GSI/GSR Hiring Process Training
Agenda

• Why We’re Here
• Roles and Responsibilities
• Process
• Introduction to Smartsheet
• Next Steps/Timeline
• Upcoming Communications
• Questions & Answers
Why We’re Here

• The goal is to create an effective and standardized process that responds to the needs of the stakeholders in an efficient manner
  – Clear definition of roles
  – One consistent process and tool
  – Ability to track steps in the process
# Roles & Responsibilities

## GSR/GSI Hiring process

### RACI

<table>
<thead>
<tr>
<th>Unit</th>
<th>First Manager</th>
<th>Employee (GSR/RA/SE etc.)</th>
<th>CSS PA</th>
<th>CSS First Contact Resolution Team</th>
<th>CSS Service Delivery Team A</th>
<th>CSS HRK (HCM data entry team)</th>
<th>CSS Payroll</th>
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</thead>
<tbody>
<tr>
<td>A/R</td>
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<td>A/R</td>
</tr>
</tbody>
</table>

- **Responsible:** owner of the task.
- **Accountable:** the one ultimately answerable for the correct and thorough completion of the task.
- **Consulted:** provides information and/or expertise necessary to complete the task.
- **Informed:** needs to be notified of results.
The Process

1. GSAO approves academic eligibility and sends approved appointment request
2. GSI: Fund Manager approves funding
3. GSR: CSS RA approves funding
4. Review appointment eligibility, spreadsheet, and appoint %
5. Onboarding process starts
6. HCM appointment entry
7. Payroll audit

GSR/GSI Hiring high level process
What is Smartsheet?

Smartsheet is an online excel-based work collaboration tool:
- Similar to Google Docs
- Built-in notification system
- Multiple users can be in the sheet at once
- Sign in with CalNet ID and Passphrase

URL: Smartsheet.com

**Important Note:** Do not attempt to log into the Smartsheet system until you’re notified that your access has been set up.
How to Log into Smartsheet

Scenario 1: New User

**Step 1:** If it’s your first time logging in, you will receive an email invitation. Click the link to the sheet shared with you:
How to Log into Smartsheet

Scenario 1: New User

Step 2: You will be asked to create a password. This password is a placeholder until you can sign in using your CalNet ID and passphrase:
How to Log into Smartsheet

Scenario 2: Returning User

**Step 1:** If you have logged into Smartsheet previously, go to smartsheet.com and click login:
How to Log into Smartsheet

Scenario 2: Returning User

Step 2: At the login page, enter in your email and click Continue.

Step 3: It will load another login screen. Click the Company Login button. It will then allow you to log in using your CalNet ID and passphrase.
Navigation: Within Smartsheet

Account
Change your account settings, such as the color scheme.

Settings
Click on your name to change your personal settings, including how often to auto-save.

Home
The homepage of your account; allows you to see all the sheets and workspaces you have access too.

All Sheets
Sort through all the sheets you have access to, whether they’re owned by you or shared to you.

Sheets as Tabs
Toggle between sheets you have access to without having to close them.

Open Sheets
Double-click on any sheet to open it.
Navigation: Within a Sheet

Save
Save your sheet frequently, either by clicking the save icon or CTRL+S.

Full Screen
Click on the four-arrows button to expand the sheet to full screen, allowing you to see more of the sheet at a time.

Alerts
Click Alerts to set up your own notifications and reminders, allowing you to receive emails when changes are made to specific columns.

Refresh & Viewers
Right-click on the tab to refresh, hover over the person image to see who else is viewing the sheet.
Status Columns

The Status Columns work as a quick reference to monitor appointment status:

Locked
The columns are locked and you cannot enter information into them.

Color-Coded
• Green = Done
• Pink = Pending
• Red = Overdue

Four Columns
• GSAO Approved = Date of GSAO Approval
• Funding Approved = Date of Accounting Approval
• Onboarding Complete = Date GSI/GSR’s paperwork is complete
• Record Complete = HCM Entry Date
Locked Columns

- They are denoted by grey color and marked as “Locked”.
- You cannot enter information into them.
- Cells are auto-populated based on information from other columns.
  - For example, entering in job details auto-calculates Estimated Costs

<table>
<thead>
<tr>
<th>Step</th>
<th>Appointment %</th>
<th>Begin Date</th>
<th>End Date</th>
<th>GSAO verification date</th>
<th>GSAO Name</th>
<th>Estimated Salary Costs</th>
<th>Estimated Fees Costs</th>
<th>Estimated Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSAO</td>
<td>GSAO</td>
<td>GSAO</td>
<td>GSAO</td>
<td>GSAO</td>
<td>GSAO</td>
<td>Locked</td>
<td>Locked</td>
<td>Locked</td>
</tr>
<tr>
<td>3</td>
<td>52%</td>
<td>01/01/14</td>
<td>05/31/14</td>
<td>02/21/14</td>
<td></td>
<td>$12,632.63</td>
<td>$7,817.75</td>
<td>$20,450.38</td>
</tr>
<tr>
<td>3</td>
<td>52%</td>
<td>01/01/14</td>
<td>05/31/14</td>
<td>02/21/14</td>
<td></td>
<td>$12,632.63</td>
<td>$7,817.75</td>
<td>$20,450.38</td>
</tr>
<tr>
<td>4</td>
<td>28%</td>
<td>01/01/14</td>
<td>05/31/14</td>
<td>03/21/14</td>
<td></td>
<td>$9,807.00</td>
<td>$7,482.00</td>
<td>$17,289.00</td>
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<tr>
<td>5</td>
<td>25%</td>
<td>05/06/14</td>
<td>05/30/14</td>
<td>03/21/14</td>
<td></td>
<td>$3,257.50</td>
<td>$7,482.00</td>
<td>$10,739.50</td>
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<tr>
<td>2</td>
<td>42%</td>
<td>02/01/14</td>
<td>11/30/14</td>
<td>03/21/14</td>
<td></td>
<td>$31,264.60</td>
<td>$7,482.00</td>
<td>$38,746.60</td>
</tr>
</tbody>
</table>
GSAO/Unit Initiator

- Columns GSAOs are responsible for are shown in blue and marked as “GSAO”.
- GSAOs are responsible for entering student’s personal information (Name, Email, SID, Home Dept., etc.) and job details (Job Title, Step, Appt %, Begin Date, End Date, etc.).

**Status Column Triggered:**
- Once GSAO Verification is given, “GSAO Approved” goes green, meaning it’s the RA/FA’s turn.
GSAO/Unit Initiator

Important Note: Save Frequently!

In order to prevent multiple GSAOs in the same unit from accidentally overwriting each other:

1. Type in the GSI/GSR’s name
2. Save
3. Refresh
4. Type in the rest of the appointment details
5. Save again after the appointment is entered

Frequent saving and refreshing will trigger notifications to others viewing the sheet that activity is happening.
Research Administrator/Financial Approver

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

**Status Column Triggered:**
- Once Accounting Verification is given, “Funding Approval Date” goes green, meaning it’s CSS HR/APS’s turn to take action.
CSS HR Generalists

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

Status Column Triggered:
- Once Paperwork Completed is filled out, “Onboarding Complete” goes green.
- Once HCM Entry Date is filled out, “Record Complete” goes green.
Different Views For Roles

- You will only see columns pertaining to your role, not the entire spreadsheet.
- Columns unrelated to your role will be hidden.
- Limiting column views will make your experience with the sheet faster and more efficient.
- There’s no need to scroll through entire spreadsheet in order to find the columns you are responsible for.
Cancelation/Discussions

- When an appointment is canceled, select **Yes** in **Canceled** column in order to strike out entire row.
- If you cancel a row, you must put a reason in the **Chat/discussion** section.
Cancelation/Discussions (Cont.)

- The Discussion column is denoted by a chatbox image.
  - If a chatbox is shown in the a row, then there is a discussion for that appointment/row.
  - If a chatbox is not shown in a row, then there is no discussion for that appointment/row.
- Click the chatbox image in the appropriate row.
- Click “New Discussion” (or on an appropriate existing discussion, if applicable) and enter in details of cancelation.
Cancelation/Discussions (Cont.)

- Discussions similar to form-style chats
- All discussions are stamped with name, time, and date
- Multiple people can participate in one discussion
- Discussions can be emailed, printed, edited, and deleted
Attachments

- The Attachments column is denoted by a paperclip image.
  - If a paperclip is shown in the a row, then there is an attachment for that appointment/row.
  - If a paperclip is not shown in a row, then there is no attachment for that appointment/row.
- Click the paperclip image in the appropriate row to upload an attachment.
Attachments (Cont.)

- Attachments can be uploaded from your computer or attached from Google Drive, Box, or from a URL.
- Attachments are stamped with name, time, and date.
- 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. This would be useful for gaining external funding approval.

**Step 1:** Hover over the column in the row you want to request an update on and click the envelope image that appears.
Alternatively, you can right click the row, **Row Actions > Send Update Request**.

**Step 2:** Input the email of the party that you want to update the row and click **Send**.
Send Update Request (Cont.)

Step 3: The party will receive an email requesting an update. When they click **Update Rows**, Smartsheet will open.

Step 4: The party will then update the row and click **Send Changes**. (They will have access to change information only in that row.)
Send Update Request (Cont.)

**Step 5:** Once the party has updated the rows, you will receive a notification email, and all of the changes that the party made will be highlighted in yellow.

Smartsheet will automatically be updated with the change. No further action from you is required.
Highlight Changes

• You can choose to turn on the Highlight Changes feature by clicking the highlighter image in the left sidebar.

• You can customize the highlighted changes, choosing to show changes made within the hour, day, week, etc.
Cell History

• You can see the history of every change made in any cell simply by right-clicking the cell and choosing View History...

• All changes are name, time, and date stamped.

• This feature would be useful when comparing chartstring changes, for example.
Best Practices

• Log out of Smartsheet after every session
• Save and refresh often
• Make sure to check rows for discussions and attachments
What’s Next:

- 4/4: Current Excel spreadsheets will be locked.
- 4/6: CSS will create Smartsheet for each dept and set-up access.
- 4/7-8: CSS HR/APS will transfer data from existing spreadsheets to Smartsheet.
- 4/14 – 30: Learning Labs
Communications

Next Week:

• Notification of when your Smartsheet access is set-up
• Go Live communication
• Updates regarding training videos, additional resources, FAQs, etc.
• Details regarding Learning Labs
Contact Information

Please work with your CSS HR/APS Service Delivery staff regarding any questions, troubleshooting, etc.
Questions?