Recruiting & Talent Acquisition

Find it online: smartsheet.com/hr-solutions/recruiting-talent-acquisition
About Recruiting & Talent Acquisition

Bringing in the best and brightest employees into an organization is one of the most difficult – and most rewarding - aspects of an HR role. Regardless of the kind of talent you need to find, having the tools to proactively engage with a variety of teams, organizations, and vendors can save you countless hours in keeping up with the many positions you have to fill. This guide is built to show you how to use Smartsheet to achieve your Recruiting & Talent Acquisition goals.

Maximize ROI on recruiting activities
Smartsheet’s Recruiting Plan helps you prioritize and stay on top of recruiting events so that you get the biggest bang for your buck.

Stay on top of recruiting budget
Use Smartsheet’s budget manager to allocate budget to the most important recruiting activities and then track actual spend over the fiscal year.

Create a positive experience for candidates
Ensure candidates have a lasting, positive impression, as you work with them through the process.
Who should use this guide

Whether your role owns end-to-end recruiting for all talent or if you’re responsible for supporting managers with their recruiting efforts, this guide will provide the essential information and tools you need. Common roles/titles who would benefit from this solution include:

- HR Assistant
- Recruiter
- Executive Recruiter
- HR Manager
- Technical Recruiter
- HR Coordinator
- HR Consultant
- HR Business Partner
- HR Associate
- Recruiting Coordinator
- Diversity Manager

Purpose

This guide walks you through a step-by-step process to help you manage your job, stay on track, and stay within budget. 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
Stay on top of recruiting goals by using your resources and time in the areas that matter most.

Stay prepared for budget reviews and new budget discussions.

Deliver a great experience to candidates and new employees.
Recruiting Plan

Building a great recruiting plan means tracking tens if not hundreds of activities, each with separate owners, follow-up dates, and deadlines. Smartsheet’s Recruiting Plan template helps you organize all the recruiting activities you need to target key candidates, reach your hiring goals, and ensure you’re aligned with management on company priorities.

- **A** Send automatic email notifications when the status of hiring activities change.
- **B** Use hierarchy to group recruiting activities by source.
- **C** Turn on the ‘Highlight Change’ feature to see changes to information within the sheet.
- **D** Toggle to Gantt chart view to visualize how different recruiting events line up.
- **E** Publish the recruiting sheet to an internal web page so the HR team and hiring managers have a real-time view into status of recruiting activities.
Requisition Tracker

Managing requisitions can often feel like juggling too many balls in the air. New requisitions (REQs) get added on a daily basis while current REQs get constantly changed. It can be difficult to keep up with these changes and additions while at the same time keeping the hiring managers informed on status of their positions. Smartsheet’s Requisition Tracker gives you one place to manage all of your REQs, including information for all candidates who’ve applied, detailed information about the role, and hiring manager notes.

- Attach job descriptions and resumes directly to the tracker sheet.
- Use discussions to document next steps and share information with hiring managers.
- Visually convey status of the requisition using Red, Yellow, Green (RYG) balls.
- Send specific rows to hiring managers and stakeholders in HR to keep them informed on the status of requisitions.
Budget Manager

Without a budget tracking tool in place, coming up with insights into where spend is going and its impact can take weeks of research and planning. Smartsheet’s Budget Manager provides ability to track your spend on an ongoing basis, prepare for year-over-year reviews and build justification for additional budget.

- Flag budget items that need special attention.
- Organize budget items into high level categories using Row Hierarchy.
- Share your budget with the HR team while controlling the level of access.
- Roll-up budget numbers easily using formulas.
- Send update requests to get team members to update information as necessary or ensure actuals are accurate.
Candidate Screening

Managing an efficient candidate screening process means staying on top of lots of details - candidate resumes, changing job descriptions, interviewer feedback, coordinating next steps, and more. Smartsheet’s Candidate Screening template helps you manage the candidate screening process while also centralizing the information you and your hiring managers need to determine whether a candidate is the right fit for your organization.

A. Attach candidate resumes to keep all hiring information in one secure place.

B. Check off completed applications to remove them from the hiring manager’s queue.

C. Set alerts to update hiring managers on change in status of candidate applications.

D. Share the sheet with hiring managers and the broader HR team while also controlling the level of access.

E. Record the quality of candidate responses and use symbols to indicate candidate competency.
New Hire Checklist

While everyone would agree that it’s important to make sure new hires have the information and tools they need to get up and running quickly, pre-start activities can often get de-prioritized in the shuffle. Smartsheet’s New Hire checklist ensures that all necessary tasks are completed before a new employee’s start date, and that they have the information and tools they need to be productive on day one.

- Attach documents like employee resumes and offer letters to keep all relevant onboarding documents in one place.
- Use symbols like RYG balls to visually track the status of each new employee document.
- Discuss the status of new hire related activities, like missing documentation or payout of referral bonus, directly in each row.
- Leverage checkbox columns to track progress over the onboarding process.

Recruiting & Talent Acquisition Solution Guide
Jump-Start Your Recruiting and Talent Acquisition with Smartsheet

<table>
<thead>
<tr>
<th>Task</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read through the solution guide</td>
<td>You’ve had an overview of the solution – now try Smartsheet for yourself.</td>
</tr>
<tr>
<td>Sign up or log in to Smartsheet</td>
<td>Sign up at <a href="http://smartsheet.com/hr-solutions/recruiting-talent-acquisition">smartsheet.com/hr-solutions/recruiting-talent-acquisition</a>. You can also use this with your existing account by logging in.</td>
</tr>
<tr>
<td>Open the Getting Started Sheet</td>
<td>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.</td>
</tr>
<tr>
<td>Customize the sheet</td>
<td>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.</td>
</tr>
<tr>
<td>Start working and sharing</td>
<td>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.</td>
</tr>
</tbody>
</table>
Other Recommended Steps

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

- **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.

- **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

- **F2 / Fn + F2**
  - Enters edit mode on selected cell
- **Ctrl + S**
  - Saves all unsaved information
- **Ctrl + Z**
  - Undoes the previous action since last save
- **Ctrl + Y**
  - Redoes the previous action since last save
- **Ins**
  - Inserts a row above the selected row.

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

Formatting

- **Ctrl + Enter** (or) **Alt + Enter**
  - 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 + K**
  - Indents Primary Column only
- **Ctrl + M**
  - Outdents Primary Column only
- **Ctrl + I**
  - Italic
- **Ctrl + B**
  - Bold
- **Ctrl + U**
  - Underline

**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).
- \( \text{Ctrl} + \text{L} \times 2 \): Inserts $ after column name (vertical cell reference lock).
- \( \text{Ctrl} + \text{L} \times 3 \): 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.
- \( \text{mon} / \text{tue} / \text{wed} / \text{etc}... \): 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.
- \( \text{Dec 15} / \text{Jan 3} / \text{etc} \): 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 top left cell of your sheet.
- \( \text{Ctrl} + \text{End} \): Takes you to the bottom right cell of your sheet.
- \( \text{Pg Up} \): 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]5)
  
  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 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><code>=IF([Due Date]1 &gt; [Due Date]2, “Date 1 is Larger”, “Date 2 is Larger”)</code></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><code>=IF(ISBLANK([Task Name]1), “Cell is blank”, “Cell isn’t blank”)</code></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><code>=IF(ISTEXT([Due Date]1), “Cell is text”, “Cell isn’t text”)</code></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><code>=IF(ISNUMBER([Task Name]1), “Cell is a number”, “Cell isn’t a number”)</code></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><code>=IF(ISDATE([Due Date]1), “Cell is a date”, “Cell isn’t a date”)</code></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><code>=IF(ISBOOLEAN([Done]1), “Cell is a boolean”, “Cell isn’t a boolean”)</code></td>
<td>Cell is a Boolean</td>
</tr>
</tbody>
</table>
Smartsheet Cheat Sheet

Formulas

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(boolean_expression)`
- **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(boolean_expression1, boolean_expression2, boolean_expression3)`
- **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/formula-basics
TODAY() formula, calculating working days, creating dates, etc

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

**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