

1. Using E-TRAC

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1.1. Pre-requisites

Before you begin using E-TRAC you should have a working knowledge of your computer and its operating system. Make sure you know how to use your mouse, standard menus and commands, and how to open, save, and close your transactions. Working in E-TRAC is slightly different than working in most browsers.

1.2. System Requirements

For the campus community, where performance and reliability are important, Internet Explorer 5, 5.5, or 6 are the recommended web browsers running on Windows NT 2000, or XP.

Human Resources Management Systems (HRMS)/ E-TRAC functions best on the following web browser and client operating systems combinations:

- Netscape Navigator 6.2x on Windows XP
- Netscape Communicator 4.72 on Mac OS 7.6.1 and above
- MS Internet Explorer 7 on Windows XP
- MS Internet Explorer 5 on Mac OS 7.5 and above

1.3. The E-TRAC Home Page

The E-TRAC home page is accessed by all E-TRAC users.

The E-TRAC home page is located by navigating the following path: **SFO Self Service > E-TRAC > E-TRAC Home > E-TRAC Home.**

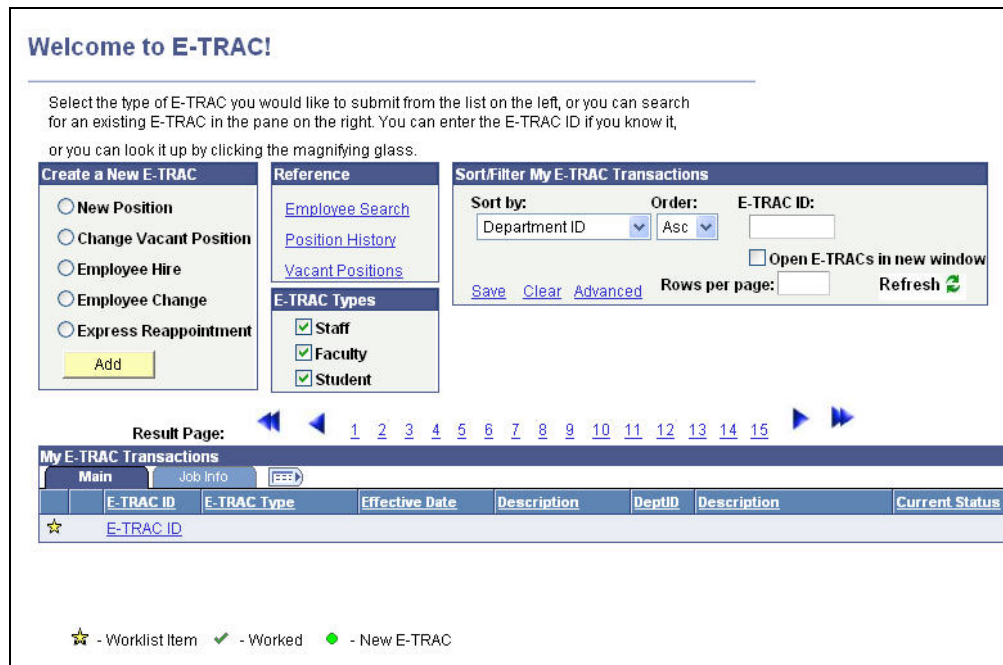


Figure 1-1 E-TRAC home page

The E-TRAC home page is divided into five sections:

- **Create a New E-TRAC**
Use this section to create a new transaction.
- **Reference**
Use this section to perform employee and position searches in the system.
- **E-TRAC Types**
Based on user security, use this section to control the view of staff, faculty or student E-TRAC transactions only. E-TRAC Types sorts the job code in your worklist by faculty, staff, or students. You may select all or select only one option.
- **Sort My E-TRAC Transactions**
Use this section to adjust your view of E-TRAC transactions or to quickly locate an E-TRAC transaction. Various sort criteria are available to select in the Sort By field. Also, department filters can be applied to view only the transactions for certain departments. The Only show My E-TRACs filter will only display the E-TRACs that you have saved, submitted, approved or that are awaiting your approval. The Include Completed checkbox can be selected to view all E-TRACs for your department, including those that have been fully approved by Human Resources. Finally, there is also a quick search by E-TRAC ID that is available in order to quickly locate a specific E-TRAC by number.

- **My E-TRAC Transactions**

Use the section in conjunction with the sort function to quickly locate your E-TRAC transactions. There are three types of transactions that will appear on the My E-TRAC Transactions list as indicated by the symbols on the key at the bottom of the page.

- **Worklist Item**

Transaction that needs to be reviewed and approved. Worklist items are indicated by the gold star symbol.

- **Worked**

Transaction that has been submitted, approved or rejected. Worked transactions are indicated by the green checkmark. Pay attention to the current status to identify the last approver who approved the transaction.

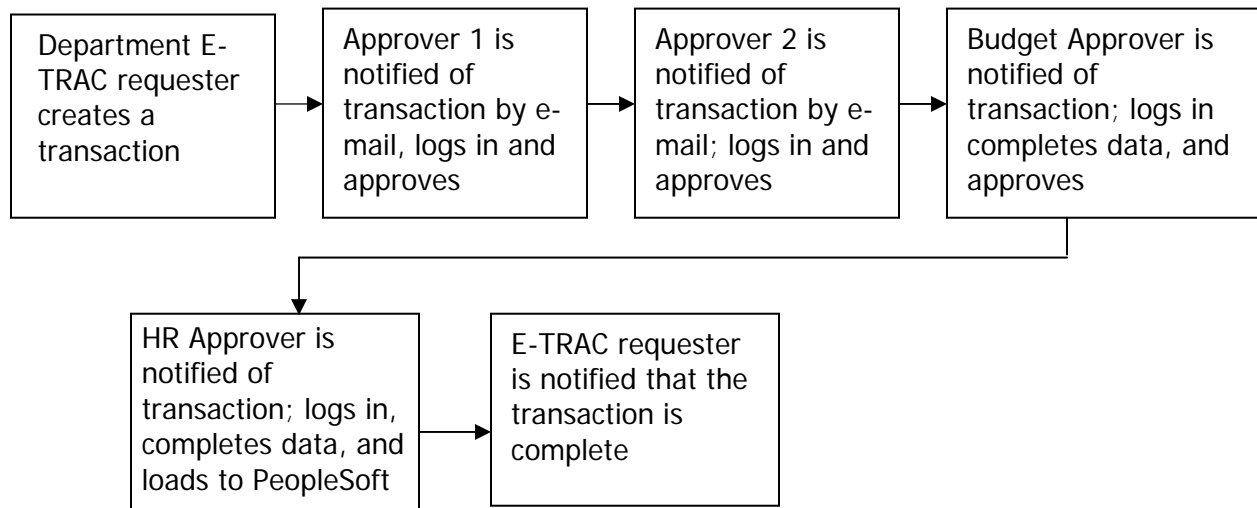
- **New E-TRAC**

Transaction that a requester has saved but not yet submitted for approval. New E-TRACs are indicated by the green circle

1.3.1. High Level Features of E-TRAC

- Approval is an electronic signature
- Electronically submit transactions that were previously on paper
- Receive e-mail updates of subsequent changes to transactions
- Special notes or instructions can be added to a transaction
- Data is validated immediately to avoid reworking later
- E-TRAC maintains data of who is authorized to approve transactions in each department
- Approvers are automatically notified by e-mail when a new transaction is pending approval
- A history of your transactions is maintained by the system
- Items you have approved can be easily located through the E-TRAC home page
- Open work items awaiting approval are also tracked through the E-TRAC home page
- E-mail reminders are issued after five days if a transaction has not been approved or rejected

The flow chart below illustrates the E-TRAC process at a high level. Note that the number of approvals for transactions in your department may vary.



1.4. Online Help

At any point when you are working on your E-TRAC transaction you can click the help link to access the online help file. All the information that is in the user guides is in the help file. You can navigate the topics through the topics pane or by using the links in the topics pages.

1.5. E-mail Notifications

All E-TRAC creators and approvers will receive an e-mail notification stating that an E-TRAC transaction is pending approval in their worklist.

E-TRAC requesters will receive e-mail messages at several stages of the E-TRAC process updating the requester on the status of a transaction. E-mails will be generated based on the following conditions:

- When the transaction has been submitted successfully—the e-mail will also contain the E-TRAC ID number for the transaction.
- When a subsequent approver makes any changes or updates to a transaction that has been submitted—the e-mail will indicate the changes that were made.
- When the transaction is rejected by an approver.
- When the E-TRAC has been approved and loaded into the Human Resources system—the e-mail will notify the requester of the transaction's full completion.

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-----Original Message-----
From: H8SFTST@calstate.edu [mailto:H8SFTST@calstate.edu]
Sent: Thursday, September 25, 2003 2:09 PM
To: etracuser@sfsu.edu
Subject: E-TRAC #00000076 has been fully approved

This email is to notify you that E-TRAC number 00000076 requesting a
Employee Change for Department 6115; has been approved by HR and loaded into
the HR system.

Please follow the link to log into E-TRAC.

https://cmsdev.calstate.edu:4196/servlets/iclientservlet/h8sftst/?ICType=Pan
el&menu=SFO_ROLE_MANAGER&market=GBL&panelGroupName=SFO_ETRAC_ECH&SFO_ETRAC_I
D=00000076

-----
This e-mail message brought to you by E-TRAC workflow technology.

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Figure 1-2 Sample e-mail

1.6. Vacant Positions Inquiry

As part of your E-TRAC security profile, you will have access to view your department's vacant positions and position history online. This will allow you to familiarize yourself with the vacant positions, learn the properties of various positions and maintain their data elements.

The **Vacant Positions** inquiry is a departmental view of vacant positions or positions that do not have an incumbent. This inquiry functions like an online report and is available from the **E-TRAC Home** page. It is important to run this query prior to requesting a new position to ensure that a position that fits your needs does not already exist in the database.

Search Criteria	Use
Begins with	Search by an initial letter or number
Contains	Search by a group of characters
=	Search by using an exact set of characters (alphanumeric)
Not =	Search by excluding an exact set of characters
<	Search numbers that are less than the number entered
<=	Search number that is less than or equal to the number entered
>	Search number that is greater than the number

	entered
>=	Search number that is greater than or equal to the number entered
Between	Search value that is between to values
in	Search a value that is in another set of values

1.6.1. Advanced Search

The Advanced Search view allows you search based on several search values simultaneously to narrow your results.

Search Criteria	Definition
Set ID	Set ID defaults to SFCMP . This is the ID for San Francisco State University.
Department	Here you will type the four digit department code where you will search for the vacant position. Once you find and select the link for your department a new page will appear.
Description	You may search by the description of the position
Company	SF for San Francisco State University.
Location SetID	SFCMP for San Francisco State University campus.
Location Code	Criteria for Location are ORSP , Off Campus and On Campus .

Vacant Positions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: = SFCMP

Department: begins with

Description: begins with

Company: begins with

Location SetID: begins with

Location Code: begins with

Case Sensitive

Search
Clear
Basic Search
📄
Save Search Criteria

Figure 1-3 Vacant Positions advanced search function

1.6.2. Basic Search

The basic search allows you to search by choosing only one value and one search criterion.

Set ID	This will always default to SFCMP
Department	Here you will type the four digit department code where you will search for the vacant position. Once you find and select the link for your department a new page will appear.
Description	A description is the name that you would use to override the Title if needed.
Company	SF for San Francisco State University.
Location SetID	SFCMP for San Francisco State University campus.
Location Code	Criteria for Location are ORSP , Off Campus and On Campus .

Vacant Positions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: =

[Advanced Search](#)

Figure 1-4 Vacant Positions basic search function

1.7. Position History Inquiry

The **Position History** inquiry is used either to view individual positions or to view the entire list of positions for a particular department and their incumbents regardless of whether the positions are vacant or occupied. This online report is important to check if you do not locate the position you are seeking in the vacant position inquiry. This view will allow you to see if the position that you are searching for is currently occupied.

A Position Search shows:

- Whether a vacant position exists in your department
- Whether the position exists, and is currently occupied
- If you should proceed with requesting a new position
- If a vacant position exists prior to initiating an **Employee Hire** or an **Employee Change** transaction.

1.7.1. Advanced Search

The Advanced Search view allows you to run a report based on several search values simultaneously.

Values	Search Criteria
Position Number	You may search by position number. The position number is a unique number that is assigned to individual employees.
Description	Description is a title that is given to a position based on the CSU Salary Job schedule.
Position Status	You may search by position status given these criteria: Approved, Frozen, Proposed.

Business Unit	Business Unit will always be SFCMP.
Department	You may search based on Department ID.
Job Code	The Job Code is the four digit number that corresponds to a specific position.
Reports To Position Number	You may search for position that report to a specific position.

Position History


Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value


Position Number: begins with

Description: begins with

Position Status: =

Business Unit: begins with 

Department: begins with 

Job Code: begins with 

Reports To Position Number: begins with

Case Sensitive


[Basic Search](#)  [Save Search Criteria](#)

Figure 1-5 Positions History advanced search function

1.7.2. Basic Search

The basic search allows you to search by choosing only one value and one search criterion.

Values	Search Criteria
Position Number	You may search by position number. The position number is a unique number that is assigned to individual employees.
Description	Description is a title that is given to a position based on the CSU Salary Job schedule.

Position Status	You may search by position status given these criteria: Approved, Frozen, Proposed.
Business Unit	Business Unit will always be SFCMP.
Department	You may search based on Department ID.
Job Code	The Job Code is the four digit number that corresponds to a specific position.
Reports To Position Number	You may search for position that report to a specific position.

Position History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: begins with

[Advanced Search](#)

Figure 1-6 Positions History basic search function

1.8. Employee Search Inquiry

This is used to determine if the individual that you are hiring is already in the E-TRAC system. Although E-TRAC does some checking on the SSN and name of the employee, it is very important to determine if the individual already has a record in the system prior to requesting a new hire.

1.8.1. Advanced Search View

The Advanced Search view allows you to run a report based on several search values simultaneously.

Search Criteria	Definition
Name	Can search by any name that appears in the system
National ID	National ID is the social security number associated with the employee.

Employee ID	You may search by the Employee ID which is the same as SFSU ID number.
Last Name	You may search by the employee's last name.
First Name	You may search by the employee's first name.

Employee Search

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Name: begins with

National ID: begins with

EmpID: begins with

Last Name: begins with

First Name: begins with

Case Sensitive

[Basic Search](#)

Figure 1-7 Employee advanced search function

1.8.2. Basic Search View

The basic search allows you to search by only one search criterion and the condition of "begins with."

Search Criteria	Definition
Name	Can search by any name that appears in the system.
National ID	National ID is the social security number associated with the employee.
Employee ID	You may search by the Employee ID which is the same as SFSU ID number.
Last Name	You may search by the employee's last name.

First Name	You may search by the employee's first name.
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Figure 1-8 Employee basic search function

1.9. Password Guidelines

Security is a number one priority for the E-TRAC team. Shortly after attending training you will receive your user ID and password.

PeopleSoft allows you to maintain your own password and request a new password if you forget or lose the original. E-TRAC will prompt you every 90 days to change your password. Make a mental note of your password after you change it. Passwords give you access to sensitive information and are not to be shared under any circumstances.

1.9.1. Guidelines and Requirements for Secure Passwords

Upon receiving your temporary password, take time to determine a new, secure, well encrypted password by following the guideline below.

1.9.1.1. Password requirements

- Minimum length is 8 characters.
- Must contain at least one uppercase alpha character (A-Z).
- Must contain at least one lowercase alpha character (a-z).
- Two of the characters should be special characters, but cannot contain the following: #, @, or a space.
- Must contain at least one number (0-9).
- Cannot contain any of your first, middle, or last names.
- Cannot contain any current user ID.

- Cannot contain your previously used password (the system stores your last password).
- Since accounts are locked after five failed sign-in attempts, the following suggestions are optional. We recommend that your password.
- Does not contain repetitive characters (sequences).
- Does not contain any names, person, places, or things found in a common dictionary.
- An example of a good or more secure password: TGBdd65*. An example of a poor or less secure password: HOLLOWAY.

1.9.2. How to Change your password

- 1 Log in to PeopleSoft and click the **Change My Password** link in the Menu panel.

The screenshot shows the 'Change Password' interface in PeopleSoft. On the left is a 'Menu' panel with a search box and a list of navigation options. The 'Change My Password' option is highlighted. The main content area is titled 'Change Password' and displays the user's information: 'User ID: AVPPR35' and 'Description: Gomez,Xavier'. Below this are three input fields labeled '*Current Password:', '*New Password:', and '*Confirm Password:'. At the bottom of the form is a yellow 'Change Password' button.

Figure 1-9 Change Password view

- 2 Type your current password in the Current Password box.
- 3 Then type your new password in the New Password box. Re-type your new password to confirm it.
- 4 Click **Change Password**. When you click this button, you will notice the word **Saving** flashing in the right hand corner. When this is done the General Profile Information will reappear. At this point you will know that your new password has been saved.

1.10. User Support

For more information you may visit the HRMS website at <http://sfsu.edu/~cms>. If you have trouble conducting a transaction in E-TRAC you may also call 5-Help at 5-HELP (5-4357) or e-mail us at fivehelp@sfsu.edu.