

University Staff & Classified Guide

HRBP Guide

Smartsheet: Dynamic View & Transaction Status Guide

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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.

Additional guidance and support resources, including how to track your requests using Smartsheet: Dynamic View and/or how to interpret the status of your request based on the “Current Status” field can be found on the [Smartsheet Resources: University Staff & State Classified](#) landing page.

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

Additional Resources:


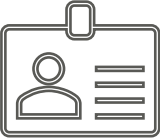


If you need additional system support or have questions that are not currently covered in this guide, please contact your Central HR Classification and/or Talent Acquisition consultant or the technical support Smartsheet Support Team below:

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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://app.smartsheet.com/dynamicview/views/5e47a234-9c7c-4ee2-bf83-979ddb3c87b4
	Search or Hire (Appointment Type 1) https://app.smartsheet.com/dynamicview/views/244c7990-2781-430e-9136-93ace9e082e0
	Salary Adjustments & Promotions https://app.smartsheet.com/dynamicview/views/39eeec6d-4267-4287-8c94-efb95455255b
	Update Only https://app.smartsheet.com/dynamicview/views/9dfde98a-a9a4-4f87-84be-edfad6f3de48

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
<p data-bbox="155 352 337 422">Transaction Entered</p> 	<p data-bbox="441 317 773 386">Submitted by HRBP – Routed to Specialist</p> <p data-bbox="441 422 777 491">Submitted by HRBP – Routed to Classification</p> <p data-bbox="441 527 841 596">Submitted by HRBP – Routed to Talent Acquisition</p>	<p data-bbox="907 317 1471 470">Once a request has been entered, it will be routed through an automated workflow and assigned based on the type of transaction requested.</p> <p data-bbox="907 499 1442 730">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).</p> <p data-bbox="907 760 1442 869">A notification should be received from the Smartsheet System after every transaction entry.</p> <p data-bbox="907 898 1471 1052">*A service account has been established. Position Management Request: <i>position.management@cuanschutz.edu</i></p>
<p data-bbox="155 1108 399 1220">Questions/More Information Needed</p>	<p data-bbox="441 1108 873 1142">Specialist working with HRBP</p> <p data-bbox="441 1171 834 1241">Classification working with HRBP</p> <p data-bbox="441 1270 837 1339">Talent Acquisition working with HBRP</p> <p data-bbox="441 1369 847 1438">Compensation working with HBRP</p>	<p data-bbox="907 1108 1450 1255">If questions arise or more information/documentation is required, your request will be moved into one of these statuses.</p> <p data-bbox="907 1285 1446 1474">The appropriate contact (Specialist, Classification, Talent Acquisition, or Compensation) will email the HRBP, outside the Smartsheet workflow, with more details.</p> <p data-bbox="907 1503 1463 1619">*The “Compensation working with HRBP” would be reserved for Salary Adjustment or Promotion requests.</p>

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

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