

# Appendixes

## Appendix A Reference Materials and User Support

Once the E-TRAC website is implemented all of the following reference materials will be available for download. Since these documents will be updated periodically, the versions on the website will be the most current.

### **E-TRAC Terms Glossary**

A reference guide of E-TRAC terms.

### **E-TRAC Action-Reason Reference Guide**

A list of the E-TRAC action-reason combinations cross referenced with the previous terminology of the 107 form.

### **FAQs**

Frequently asked questions are also included for your reference and will be continually posted to the E-TRAC website.

### **Field Definitions**

The SFSU recommended use for each E-TRAC field is listed in the attached section.

### **Open Lab Sessions**

Furthermore, the E-TRAC training team will be holding periodic open lab sessions. These sessions can be arranged by e-mailing [hmac@sfsu.edu](mailto:hmac@sfsu.edu) any time after you have attended training.

### **User Support**

User support is also available if you should have any issues or questions. The user support desk can be reached by an on-campus phone at **5.HELP** or by e-mail at [etrachlp@sfsu.edu](mailto:etrachlp@sfsu.edu).

Contact the support desk in relation to:

- User IDs and Passwords
- Data Issues: Data discrepancies, Missing data, etc.
- System Issues: Connectivity, Performance, Page problems, etc.
- General Use: "How do I..."

## Appendix B FAQs

### 1 How do I know if my password is accepted?

Once you change your password, the word **Saved** will appear in the upper right hand corner of the screen. You can also test your new password by signing out and logging in again with your new password.

### 2 Are user ID and password case sensitive?

Yes. If you are experiencing problems logging into the system, ensure that your **Caps Lock** button is not on.

### 3 How long is the password valid?

Your E-TRAC password is valid for thirty (30) days. If you don't change the password within thirty days, you will be prompted to change your password the next time you log in.

### 4 What is the New Window link and what does it do?

The New Window link opens a new PeopleSoft window in your browser. This can be especially helpful when processing transactions that require you to refer to several different pages within PeopleSoft.

### 5 What are the steps outside of E-TRAC for a given process?

The E-TRAC *Action-Reason/107 Reference Guide* included in this training manual, and soon to be available online, was designed to answer these questions. Please refer to this document when preparing any E-TRAC document to ensure that you have completed the proper steps outside of the system. Although E-TRAC replaces the 107, there are several other steps depending on the scenario that will need to be completed.

### 6 What is the standard format for entering personal data information?

In the **Employee Hire Request** module, it is extremely important to make sure that you properly complete the personal data section. This means spelling out the city (**San Francisco** rather than **SF**), using **apt** or **#** to indicate apartment number, spelling out **suite**, using abbreviations such as **St**, not using commas or periods, and for number streets using the **st**, **nd**, **rd** extensions e.g. **3rd Avenue**.

### 7 What is the Save for Later button and what is it used for?

The **Save for Later** button allows you to save your E-TRAC and come back to it at a later date without forwarding it to the approvers on your list. Please note that all required E-TRAC fields **MUST** be filled out in order to use the **Save for Later** feature.

### 8 Once you save an item for later it will remain in the system indefinitely.

Yes.

### 9 What if I want to make changes to the E-TRAC that I've already submitted?

If your E-TRAC transaction has already been submitted for approval, it is recommended that you, the E-TRAC requester, should first check to see where your E-TRAC transaction is in the approval process. If it has not yet been approved by the first level approver, it is recommended that you

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communicate the changes to the first level approver in the E-TRAC approval process so that the changes can be made before the transaction is forwarded to the second level approver.

#### **10 Who gets an e-mail after I complete an E-TRAC?**

After an E-TRAC is submitted, the first level department approvers receive an e-mail and a **worklist** entry. Once they approve the transaction, the next level approvers receive e-mails and **worklist** entries until the transaction is loaded into the HR system.

#### **11 Once a position is approved, what happens to it if it remains unfilled?**

Nothing happens to the position if it is loaded and remains vacant.

#### **12 How quickly can E-TRAC transactions move through the approval process, from creator to second level approver?**

With e-mail and **Worklist** notifications, each approver in the approval process will be alerted of transactions awaiting their approval. Provided that all key players in the approval process are present and logged on to their e-mail program as well as to PeopleSoft, turn around time can be very quick. In the best case scenario, it can take as little as one day for an E-TRAC transaction to move from creator to second level approver.

#### **13 What does it mean if the field has an asterisk next to it?**

A field with an asterisk in E-TRAC indicates that the field is required in order to complete your E-TRAC transaction. If required fields are left blank, the E-TRAC transaction is considered incomplete, and cannot be saved for later nor submitted for approval.

#### **14 In addition to the Job Code, do we need to enter the salary?**

In the **Employee Hire Request** module, the Comp Rate is required. On the **Employee Change Request** module, this depends on the type of action-reason combination selected. If the field is visible, changing the Comp Rate is optional, and if there's an asterisk (\*) next to the field, it's required.

#### **15 What happens when an employee is in a position that changes?**

Position Change requests through E-TRAC are only available for positions with no incumbents. The system will prevent changes to positions when someone is in the position. If a change to a position is required when the position is filled with an active employee, you must contact the HR department.

#### **16 Is there a list of E-TRACS that I've created?**

**My E-TRACS** at the bottom of the E-TRAC Home page is a list of E-TRACS that you've created. Additionally, you can use the **Find an Existing E-TRAC** function found on E-TRAC Home by clicking on the magnifying glass.

#### **17 What is a National ID?**

In E-TRAC, the National ID is the equivalent to an employee's social security number.

#### **18 Why would I want to search by National ID?**

Particularly in the case of new hires, searching by National ID aids in identifying employees who already exist within PeopleSoft. Additionally, searching by National ID can confirm that the

person for whom you are processing the transaction is the same person whose record appears in PeopleSoft.

### **19 What is an Empl ID?**

An EmplID (employee identification number) is the unique identifying number assigned to SFSU employees for tracking purposes in PeopleSoft.

### **20 When I entered the National ID (social security number) for a new hire, personal data was already populated. What does that mean?**

If the personal data is grayed out, it means the individual is currently employed at SFSU, and the information added will be treated as a concurrent job. If the personal data is pre-populated but editable (not grayed out), it means that the employee was previously employed at SFSU, and the transaction will be treated as a rehire.

### **21 What is the appropriate format for entering information on the personal data page?**

When entering information on the personal data page, it is recommended that you use mixed case for name, address and city fields (ex: Jane Doe not JANE DOE), spell out cities and street names (San Francisco not SF; South Mayfair not So. Mayfr), and use standard abbreviations for states and street types e.g. CA not Calif.; Holloway Ave. not Holloway Av.

### **22 How far back does position history go?**

Position history is stored indefinitely in PeopleSoft.

### **23 What is Empl Class?**

The Empl Class (Employee Class) indicates the status of a position, such as Regular, Temporary or Emergency Hire.

### **24 What is the Rate Code?**

The rate code indicates how an employee is paid. In the CSU, there are two types of rate codes used: **CSU Monthly** and **CSU Hourly**. **CSU Monthly** indicates that the employee is in a salaried position, while **CSU Hourly** indicates that the employee is paid on an hourly basis.

### **25 In what instances will the rate code change?**

The only time the rate code can change is if the department decides to change the way an employee is paid. For example, some temporary hires are paid on an hourly basis. If the employee's appointment is extended to reflect a temporary appointment, the department may decide to change their rate code from **CSU Hourly** to **CSU Monthly**.

### **26 Which rate codes are most commonly used in the CSU?**

CSU Monthly and CSU Hourly.

### **27 Can we enter hyphenated names? Names with apostrophes? Accents?**

You cannot enter names with accents; however, you can enter hyphenated names as well as names with apostrophes.

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**28 What does it mean when an employee has concurrent jobs?**

Concurrent job refers to when an employee has more than one position on campus or with another state agency.

**29 How do you identify employees with multiple jobs?**

You can get a view of all of the employee's active job records by clicking the **Employee Search** link from the **E-TRAC Home** page.

**30 Are there a maximum number of characters for the password?**

32 characters maximum.

**31 What if I save an E-TRAC for later, can another user log in and submit it for me if I am somehow prevented from logging in and submitting it, for example if I am trapped under a boulder, lost at sea, extremely tired, etc?**

If a user creates an E-TRAC and saves it without submitting it for approval, only that user can go back in and submit the transaction for approval. We will look into adding a feature that gives another creator or approver in that department access to submit the transaction for you. Until we add that feature, any creator or approver in that department may view the transaction, and then create/submit a separate E-TRAC in lieu of the "abandoned" E-TRAC. ;-) I've added this issue to our enhancement request list.

**32 Will the system warn me if I am trying to appoint someone to an additional appointment that will put my total timebase over 1.0?**

The system will warn the person approving the E-TRAC in the HR department if the employee's time base is over **1.00** so they can make appropriate corrections. This is not a hard error, just a warning.

**33 Since the termination effective date is the day after the last day worked, is it acceptable to put a Saturday as the effective date, or is it the first business day?**

It's okay to put Saturday as the effective date.

**34 Can I submit transactions for other departments? Do I have to be set up as an alternate creator for those departments?**

An E-TRAC creator may submit a transaction for any department they like. Once submitted, that transaction will be routed to the approvers defined for the selected department. The creator should have that department defined in their row level security setup; otherwise they will not be able to view the E-TRAC after it has been submitted.

**35 In E-TRAC it is not easy to go back to the home page, is there any way to make it easier to locate?**

A hyperlink is included at the bottom of every E-TRAC page to take you back to the E-TRAC Home page.

## Appendix C E-TRAC Terms

Terms	Definition
Action	An action classifies a type of employee change. Using the correct action helps the system determine which fields are necessary to display based on the type of transaction.
Breadcrumbs	Breadcrumbs are the trail of links, located on the upper left hand side of your E-TRAC screen that displays the navigation path.
Business Process Guide	A business process guide is a document outlining how to complete a transaction.
Department	The Department ID is the basic component of the organization structure and security hierarchy.
Effective Date	The effective date reflects the date upon which a transaction becomes effective. For example, a new position can be effective on January 1st, 2004, however, this position will not show in a list of available positions until that date.
Employee ID (Empl ID)	This is the unique identifier in E-TRAC for each employee. This number is system generated, and is not related to an employee's Social Security Number.
Error	Error messages notify the user that there is a definite problem with the transaction that they are attempting to submit in E-TRAC. Often the problem field will be highlighted in red. This provides the user an opportunity to fix the problem and attempt to submit the E-TRAC once again. An error message will not allow the user to proceed and submit the transaction.
E-TRAC Position Number	A system generated number identifying the position. Unlike the current SCO position number from which certain data elements can be derived, the E-TRAC position number does not have any intrinsic meaning.
Field	A field is one data element on the E-TRAC form.
Form 107	The form which was previously used for submitting staff employee appointments and job changes to the Human Resources Department.
Grade	The grade is what was previously known as the salary range.
Hire	The E-TRAC term for an appointment. The <b>Employee Hire</b> module is used to hire someone who is either new to the university or is being rehired. The <b>Employee Change</b> module is used to hire someone into a new temporary appointment.
Hyperlink	A hyperlink is a colored link, that when clicked will take the user to an internet page.
Immediate Pay	Immediate Pay is the term in E-TRAC for employees that are paid at a certain rate for a combination of days or units as with Special Consultants or units based on enrollment as with CEL Faculty.
Job Code	This field identifies the job classification of the employee per the CSU salary schedule.
Labor Cost	In the second phase of our implementation SFSU will incorporate LCD (Labor Cost Distribution), which breaks down employee labor costs from the Human

Distribution (LCD)	Resources system and distributes them to the appropriate funding sources in the financial system.
Module	One functional area of E-TRAC. E-TRAC is divided into 4 modules; New Position, Position Change, Employee Hire, Employee Change.
Multiple Jobs/Concurrent Jobs	In E-TRAC a concurrent job situation is where an employee has more than one part-time appointment at SFSU. This is often called 'multiple jobs' and both terms are used interchangeably. These appointments may be in the same department or in multiple departments. Each concurrent appointment should add up to a total time base of less than or equal to one FTE or Full-Time Equivalent.
PIMS	PIMS is the State Controller's Office system which is used for processing payroll.
Pooled Position	A pooled position has multiple headcount such as a special consultant. Pooled positions are maintained by the budget office. In many cases these positions will already be established, however for the cases where they are not, the user will have to initiate a new position request.
Reason	A reason provides more detail about the Action. Reasons also serve to help the system determine which fields are necessary for a given transaction.
Regular	A position designated as regular denotes permanent funding.
Temporary (Temp)	A temporary appointment or emergency hire denotes that the funding for the position is temporary.
Vacant Position	A position without an incumbent is considered vacant. These positions are viewable by department online through the Vacant Positions Inquiry.
Workflow	Technology that allows for the automation of processes. Workflow involves routing approval items to users in a process chain and notifying users automatically by e-mail.
Worklist	The area of the system that maintains a list of transactions that have been generated and require the user to approve or reject the transactions.