3. Requesting New Positions

This chapter describes the procedures for requesting a new position in E-TRAC.

This chapter contains the following sections:

3.1. What is a Position in E-TRAC?

The E-TRAC New Position Request is used to request that a newly approved position is added to the system. This involves cases where the President, Cabinet Officer, or Dean has approved the creation of a position that is new to the university. A new position is considered vacant with no employee associated with it.

When the new position request is fully approved and loaded into the Human Resources Management System (HRMS) a new position will exist within the system. New positions are added to the system after the President, Cabinet Officer, or Dean has approved the creation of a position that is new to the university.

This new position will be tracked by a unique position number. In PeopleSoft, this position number is a system-generated number used to identify the position record in the system. The data elements that were previously associated with the position such as department ID, agency, unit, and classification are now a part of a position record that is easily searchable.

Positions are characterized by their department, job code (classification) and their funding. Therefore a new position is required for each of these unique combinations.

There are two position related searches available to the E-TRAC user, one to view a position's history, another to view vacant positions by department. E-TRAC provides a unique opportunity to view your department's positions and maintain them. Working in E-TRAC will allow you to become more familiar with the position data for your department. Also, working in E-TRAC will help ensure that updates, changes and requests are made on a timely basis.

3.2. New Position Request Overview

New Positions are first requested by Department E-TRAC creators who are authorized by their departments to request the creation of a position. Position requesters should consult with their departments to ensure that they are following departmental procedures and have completed the necessary steps outside of the E-TRAC process.

This overview briefly describes the process of requesting and approving a new position.

1. The President, Cabinet Officer, or Dean's signature may be required in memo form for new positions only. This memo states the reason for the new position, identifies elements from the position number (agency, funding unit, job code, and serial number), how the position will be funded, and the projected monthly salary and benefits for the position, for both the current fiscal year and the following fiscal year.

2. A signed approval copy of the memo is submitted to Faculty Affairs prior to any work in E-TRAC.

3. Faculty Affairs issues a Vacant Search Number for posting.

4. A Vacant Positions search and a Position History search (discussed in the section Viewing Position Data for Your Department) are performed in order to determine if the position is already in the system.

5. If there is a need for a new position, the request is completed and submitted for approval.

6. Department approvers review and approve the new position request.

7. Budget approvers approve and add to the request.

8. HR Services reviews, approves and loads the request to the HRMS, creating a new position number.

9. The requester receives an e-mail notification that includes the new position number.

3.3. Position Changes and Job Changes

Changes to existing positions, such as reclassifications or funding source changes will happen either through the Vacant Position Change module or the Employee Change module of E-TRAC based on the following conditions:

- If a position is vacant and changes need to be made you will use the Vacant Position Change Module.

- If a position is occupied by an employee then the Employee Change module will be used to change the FTE (funding source) or job code on the employee level, and any updates to the position will be handled in the Budget Office.

These cases will not be handled through the New Position Request module.

3.4. Exploring the Position Request Page

Before requesting the creation of a new position it is important to know what information you will need in terms of the information you will enter in the fields of the New Position Request page in E-TRAC. Please note that these refer only to the fields necessary for creating a new position. All required fields are marked with an asterisk(*).

Field Title	Purpose for New Position Request
Effective Date	The Effective Date is the first business day that the new position will be effective. This date can be before, after, or equal to the current date. You may type the six digit date (MMDDYY without separators, the eight digit date with separators (MMDDYYYY), or simply click the calendar icon and select the date. You may also click the calendar icon which displays a dialog box wherein you select the date. After selecting the day in the dialog box, the date appears in the effective date field box. After entering the effective date, TAB to the next field.
Depart-ment ID	The value in the **Department ID** field will default from the department of the E-TRAC user. This department can be changed in the event that you are a user who requests positions for multiple departments.
Location	Criteria for **Location** are **ORSP**, **Off Campus** and **On Campus**.
Job Code	The **Job Code** is the same as the **CSU Classification Code** that corresponds to classifications in the CSU Salary Schedule. If you know this classification code you can simply type it in the **Job Code** field, and the value will be validated by the system. However, if you do not know the job code, click the search icon and search by **Description**.
Union Code	Union code will appear based on Job Code selected. It will be read only.
Grade	The Grade defaults based on the Job Code entered.
FLSA Status	FLSA Status should be grayed out for new position requesters and department level approvers. FLSA Status will depend on Job Code and Grade combination.
Regular/ Temporary	This field identifies the position as Regular or Temporary. The default of this field is Regular; override if necessary. Positions are defined as permanently or temporarily funded, not whether the employee assigned to the position is regular or temporary.
Full/Part Time	This field identifies Fulltime (1.0 time base) or Parttime (less than 1.0 time base) such as hourly positions.

Reports To	The Reports To field is used to indicate the position number that the new position will report to, which is used in organization reporting. This selection should contain the appropriate administrator supervising this position.
Funding Source	The Funding Source code is required to advise the Budget Office how the position will be funded. Your options for funding source codes are: **NG001, NR001, DH201, TL006, TL008, TL016, TL017, TL033, TP201, TP202,** and **TD001**. These funding sources will not require a project ID. If the funding source is tied to a Project ID, the Project ID will be required.
Project ID	Project ID will be required for funding sources not listed above. Project IDs will be comprised of 8 numbers.
Title	The title will default from the job code. This should be changed for MPP positions only and when necessary.
Notes	The Notes field is available in the case that you want to include a relevant message to the next level approver. All notes will be identified with your user ID and will be viewable to subsequent users of the system.

3.5. Requesting a New Position

Before requesting a new position for your department you need to make sure that position doesn't already exist for your department. You can do this by running a Vacant Positions Inquiry report. When you've verified that there isn't an existing position similar to what you would like to create, you may request the E-TRAC transaction.

1 From the **Home** page select **SFO Self Service** > **E-TRAC** > **E-TRAC Home > E-TRAC Home.**

2 When the **E-TRAC Home** page appears, select the **New Position** radio button under **Create a New E-TRAC**, and click the **Add** button.

The **New Position Request** page is comprised of two sections: **Required Fields** and **Notes**. It is mandatory that you complete the **Required Fields** section and optional that you complete the **Notes** section.

3 Choose an effective date in the **Effective Date** field.

4 Leave the default value in the **Department ID** field. This department can be changed in the event that you are a user who requests positions for multiple departments.

5 From the **Location** drop down menu, select **ORSP**, **Off Campus** or **On Campus**.

6 In the **Job Code** field, you may type the **CSU Classification Code** that corresponds to classifications in the CSU Salary Schedule. However, if you do not know the job code, click the search icon (magnifying glass) and search by **Description**.

Notice that only the first 300 results can be displayed. If at this point if you have not found the **Job Code**, change the criteria in the **Search by** field from **Job Code** to **Description**. You may conduct a search by typing in a description if you choose. Once you find the **Job Code**, click the **Job Code** link, the job code will appear in the box, and use the **TAB** key to move to the next field to allow the system to validate your entry.

7 Select the Grade if applicable. The grade changes based on job code. For example, there may be **Specialist I** and **II** for a specific job code, and then **Foundation**, **Career**, and **Expert**, in another job code.

8 From the **FLSA Status** box, select either **Exempt**, **Nonexempt**, or **Other**.

9 Select **Regular** or **Temporary** from the **Regular/Temporary** drop down menu, and **TAB** to the next field.

10 Type the FTE. The FTE can be 1.0 (full-time)

11 Select **Full-Time** or **Part-Time** from the **Full-Time/Part-Time** drop down menu, and **TAB** to the next field.

12 Type the appropriate funding source code. Your options are **NG001, NR001, DH201, TL006, TL008, TL016, TL017, TL033, TP201, TP202, TD001**. Each funding source has a corresponding Project ID that will appear. For inquiries of funding source code, contact your Budget Specialist.

13 In the **Reports To** field, you must select the position number of the person that the new position will report to. Click the search icon (magnifying glass) to see the default list of MPPs or Department Chairs that this position may report to. Enter the **Dept ID** to search the list of system identified MPP level employees for your department. If you cannot locate the dean or manager in this list, change the search criteria to **Name**, and search based on the supervisor name.

14 The **Title** will default from the job code selected. This should be changed for MPPs only.

15 In the **Notes** section (optional), enter any notes that relate to the position request. To enter additional notes, click **Insert**.

16 Click **Save Work**. Your transaction is not complete until you click **Submit** at this point.

Note: If the Submit button is not pressed after the Save Work button is pressed, the transaction will be saved without going to the approver and will appear in the “My E-

TRAC Transactions" listing with a status of "New E-TRAC" available for editing or submitting at a later time. This is a helpful if you are uncertain about any piece of data in your request. However, you must complete all of the required fields in the request prior to clicking Save Work. You must enter something in the required fields as the system will not allow you to save an E-TRAC record unless it is complete.

17 A **Save Confirmation** screen appears. Your transaction is not submitted until you have received this confirmation screen.

18 Click **OK**. After pressing the **OK** button, the **Submit** button will appear for submitting the E-TRAC transaction for approval.

19 If you are ready to submit the transaction, click **Submit**.

An E-TRAC transaction page appears. The fields are grayed and are for viewing only. This page allows you to review the information that you have submitted and shows the status of your transaction.

3.5.1. The E-TRAC ID Number

Near the top of the E-TRAC page, the system has generated a unique E-TRAC ID for the transaction. You may want to note this number in order to easily locate your request once it is submitted.

From this point, your request goes to the first level approver designated for your department.

Notice that in the Approval History section, under the Approval Status column the text reads, **Submitted by Creator**. This section also indicates where this transaction will go next. In the event that one of your transaction approvers makes any changes to your request, you will receive an e-mail notification.

3.6. After the E-TRAC is Submitted

After your E-TRAC request is submitted it is no longer available for you to update. You will receive an e-mail notification that your E-TRAC was successfully submitted. The E-TRAC request will be routed automatically to the first department approver for your area. They will also receive an e-mail notification, which will let them know that a transaction is waiting in their worklist for approval.

Each approver will have the ability to review and make changes to the E-TRAC request. Therefore, if you determine after you submitted the E-TRAC that you made a mistake, you can always ask one of your approvers to make the necessary change. You will receive an e-mail in the event that any changes were made to your E-TRAC request.

3.7. New Position Field Definitions

The following field definitions are provided for your reference. These are field definitions for the New Position Request page only, and do not apply to search functions such as the Vacant Positions search page.

E-TRAC ID

Display Only	Yes
Required	Yes
Default	The value will default to New until the transaction is saved and a number is generated by the system.
SFSU Use	The E-TRAC ID is used to track E-TRAC transactions. This number is generated by the system in a sequential order once a transaction is saved. Make note of this number in order to easily retrieve prior transactions.
Values	Reference table for values.

Effective Date

Display Only	No
Required	Yes
Default	The field will be blank until you type a value or select a value from the calendar icon. The calendar box will default with the current date highlighted.
SFSU Use	This field contains the date when the first row of position information and the position details becomes or became effective. This can be a past, current or future date. **Note:** When hiring someone into this position the dates must coordinate. The position will not be available or 'effective' to hire someone into until this date is entered.
Values	Reference table for values.

Department

Display Only	No
Required	Yes
Default	The Department ID will default to the department of the E-TRAC user.
SFSU Use	The Department ID is a PeopleSoft value used to track the SFSU organization structure and security hierarchy. Users will only be able to create E-TRAC transactions for their own departments and the departments which report to them.
Values	

Location

Display Only	No
Required	Yes
Default	The Location Code defaults to **On Campus**.
SFSU Use	This field displays the job location for the position being created. The default for this field is **On Campus** which can be overwritten if necessary.
Values	There are three values to select from: **ORSP:** for ORSP employees only **Off Campus:** for employees who work off campus **On Campus:** for employees that work at the main campus

Job Code

Display Only	No
Required	Yes
Default	None
SFSU Use	This field identifies the job classification of the employee per the CSU salary schedule.
Values	Reference table for values.

Regular / Temporary

Display Only	No
Required	Yes
Default	Defaults to Regular
SFSU Use	This field identifies the position as Regular or Temporary. The default of this field is **Regular**; override if necessary. Positions are defined as permanently or temporarily funded, not whether the employee assigned to the position is regular or temporary.
Values	There are two values for this field: **Regular** or **Temporary**.

Union Code

Display Only	Yes
Required	Yes
Default	Defaults once the Job Code is selected.
SFSU Use	The Union Code is known to SFSU as Bargaining Unit. The Union Code is determined by Job Code which defaults from the CSU salary schedule.
Values	Reference table for values.

Grade

Display Only	No
Required	Yes
Default	Defaults to the lowest grade for the Job Code selected.
SFSU Use	The Salary Grade is known to SFSU as the range for the classification code. This value will default to the lowest range for the job code selected.
Values	The values in this field are determined by the Job Code (classification) selected.

Step

Display Only	No
Required	Yes
Default	None
SFSU Use	This field is used to indicate the salary step for some classifications within unit R08 only.
Values	Reference table for values.

FTE

Display Only	No
Required	Yes
Default	Defaults to **1.00**
SFSU Use	This value is currently known to San Francisco State as Time Base. This field contains the calculated percentage of standard hours for the position and the standard work period. A position with an FTE of 1.00 (100% of the full-time equivalency) equals a full-time time base. FTE on the Employee Hire request does relate to an employee holding the position.
Values	Reference table for values.

Min/ Month

Display Only	Yes
Required	Yes
Default	Defaults to the minimum salary amount for the Job Code/Range selected.
SFSU Use	This field contains the minimum salary amount allowed for the position based on a combination of the Job Code/Range. If a new range is selected the screen will update with a new minimum value. This data displays in order to provide the user with the information necessary to determine the correct salary amount for this position.
Values	Reference table for values.

Max/ Month

Display Only	Yes
Required	Yes
Default	Defaults to the maximum salary amount for the Job Code/Range selected.
SFSU Use	This field contains the maximum salary amount allowed for the position based on a combination of the Job Code/Range. If a new range is selected the screen will update with a new maximum value. This data displays in order to provide the user with the information necessary to determine the correct salary amount for this position.
Values	Reference table for values.

Full/ Part Time

Display Only	No
Required	Yes
Default	Defaults to **Full-Time**.
SFSU Use	This field indicates whether the position is full-time or part-time based on a standard 40 hour work week. The default is **Full-Time**; override if necessary. Therefore, if the position is less than 40 hours a week select the **Part-Time value**.
Values	None

Funding Source

Display Only	No
Required	Yes
Default	None
SFSU Use	This field is used by the department to indicate the funding source for the position. This is a free form field, which serves as a link back to the current accounting system.
Values	Reference table for values.

Reports To

Display Only	No
Required	Yes
Default	None
SFSU Use	The Reports To field is used to indicate the position number that the new position will report to, which is used in organization reporting. This selection should contain the appropriate administrator supervising this position.
Values	The valid values for this field will be M80s (MPP) and Department Chairs. The user may have to search by incumbent name to locate the reports to position number.

Title

Display Only	Yes

Required	Yes
Default	Defaults from Job Code
SFSU Use	The standard title for the job classification which can be changed if necessary as in the case with MPP positions
Values	Reference table for values.

User ID

Display Only	Yes
Required	Yes
Default	Defaults to the current user.
SFSU Use	This value indicates the ID of the current E-TRAC user, which will be used to identify any notes that they create.
Values	Reference table for values.

Date/ Time

Display Only	Yes
Required	Yes
Default	Defaults to the current date/time.
SFSU Use	These fields are used to time stamp any notes entered by the user.
Values	Reference table for values.

Notes

Display Only	No
Required	Optional
Default	None
SFSU Use	A virtual post-it note. To be used in cases where the E-TRAC user needs to add supplementary information, or pose a question or comment to the subsequent users. The training will identify certain processes or business conditions that require the use of notes.
Values	Reference table for values.