1. **Using E-TRAC**

1.1. **Pre-requisites**
Before 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**

![Navigational links](image1)

Figure 1-1 Navigational links

![Navigation to E-TRAC Home Page](image2)

Figure 1-2 Navigation to E-TRAC Home Page

![E-TRAC homepage](image3)

Figure 1-3 E-TRAC homepage
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 E-TRAC Types to narrow the transaction list to staff, faculty or student E-TRAC transactions only or any combination.

- **Filter My E-TRAC Transactions**
  Use this section to customize your list of E-TRAC transactions or to quickly locate an E-TRAC transaction. The following search options are available: Depart ID, E-TRAC ID, and, Find, (any text/numbers). You may also customize this page by clicking the check box (es) to: Only show My E-TRACs, Include Completed, Open E-TRACs in new window, and indicate the number of Rows per page you wish to display.

1.3.1. **Filter My E-TRAC Transactions**

You can review your transactions in the My E-TRAC Transactions section. This list allows you to quickly view the current status of transactions that you have recently submitted, approved, or rejected.

Below is an example of the Filter My E-TRAC Transactions section:

![Filter My E-TRAC Transactions](image)

- **Dept ID search field**
  Based on your specific department security, you may view E-TRAC transactions based on department number only, type in the 4 digit Dept ID and click the Refresh button (Refresh).

- **E-TRAC ID search field**
  To locate the transaction by E-TRAC ID, you can type the 8 digit E-TRAC ID in this field and click the Refresh button (Refresh).
• **Find search field**
  You may enter any numbers or letters to locate text or numbers associated with corresponding E-TRAC transactions. For example, if you type in **Change** in this field and click the binocular icon (🔍), all Employee Change E-TRAC transactions will appear.

• **Only show my E-TRACs**
  Selecting this option will allow you to view only the E-TRACs that you have saved, submitted, approved or that are awaiting your approval.

• **Include Completed**
  Selecting this option will allow you to view all E-TRACs for your department, including those that have been fully approved by Human Resources, or rejected at any level.

• **Open E-TRACs in new window**
  Selecting **Open E-TRACs in new window** (recommended) allows you to view and process an E-TRAC in a separate window from the E-TRAC home page. You will notice that the transaction is still viewable in the list under My E-TRAC Transactions section. To remove or update the transaction you had just submitted from the list, click the Refresh button ( actualizar ) and the transaction status will be updated in your E-TRAC Homepage.

  **NOTE:** Once you are finished with an E-TRAC Transaction opened in a new window, close the window by clicking the X button at the top of your window. **DO NOT** click the **Go Back To E-TRAC Home Page** link.

• **Rows per page search field**
  **Rows per page** allows you to view your transactions by a limited number per page. If you had 200 transactions you can type 50 in the **Rows per page** box in order to view 50 transactions at a time which will give you 4 pages to view. Note: the more transactions you have set to appear on a page, it may take longer for the page to display.

• **Save**
  This function allows you to save your settings. When you log out or open a different screen, you can return to this page and your settings will remain the same.

• **Clear**
  This link allows you to clear the fields and settings you had specified.
1.3.2. **My E-TRAC Transactions**

My E-TRAC Transactions section displays E-TRAC transactions. The transactions list default setting is shown below in Figure 1-5 below.

![Figure 1-5 My E-TRAC Transactions with pending transactions.](image)

- To view additional transaction information, click on Job Info Tab to view the additional columns.
- To expand and display all columns on My E-TRAC Transactions, click on the show all column icon ( ). To collapse the information back to default view you can click on the icon again. See Figure 1-6 below.

![Figure 1-6 My E-TRAC Transaction to expanded to show all columns](image)

- **Transaction Order**
  Place and hold the cursor over the column heading for each column of transaction data and click to sort your transaction list by that column heading. To toggle from ascending to descending order, click the column heading again. Note: any sorting order you execute here applies only to the current page.

- **Customize**
  This link allows users to personalize column display within My E-TRAC transactions list. Columns may be suppressed (hidden) or displayed in an order according to the users’ preference. See Figure 1-7
Chapter 1

Figure 1-7 Personalize Column and Sort Order for My E-TRAC Transactions

IMPORTANT NOTE:
The preferred and time-efficient personalization method suggested is use of **Column Order** rather than the **Sort Order**.

- **Download ( )**
  This icon will allow you to download your my E-TRAC transaction page into Excel format. **Place the cursor in the E-TRAC transaction list and click this icon.** Follow the instructions in the dialog box to open and or save the file, as desired.

1.4. **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 transaction list.

Approvers will receive an e-mail message every time an E-TRAC requester has submitted a transaction that requires approval. This e-mail will include a link to the E-TRAC transaction. If you are already logged into PeopleSoft and click on the link provided in the email notification, you will be directed to the corresponding E-TRAC transaction page in the email. If you are not logged into PeopleSoft the link provided will direct you to the log-in page. After logging into the system you will be directed to the corresponding E-TRAC transaction page pending approval.

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.

---Original Message-----
From: MBRFTST@calstate.edu [mailto:MBRFTST@calstate.edu]
Sent: Thursday, September 19, 2003 2:08 PM
To: strstruer@calstate.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 61157 has been approved by HR and loaded into the HR system.

Please follow the link to log into E-TRAC.


---------------------------------------------------------------

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

Figure 1-8 Sample e-mail

1.5. 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.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begins with</td>
<td>Search by an initial letter or number</td>
</tr>
<tr>
<td>Contains</td>
<td>Search by a group of characters</td>
</tr>
<tr>
<td>=</td>
<td>Search by using an exact set of characters (alphanumeric)</td>
</tr>
<tr>
<td>Not =</td>
<td>Search by excluding an exact set of characters</td>
</tr>
</tbody>
</table>

Requesting Staff and MPP Transactions in E-TRAC 1-7
< 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

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

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set ID</td>
<td>Set ID defaults to SFCMP. This is the ID for San Francisco State University.</td>
</tr>
<tr>
<td>Department</td>
<td>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.</td>
</tr>
<tr>
<td>Description</td>
<td>You may search by the description of the position</td>
</tr>
<tr>
<td>Company</td>
<td>SF for San Francisco State University.</td>
</tr>
<tr>
<td>Location Set ID</td>
<td>SFCMP for San Francisco State University campus.</td>
</tr>
<tr>
<td>Location Code</td>
<td>Criteria for Location are ORSP, Off Campus and On Campus.</td>
</tr>
</tbody>
</table>
1.5.2. **Basic Search**

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set ID</strong></td>
<td>This will always default to SFCMP</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>A description is the name that you would use to override the Title if needed.</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>SF for San Francisco State University.</td>
</tr>
<tr>
<td><strong>Location Set ID</strong></td>
<td>SFCMP for San Francisco State University campus.</td>
</tr>
<tr>
<td><strong>Location Code</strong></td>
<td>Criteria for Location are ORSP, Off Campus and On Campus.</td>
</tr>
</tbody>
</table>
1.6. 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.

1.6.1. Advanced Search

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

<table>
<thead>
<tr>
<th>Values</th>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>You may search by position number. The position number is a unique number that is assigned to individual employees.</td>
</tr>
<tr>
<td>Description</td>
<td>Description is a title that is given to a position based on the CSU Salary Job schedule.</td>
</tr>
<tr>
<td>Position Status</td>
<td>You may search by position status given these criteria: Approved, Frozen, Proposed.</td>
</tr>
<tr>
<td><strong>Business Unit</strong></td>
<td>Business Unit will always be SFCMP.</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>You may search based on Department ID.</td>
</tr>
<tr>
<td><strong>Job Code</strong></td>
<td>The Job Code is the four digit number that corresponds to a specific position.</td>
</tr>
<tr>
<td><strong>Reports To Position Number</strong></td>
<td>You may search for position that report to a specific position.</td>
</tr>
</tbody>
</table>

**Position History**

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

1.6.2. **Basic Search**

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

<table>
<thead>
<tr>
<th><strong>Values</strong></th>
<th><strong>Search Criteria</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position Number</strong></td>
<td>You may search by position number. The position number is a unique number that is assigned to individual employees.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Description is a title that is given to a position based on the CSU Salary Job schedule.</td>
</tr>
<tr>
<td><strong>Position Status</strong></td>
<td>You may search by position status given these criteria: Approved, Frozen, Proposed.</td>
</tr>
</tbody>
</table>
### 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](image)

**Search by:**
- **Position Number**
- **began with**

[Search][Advanced Search]

---

**Figure 1-12 Positions History basic search function**

---

1.7. **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.

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

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Can search by any name that appears in the system</td>
</tr>
<tr>
<td><strong>National ID</strong></td>
<td>National ID is the social security number associated with the employee.</td>
</tr>
<tr>
<td><strong>Employee ID</strong></td>
<td>You may search by the Employee ID which is the same as SFSU ID number.</td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
<td>You may search by the employee’s last name.</td>
</tr>
</tbody>
</table>
Using E-TRAC

**First Name**  You may search by the employee’s first name.

<table>
<thead>
<tr>
<th><strong>Search Criteria</strong></th>
<th><strong>Definition</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Can search by any name that appears in the system.</td>
</tr>
<tr>
<td><strong>National ID</strong></td>
<td>National ID is the social security number associated with the employee.</td>
</tr>
<tr>
<td><strong>Employee ID</strong></td>
<td>You may search by the Employee ID which is the same as SFSU ID number.</td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
<td>You may search by the employee’s last name.</td>
</tr>
<tr>
<td><strong>First Name</strong></td>
<td>You may search by the employee’s first name.</td>
</tr>
</tbody>
</table>
1.8. 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.

1.8.1. 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.

1.8.1.1. 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 three 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.

1.8.2. How to Change your password

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

![Change Password](image)

Figure 1-15 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.

1.9. Approval Chain

Approval chains are available to view through the HRMS home page. An approver chain is a hierarchical system within a department that ensures the integrity of any given E-TRAC transaction. The Approver Chain View is available for you to see the name of the next approver in your department.

1.10. Approver Chain View

Approver chains are available to view through the HRMS home page.
1. To view the approver chain for your department click SFO Self Service > E-TRAC > Inquire > Approval Chain View.

![Approval Chain View](image)

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

- **Find an Existing Value**
- **Search by:** Department ▼ begins with 6047
- **Search** Advanced Search

Figure 1-16 Approval Chain search view

2. Once you click Approval Chain View, the Approval Chain View page will display.

3. Select Department from the Search by menu, and type your department number in the box.

The view of authorized approvers for your department will appear.
To conduct other searches, click **Return to Search** at the bottom of the page.

### 1.10.1. Types of Approvers

#### 1.10.1.1. Pooled Approvers

Pooled Approver type is a level in the approval hierarchy that may accommodate one or more approvers. This is set up so that if one approver cannot approve a transaction, it may be approved by the second approver. This is not the same as an alternate approver.

#### 1.10.1.2. Individual Approvers

An individual approver type is a level in the approval chain the can accommodate only one approver. Once this individual approves the E-TRAC transaction, it is work flowed to the next person in the approval chain.

#### 1.10.1.3. Alternate Approvers

Approvers may designate alternate approvers to review, submit, or reject, their transactions in the event that the department approver is not able to. The alternate approver can be anyone designated by the approver, however they must have attended one of the two E-TRAC training classes and be a current user of the system with their...
own user ID and password. Alternate approvers are established for a particular date range. During this time both you and your alternate will receive the worklist items. In the event that any of the worklist items are not reviewed, accepted or rejected, then they will be available in your My E-TRAC Transactions section when you return.

To assign and alternate approver you must contact the Help Desk (5-HELP or fivehelp@sfsu.edu), and request an alternate approver.

1.10.2. Customizing Your Department Approval Chain

You may designate an approval chain for different types of E-TRAC transactions. For example, you may want student related transactions to follow one chain, and faculty related transactions to follow another. In order to change your Department Approval Chain you must download and complete the Action Request Form from the San Francisco State University Information Systems Projects website, www.sfsu.edu/~cms. You can find the form under HRMS Forms and follow the directions for applying and submitting the request.

You must ensure that the current approver approves or rejects all E-TRAC transactions in their worklist. If they do not and the approver chain is altered, then the pending E-TRAC transactions will be lost.

1.11. 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.