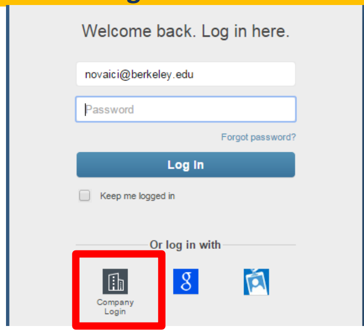
# ASE/GSR Hiring Smartsheet: Quick Reference Guide

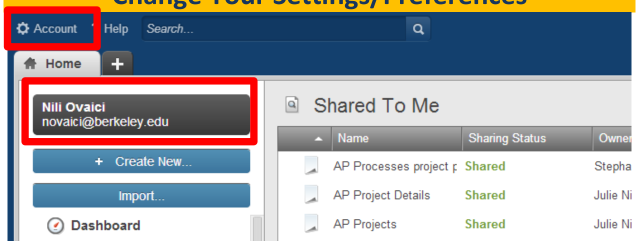
## Access and Login to the Smartsheet Site




1. Go to smartsheet.com and click **Login**.
2. Click the **Company Login** button.
3. Log in with your CalNet ID and Passphrase.

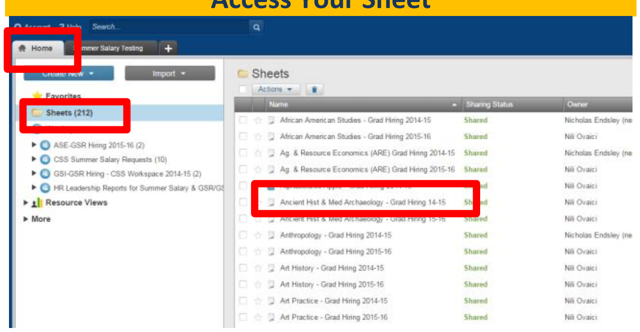
** Please note that if the "Company Login" button does not appear, type in your @berkeley email address and click login (do not put in a password).

## Change Your Settings/Preferences




1. To change your account settings such as your color scheme, click the Account button.
2. To change your personal settings, such as name, email preferences, or auto-save settings, click the black box with your name and email.

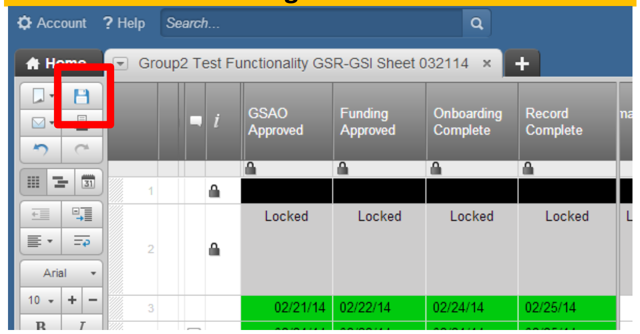
## Access Your Sheet




Any open sheet will remain open, even if you choose to log in and out, until you choose to close the tab.

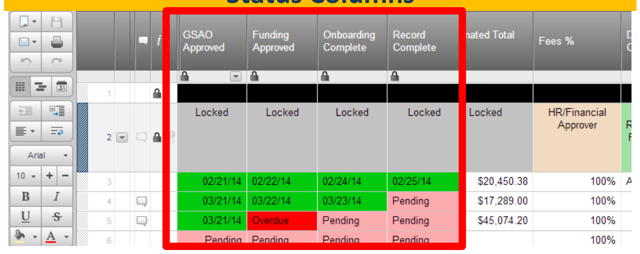
1. To find the ASE/GSR Hiring sheet for your unit, click the **Home** tab, click on the **Sheets** folder on the left-hand bar, and double-click on the appropriate sheet.

## Saving the Sheet




In order to save your Smartsheet, either click the floppy disk image in the left sidebar or click CTRL+S.

## Status Columns




The status columns work as a quick reference to monitor appointment status. They are color-coded as follows: green is COMPLETE, pink is PENDING, and red is OVERDUE.

- GSAO Approved: Date of GSAO Approval
- Funding Approved: Date of Accounting Approval
- Onboarding Complete: Date student's paperwork is completed (if applicable)
- Record Complete: HCM Entry Date

## GSAO/Unit Initiator


- Columns GSAOs are responsible for are shown in blue and marked as "GSAO."
- GSAOs are responsible for entering in a student's personal information (Name, Email, SID, home dept, etc.) and job details (Job Title, Step, Appt %, Begin Date, End Date, etc.).

***IMPORTANT:*** *GSAOs must enter in a student's name, SAVE, REFRESH, and then enter in the rest of the student's information.*

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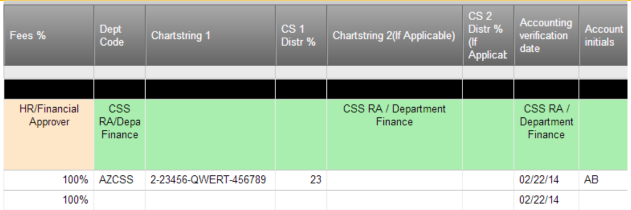
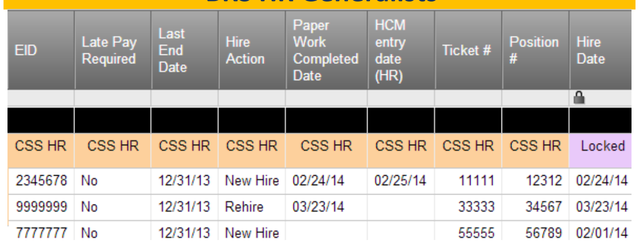
## Research Administrator/Financial Approver



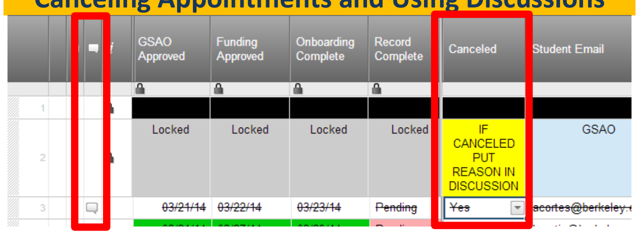

- Columns that RAs and FAs are responsible for are shown in green and marked as “BRS RA/Department Finance.”
- RAs and FAs are responsible for entering Fees %, Dept Code, and chartstring information (up to 2 chartstrings).

## BRS HR Generalists




- Columns HR Generalists are responsible for are shown in peach and marked as “BRS HR.”
- BRS HR Generalists are responsible for entering status details (Late Pay, Hire Action, etc.) and coordinating onboarding.

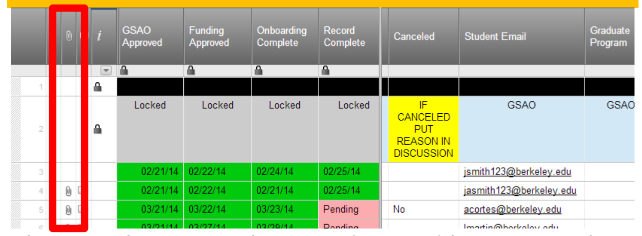
## Canceling Appointments and Using Discussions




If an appointment needs to be canceled, choose **YES** in the **Canceled** column to strike-out the row. You must put a reason within the discussion column, which is denoted with a chatbox. If a chatbox appears in that column, then a discussion already exists for that row.

1. Click the chatbox image in the row.
2. Click “New Discussion” or choose an appropriate existing one, enter cancelation details, and click **SAVE**. All discussion items are name, time, and date-stamped.

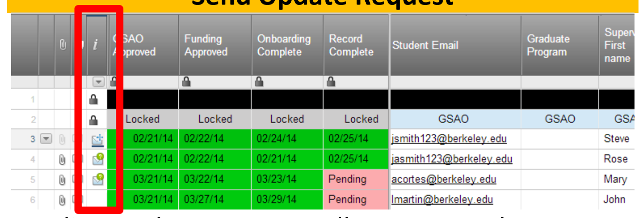
## Attachments




The Attachments column is denoted by a paperclip. If a paperclip appears in that column, then attachments already exist for that row.

1. Click the paperclip image in the row.
2. Click the **Upload** button, choose the appropriate file to attach, and click **Open**.
3. Attachments can be downloaded, emailed, or updated with a newer version.

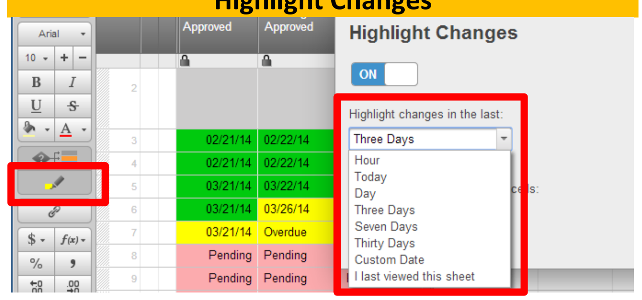
## Send Update Request




Sending Update Requests allows you to share a row with a party without having to share the entire spreadsheet. If an update request has already been sent out for that row, an envelope with a question mark will appear in that column.

1. Hover over the *i* column and click the envelope that appears.
2. Type in the email address of appropriate party and click **Send**.
3. You will receive an email when they successfully update the row.

## Highlight Changes




- Turn on **Highlight Changes** feature by clicking the highlighter image in the left sidebar.
- Customize the highlighted changes to show changes made within the hour, day, week, etc.