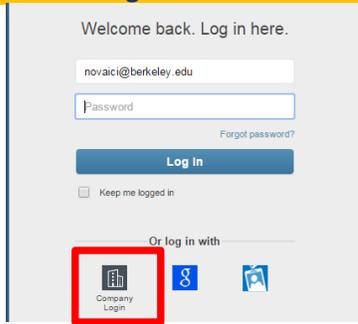


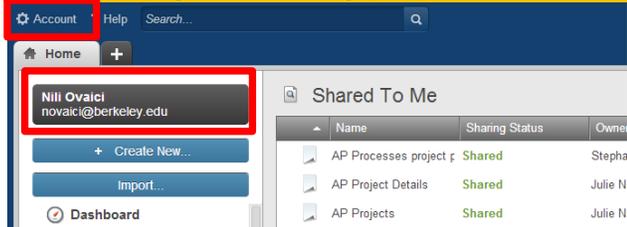
# ASE/GSR Hiring Smartsheet: Quick Reference Guide

## Access and Login to the Smartsheet Site



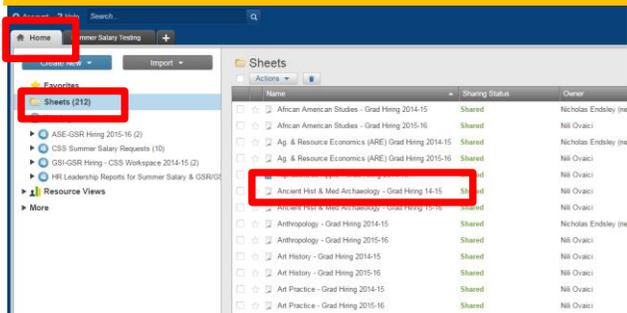
1. Go to [smartsheet.com](https://smartsheet.com) and click **Login**.
  2. Click the **Company Login** button.
  3. Log in with your CalNet ID and Passphrase.
- \*\* Please note that if the “Company Login” button does not appear, type in your @berkeley email address and click login (do not put in a 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.

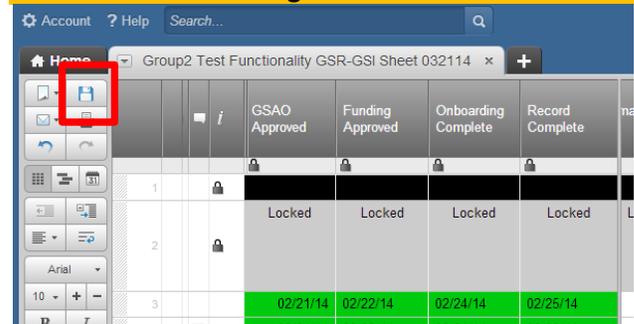
## Access Your Sheet



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

Last Name, First Name	Canceled	Student Email	Graduate Program	Supervisor First name	Supervisor Last name	SID
GSAO	IF CANCELED PUT REASON IN DISCUSSION	GSAO	GSAO	GSAO	GSAO	GSAO
Smith, John		jsmith123@berkeley.edu		Steve	Foster	98765432
Smith, Jane		jsmith123@berkeley.edu		Rose	Smith	12345678

- 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

Fees %	Dept Code	Chartstring 1	CS 1 Distr %	Chartstring 2(if Applicable)	CS 2 Distr % (if Applicable)	Accounting verification date	Account initials
HR/Financial Approver	CSS RA/Depa Finance			CSS RA / Department Finance		CSS RA / Department Finance	
100%	AZCSS	2-23456-QWERT-456789	23			02/22/14	AB
100%						02/22/14	

- 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

EID	Late Pay Required	Last End Date	Hire Action	Paper Work Completed Date	HCM entry date (HR)	Ticket #	Position #	Hire Date
CSS HR	CSS HR	CSS HR	CSS HR	CSS HR	CSS HR	CSS HR	CSS HR	Locked
2345678	No	12/31/13	New Hire	02/24/14	02/25/14	11111	12312	02/24/14
9999999	No	12/31/13	Rehire	03/23/14		33333	34567	03/23/14
7777777	No	12/31/13	New Hire			55555	56789	02/01/14

- 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

	GSAO Approved	Funding Approved	Onboarding Complete	Record Complete	Canceled	Student Email
	Locked	Locked	Locked	Locked	IF CANCELED PUT REASON IN DISCUSSION	GSAO
	03/21/14	03/22/14	03/23/14	Pending	Yes	acortes@berkeley.edu

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.

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

## Attachments

	GSAO Approved	Funding Approved	Onboarding Complete	Record Complete	Canceled	Student Email	Graduate Program
	Locked	Locked	Locked	Locked	IF CANCELED PUT REASON IN DISCUSSION	GSAO	GSAO
	02/21/14	02/22/14	02/24/14	02/25/14		jsmith123@berkeley.edu	
	02/21/14	02/22/14	02/21/14	02/25/14		jsmith123@berkeley.edu	
	03/21/14	03/22/14	03/23/14	Pending	No	acortes@berkeley.edu	

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

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

## Send Update Request

	GSAO Approved	Funding Approved	Onboarding Complete	Record Complete	Student Email	Graduate Program	Super First name
	Locked	Locked	Locked	Locked	GSAO	GSAO	GSAO
	02/21/14	02/22/14	02/24/14	02/25/14	jsmith123@berkeley.edu		Steve
	02/21/14	02/22/14	02/21/14	02/25/14	jsmith123@berkeley.edu		Rose
	03/21/14	03/22/14	03/23/14	Pending	acortes@berkeley.edu		Mary
	03/21/14	03/27/14	03/23/14	Pending	lmartin@berkeley.edu		John

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.

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

## Highlight Changes

	Approved	Approved
	02/21/14	02/22/14
	02/21/14	02/22/14
	03/21/14	03/22/14
	03/21/14	03/26/14
	03/21/14	Overdue
	Pending	Pending
	Pending	Pending

- 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.