Human Resources
UNIVERSITY OF COLORADO
ANSCHUTZ MEDICAL CAMPUS

University Staff & Classified Guide

HRBP Guide

Smartsheet: Dynamic View & Transaction Status Guide

Smartsheet: Dynamic View & Transaction Status Guide:

This guide will provide an overview of how to track your Smartsheet requests using Dynamic View and how to interpret the status of your request based on the "Current Status" field.

For instructions on how to submit a request for the following, please visit the **Smartsheet Resources: University Staff & State Classified** landing page – **LINK.**

- Position Management changes
- Searches
- Additional Hires (Appointment type #1)
- Promotions (Update w/ Increase and In-Range)
- Updates Only

Additional Resources:
If you need additional system support or have questions that are not currently covered in this guide, please contact your Central HR Classification and/or Talent Acquisition consultant or the technical support Smartsheet Support Team below:

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Dynamic View & Transaction Status Guide

Accessing Dynamic View:

After entering a request using the Transaction Center, HRBPs can track the status of individual transactions using Smartsheet: Dynamic View. For ease, (4) distinct Dynamic Views have been established to mirror the (4) types of transactions that can be entered using the Transaction Center: **Position Management, Search or Hire (Apt Type #1), Salary Adjustment or Promotion, and Update Only.**

	Position Management https://dynamicview.smartsheet.com/views/af34c3b9-0372-46de-a039-5319300e5bec
	Search or Hire (Appointment Type 1) https://dynamicview.smartsheet.com/views/fef5f6e2-a13a-4a4c-9e3b-39d6ce9025b5
	Salary Adjustments & Promotions https://dynamicview.smartsheet.com/views/d21913e3-8313-44d4-8bae-130b1ed418e9
	Update Only https://dynamicview.smartsheet.com/views/977f8fbc-d2ae-4114-933a-76e9f2d999b0

Transaction Status:

Through this new process, HRBPs can also actively track the progress of ongoing University Staff and Classified requests. The grid below provides an overview of the different "transaction status" updates and what they mean.

Process Steps	Transaction Status(es)	Meaning
Transaction Entered ✉	**Submitted by HRBP –** Routed to Specialist **Submitted by HRBP –** Routed to Classification **Submitted by HRBP –** Routed to Talent Acquisition	Once a request has been entered, it will be routed through an automated workflow and assigned based on the type of transaction requested. The transaction status confirms which member of Central HR has received your request for review/approval (i.e., an HR Specialist, your Classification Consultant, or your Talent Acquisition Consultant). A notification should be received from the Smartsheet System after every transaction entry. *A service account has been established. Position Management Request:* position.management@cuanschutz.edu
Questions/More Information Needed	**Specialist** working with **HRBP** **Classification** working with **HRBP** **Talent Acquisition** working with **HBRP** **Compensation** working with **HBRP**	If questions arise or more information/documentation is required, your request will be moved into one of these statuses. The appropriate contact (Specialist, Classification, Talent Acquisition, or Compensation) will email the HRBP, outside the Smartsheet workflow, with more details. *The "Compensation working with HRBP" would be reserved for Salary Adjustment or Promotion requests.*

Questions Addressed/More Information Provided	**Specialist** received update from **HRBP** **Classification** received update from **HRBP** **Talent Acquisition** received update from **HBRP** **Compensation** received update from **HBRP**	After questions are addressed, or more information/documentation is provided, your request will be moved into one of these statuses. The appropriate contact (Specialist, Classification, Talent Acquisition, or Compensation) will then take action to finish approving your request.
Routing	**Specialist reviewed** - Routed to **Classification** **Classification reviewed** - Routed to **Talent Acq** **Classification reviewed** - Routed to **Compensation** **Classification reviewed** - Routed to **SOM Compensation** **Compensation/SOM Compensation approved –** Routed to Classification *For promotions, HRBP will receive an update from Classification with the approved rate/range.*	Depending on the nature of the request, multiple members of the Central HR Team may be involved in the review and approval process *(please see process flow charts for more detail).* This status allows HRBPs to see where their request stands and who to reach out to if they have questions. Quick Reference Guide Specialist Reviewed – Routed to Classification **(*used for Position Management)** Classification reviewed - Routed to Talent Acq **(*used for Searches)** Classification reviewed - Routed to Compensation/SOM Compensation **(*used for Salary Adjustments & Promotions)** Compensation/SOM Compensation approved - Routed to Classified **(*used for specific Salary Adjustments & Promotions)**

Transaction Approved ✉	**Finalized: Position Management** - Uploaded into HCM	Once your request has been fully processed/approved, the transaction will be moved into one of these statuses.
	Finalized: Search - Posted to CU Careers	This status confirms that all relevant HCM and/or CU Career entries have been completed.
	Finalized: Hire (Apt Type 1) - Uploaded into HCM	After every transaction is approved, a notification should be received from Smartsheets.
	Finalized: Update Only - Uploaded into HCM	
	Finalized: Salary Adjustment or Promotion - Uploaded into HCM	
Transaction Rejected ✉	**Specialist rejected** - Routed to **HRBP**	If your request has been denied/rejected, the transaction will be moved into one of these statuses.
	Classification rejected - Routed to **HRBP**	This status indicates which member of Central HR formally denied the request and can be contacted for more information.
	Talent Acq rejected - Routed to **HRBP**	A notification should be received from the Smartsheet System whenever a request is denied.
	Compensation/SOM Compensation rejected - Routed to **HRBP**	