Employee Relations & Compliance

Find it online: smartsheet.com/hr-solutions/employee-relations-compliance
About Employee Relations & Compliance

Successful businesses know how to manage employee relations to retain their best people. This means consistently listening to concerns and providing managers with the tools and processes that ensure employees are performing at their highest level. It also means proactively managing compliance risk and standardizing the employee offboarding and termination processes. This guide is built to show you how to use Smartsheet to achieve your Employee Relations and Compliance goals.

Increase employee satisfaction
Provide the tools and processes needed to ensure employee concerns are captured, tracked and resolved.

Stay on top of risk and compliance needs
Capture and track risk and compliance activities in a central location so that HR leaders and Executives are consistently informed and on the same page.

Standardize offboarding and termination processes
Provide managers with the checklists that ensure all employees have a consistent experience when they leave.
Who should use this guide

As individuals responsible for coaching, guiding and ensuring your organization stays on track with defined policies and procedures, this guide will provide the necessary support you need to keep everyone informed. Common roles/titles who would benefit from this solution include:

- HR Assistant
- HR Generalist
- HR Director
- Benefits Manager
- HR Supervisor
- HR Coordinator
- HR Consultant
- HR Manager
- HR Business Partner
- HR Associate
- Recruiting Coordinator
- Diversity Manager

Purpose

This guide provides the knowledge and know-how to help keep your team updated with the information they need to perform their jobs at the highest level. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets
Components

1. EMPOWER
   - New Manager Onboarding Guide
   - Provide new managers the tools they need to support employees.

2. MANAGE
   - Employee Concerns Tracker
   - Risk Management Checklist
   - Compliance Checklist
   - Keep track of all issues, risks and regulatory requirements.

3. OFFBOARD
   - Termination Checklist
   - Employee Offboarding
   - Ensure employee exits are and efficient, as well as positive experience.
**New Manager Onboarding Guide**

The best individual contributors are not naturally the best managers. A consistent set of training tools to on-board new managers ensures their long-term success and contribution to the organization. Smartsheet’s New Manager Onboarding template helps create a customized plan that ensures all managers have the necessary training they need to bring new employees into the organization with the best experience possible.

- Use symbols to help hone in on the most important onboarding activities.
- Set up automatic reminders to ensure new managers don’t miss important training activities or key onboarding meetings.
- Check off tasks as they get completed so nothing gets missed.
- Use drop-down lists to specify frequency for tasks that need to happen periodically, like assessing team skills or going over career development plans.
Compliance Checklist

Without a central place to manage all compliance related activities, important tasks can get missed, exposing your company to compliance risk. Smartsheet’s Compliance Checklist helps you keep all activities accounted for, including a history of when they were marked complete and, if applicable, who made changes to specific compliance activities and when.

A. Have discussions with HR stakeholders or executives if they have questions about the status of a particular compliance activity.

B. Use symbols to visually signal that a compliance task has been completed.

C. Turn on highlight changes to see what changed since you last viewed the list.

D. Set up automatic alerts that email the owner of a task as reminders to update task status and other information.

E. View cell history to see a log of what changed and who made the changes.
Risk Management

Every company has risks. But oftentimes they get tracked on emails, in documents, or even on sheets of paper. As a result, the risk management team and other involved executives lack visibility into all of the risks the company may face. Smartsheet’s Risk Management template helps organizations identify, capture and track any potential risk, as well as ensure the necessary collaboration is taking place to mitigate them.
Employee Concerns Tracker

While being responsive to employee concerns is critical, it can be challenging to log and track every single concern until they’re resolved. The Smartsheet Employee Concerns Tracker allows you to capture, track and resolve employee-related concerns, building a positive work environment, and reducing your liability risk.

A. Set up reminders based on follow-up dates so that task owners stay on track.

B. Track issue status and enable conditional formatting to de-emphasize resolved issues.

C. Set up reports in an Excel or PDF format and automatically send them to executives on a periodic basis.

D. Use web forms to allow employees to record issues without accessing the entire sheet.
Termination Checklist

Although terminations can bring significant risk, many companies lack a standardized way of making sure terminations are handled appropriately and consistently every time. Smartsheet’s Termination Checklist helps you cover all of the necessary steps on each employee exit with managers, outgoing employees and appropriate administrative personnel, mitigating risk and creating a consistent, professional, termination experience.

- Store relevant termination documents directly in your checklist.
- Use row hierarchy to organize termination related tasks into high level categories.
- Use discussions to clarify any questions managers might have about the termination process.
- Set up automatic reminders for managers so they are alerted before termination activities are due.
- Use symbols like Red, Yellow, Green (RYG) balls to easily visualize task status.
Employee Offboarding

Employee offboarding can be a difficult game of remembering what needs to get done, by whom, and when. One hold-up can cause a bad experience for the employee, or cause important approvals and sign-offs to be rushed. Smartsheet’s Employee Offboarding template helps HR build a pre-defined checklist of activities used for all exiting employees to ensure business continuity and compliance enforcement, creating a positive experience for both the manager and the employee.

A. Remind outgoing employees when critical offboarding tasks become due.

B. Use the check box column to signal that a task has been completed.

C. Capture information that is critical for business continuity.

D. Use the calendar view to get a visual sense of how the different offboarding tasks line up.
Jump-Start Your Employee Relations & Compliance Efforts with Smartsheet

- **Read through the solution guide**
  You’ve had an overview of the solution – now try Smartsheet for yourself.

- **Sign up or log in to Smartsheet**
  Sign up at smartsheet.com/hr-solutions/employee-relations-compliance. You can also use this with your existing account by logging in.

- **Open the Getting Started Sheet**
  Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

- **Customize the sheet**
  The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

- **Start working and sharing**
  To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
Other Recommended Steps

1. **Delete sheets you don't need**
   - Deleting a sheet is easy! You can learn how to [here](#).

2. **Build your own sheet**
   - We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.

3. **Use the “cheat sheets” in this guide**
   - To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.
Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - help.smartsheet.com
   Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - community.smartsheet.com
   Ask questions, share best practices, and get help.

**Submit your question** - solutions@smartsheet.com
   Want personalized help? Our design and services teams have you covered!

**Send us your feedback** - help.smartsheet.com/customer/portal/emails/new
   Share your thoughts or suggestions about Smartsheet or our Solutions.

**Plans and Pricing** - smartsheet.com/pricing
   Enjoy your 30-day free trial.
Smartsheet Cheat Sheet

Keyboard Shortcuts

**Basics**

- **Enter mode** on selected cell
  - **F2 / Fn + F2**

- **Saves all unsaved information**
  - **Ctrl + S**

- **Undo the previous action since last save**
  - **Ctrl + Z**

- **Redo the previous action since last save**
  - **Ctrl + Y**

- **Inserts a row above the selected row.**
  - **Ins**

To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins**.

**Formatting**

- **Inserts a carriage return or line break in Text Number cells.** In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.
  - **Ctrl + Enter**
  - **(or)**
  - **Alt + Enter**

- **Indents Primary Column only**
  - **Ctrl + K**

- **Outdents Primary Column only**
  - **Ctrl + M**

- **Italic**
  - **Ctrl + I**

- **Bold**
  - **Ctrl + B**

- **Underline**
  - **Ctrl + U**

**NOTE:** Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.
Formulas

- \( \text{Ctrl} + \text{L} \times 1 \): Inserts \$ before column name (horizontal cell reference lock).
- \( \times 2 \): Inserts \$ after column name (vertical cell reference lock).
- \( \times 3 \): Inserts \$'s around column name (full cell reference lock).

Date Column Cells

- \( t \): Inserts today’s date.
- \( + \): Enters date x days from today.
- \( - \): Enters date x days before today.
- \( \text{mon} / \text{tue} / \text{wed} / \) etc...: Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.
- \( \text{yes} \): Inserts yesterday’s date.
- \( \text{tom} \): Inserts tomorrow’s date.
- \( \text{next week} \): Inserts date seven days from today.
- \( \text{last week} \): Inserts date from seven days ago.
- \( \text{Dec 15 / Jan 3 /} \) etc: Inserts date of string entered.

Additional

- \( \text{Ctrl} + / \): Displays the Open a Sheet form.
- \( \text{Ctrl} + G \): Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- \( \text{Ctrl} + \text{Home} \): Takes you to the first cell of the row you are currently on.
- \( \text{Ctrl} + \text{End} \): Takes you to the last cell of the row you are currently on.
- \( \text{Pg Up} \): Moves you up in your sheet.
- \( \text{Pg Dn} \): Moves you down in your sheet.
- \( \text{Space} \): Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article.
**Numeric Formulas**

- **SUM():** Adds selected values, or a range of cells.
  - Example: =SUM(Cost1: Cost5)
  - Result: 1125.75

- **AVG():** Averages selected values, or a range of cells.
  - Example: =AVG(Cost1: Cost5)
  - Result: 225.15

- **MAX():** Returns the highest numeric value, or latest date.
  - Example: =MAX(Cost1: Cost5)
  - Result: 425.75

- **MIN():** Returns the lowest numeric value, or earliest date.
  - Example: =MIN(Cost1: Cost5)
  - Result: 100

- **INT():** Returns the integer portion of a given number.
  - Example: =INT(Cost5)
  - Result: 425

- **ROUND():** Rounds a given number to the desired # of digits.
  - Syntax: ROUND(cell1, #_of_digits)
  - Example: =ROUND(Cost5, 1)
  - Result: 425.8

- **ABS():** Returns the absolute value of a given number.
  - Example: =ABS(-85)
  - Result: 85

- **COUNT():** Counts non-blank cells in a given range.
  - Example: =COUNT([Task Name]:[Task Name])
  - Result: 5

- **LEN():** Returns the number of characters (length) in a given cell.
  - Example: =LEN([Task Name])
  - Result: 6
  - NOTE: Formatting/currency values aren’t included. Dates have a length of 5.
## Logic Formulas

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Syntax</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IF()</strong></td>
<td>Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.</td>
<td>( \text{IF} ){logical_test, value_if_true, value_if_false}</td>
<td>=IF([Due Date]1 &gt; [Due Date]2, “Date 1 is Larger”, “Date 2 is Larger”)</td>
<td>Date 2 is Larger</td>
</tr>
<tr>
<td><strong>ISBLANK()</strong></td>
<td>Used within an IF formula to test if a cell is blank.</td>
<td>=IF(ISBLANK([Task Name]1), “Cell is blank”, “Cell isn’t blank”)</td>
<td></td>
<td>Cell isn’t blank</td>
</tr>
<tr>
<td><strong>ISTEXT()</strong></td>
<td>Used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).</td>
<td>=IF(ISTEXT([Due Date]1), “Cell is text”, “Cell isn’t text”)</td>
<td></td>
<td>Cell isn’t text</td>
</tr>
<tr>
<td><strong>ISNUMBER()</strong></td>
<td>Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).</td>
<td>=IF(ISNUMBER([Task Name]1), “Cell is a number”, “Cell isn’t a number”)</td>
<td></td>
<td>Cell isn’t a number</td>
</tr>
<tr>
<td><strong>ISDATE()</strong></td>
<td>Used in an IF formula to test if a cell contains a date.</td>
<td>=IF(ISDATE([Due Date]1), “Cell is a date”, “Cell isn’t a date”)</td>
<td></td>
<td>Cell is a date</td>
</tr>
<tr>
<td><strong>ISBOOLEAN()</strong></td>
<td>Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).</td>
<td>=IF(ISBOOLEAN(Done1), “Cell is a boolean”, “Cell isn’t a boolean”)</td>
<td></td>
<td>Cell is a Boolean</td>
</tr>
</tbody>
</table>
Logic Formulas (cont.)

**AND()**: Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

- **Syntax**: `AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)`
- **Example**: `=IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")`
- **Result**: Tasks Incomplete

**NOT()**: Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

- **Syntax**: `NOT(Done1)`
- **Example**: `=IF(NOT(Done1), "Task A Not Complete", "Task A Complete")`
- **Result**: Task A Complete

**OR()**: Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

- **Syntax**: `OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)`
- **Example**: `=IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")`
- **Result**: Due Date 1 is the smallest

**NESTED IF()**: Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

- **Syntax**: `IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))`
- **Example**: `=IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))`
- **Result**: This is Task A
Additional Formulas and Help

**Formula Basics** - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas** - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

**Date Formulas** - smartsheet.com/date-formulas
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas** - smartsheet.com/date-formulas
Weighted average, prorate, countif, countif s, sumif, sumif s

**Using Hierarchy in Formulas** - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

**Formula Error Messages** - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot
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