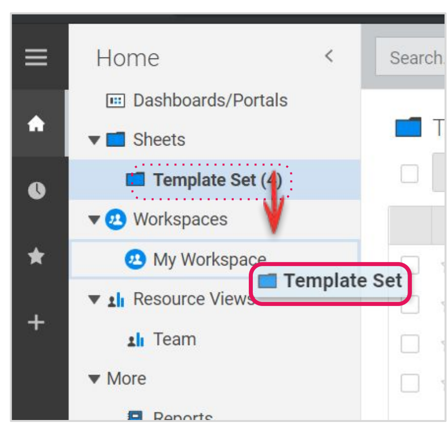


Step 2:
Drag the Files into Workspace

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.

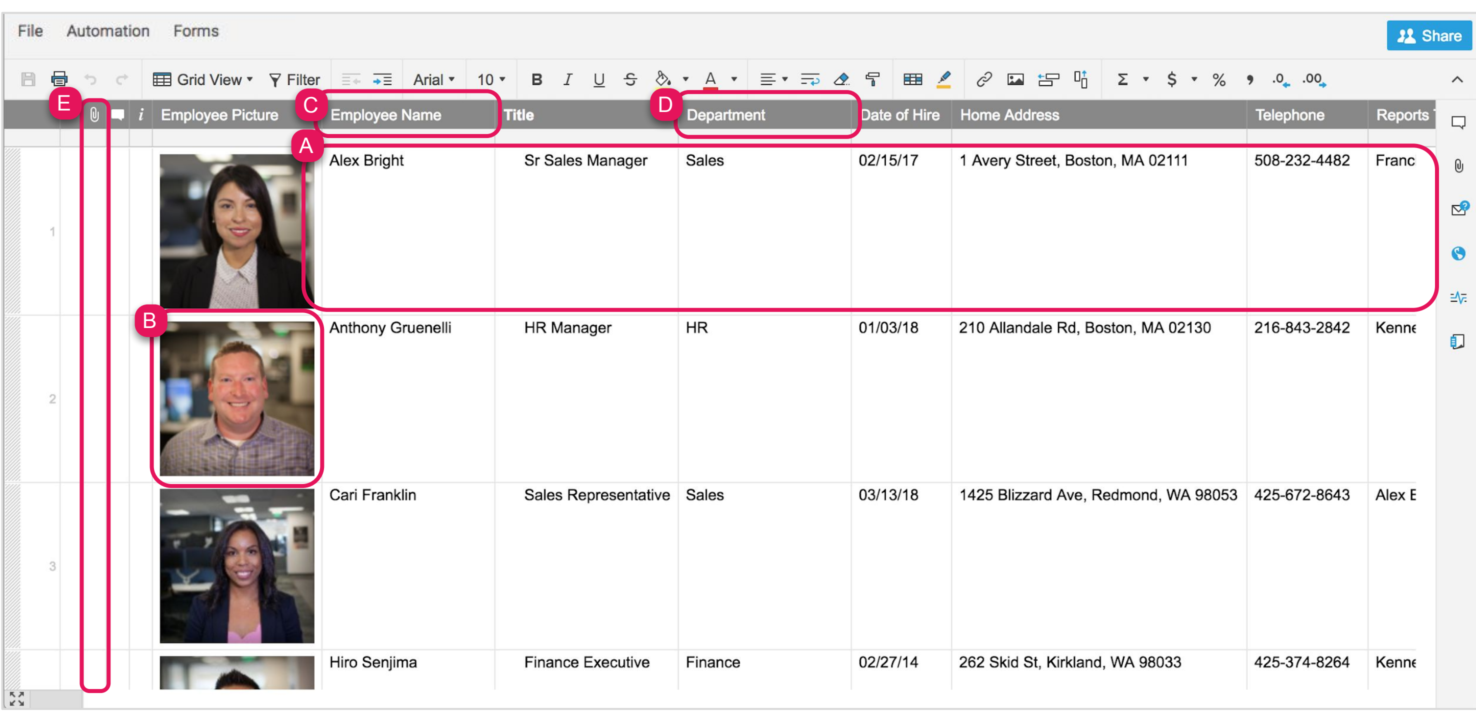
A. Enter your employees' information into the sheet.

B. Upload an employee headshot by right-clicking in the Employee Picture column and selecting Insert Image.

C. Employee Name and Reports To are contact list columns.

D. You can add additional columns to the sheet and adjust the dropdown list in the Department column by double-clicking on the column header

E. Upload pertinent employee information to create one source for key details by adding attachments (paperclip icon).



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

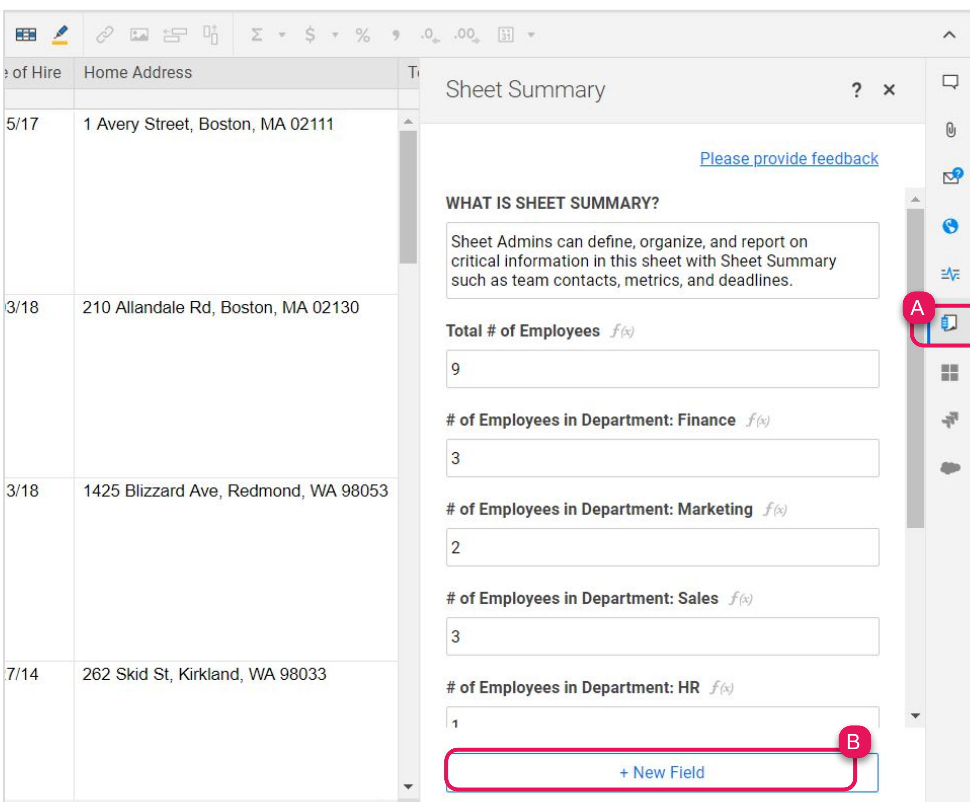
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Employee Info sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of 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.

A. 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.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. 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.



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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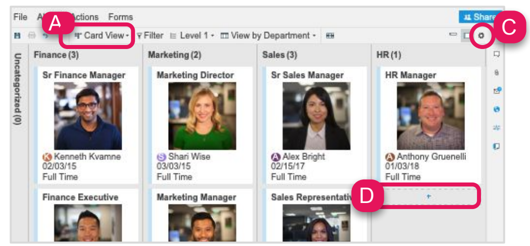
Step 5:

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.



A. 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.

B. Click and drag cards to prioritize and organize them in the lanes.

C. 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.

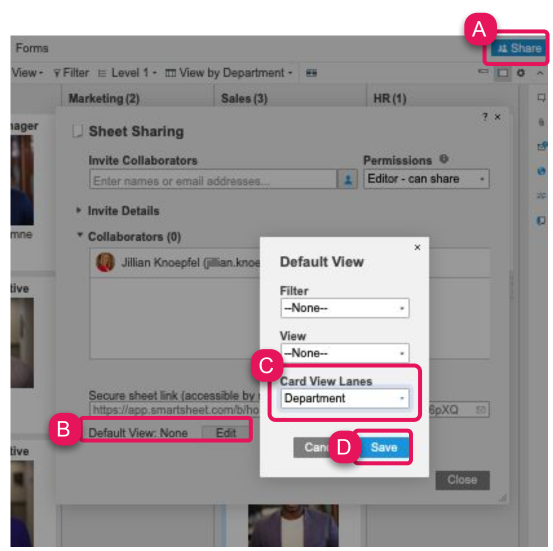
D. Double-click on cards to edit them.

E. 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.



A. Click on the Share button in the upper right corner.

B. 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.

C. In the same screen, click the box below Card View Lanes and click Department.

D. Click the Save button to save your default view of the sheet.

E. 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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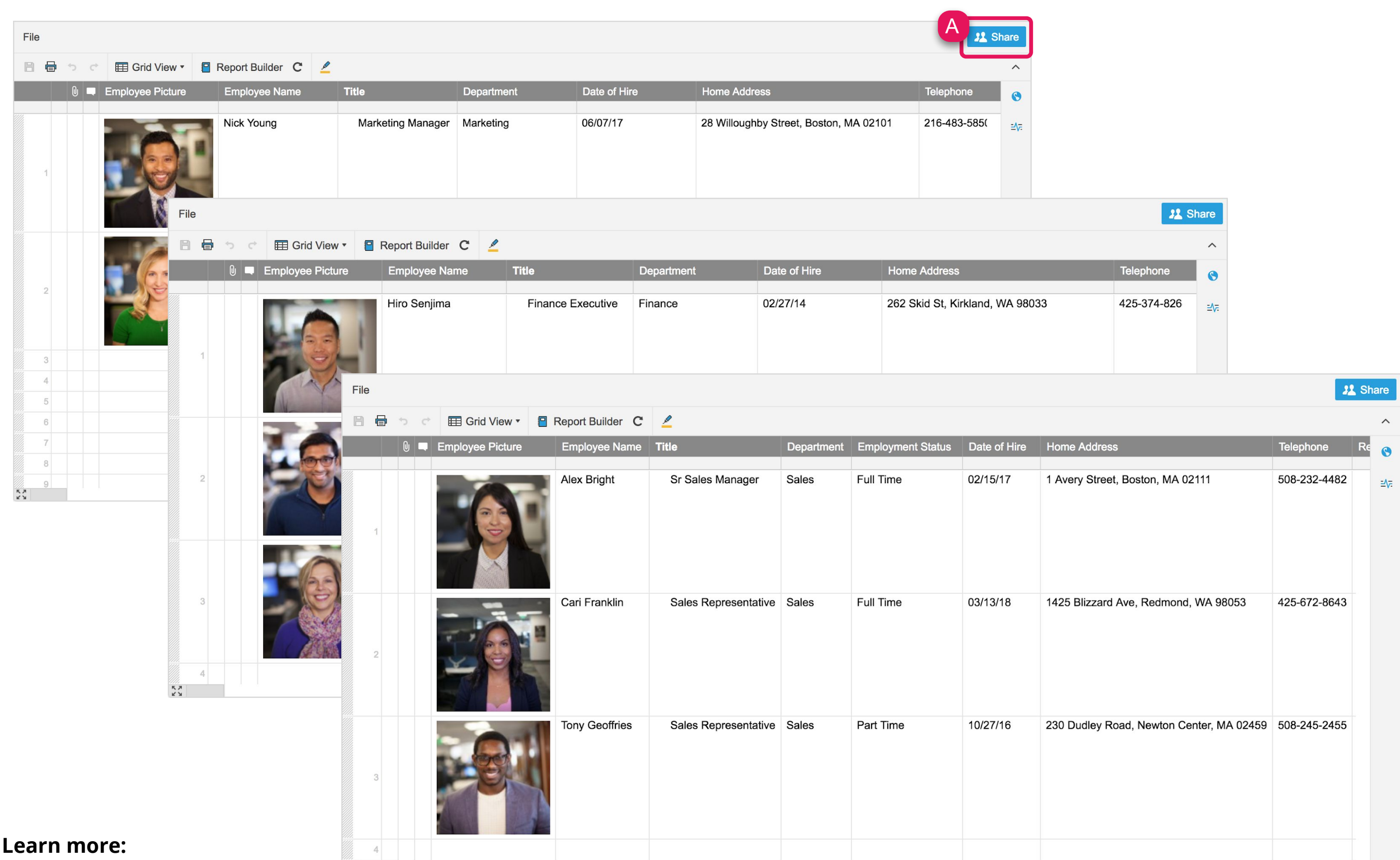
Step 7:

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.



Learn more:

[Build a Report]

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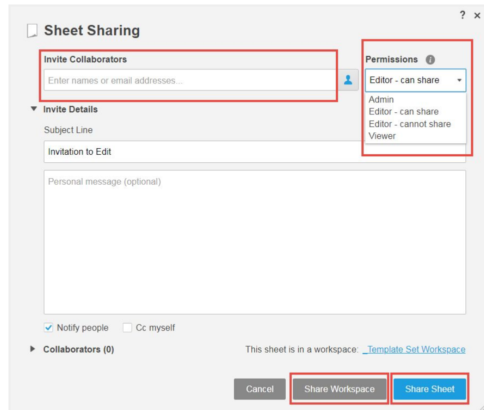
Step 8:

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

FEEDBACK: Let us know what you think of the Employee Contact Lists Template Set! Share your feedback here.