3. Requesting a New Position

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 have 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 job code 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, and job code), 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 **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.

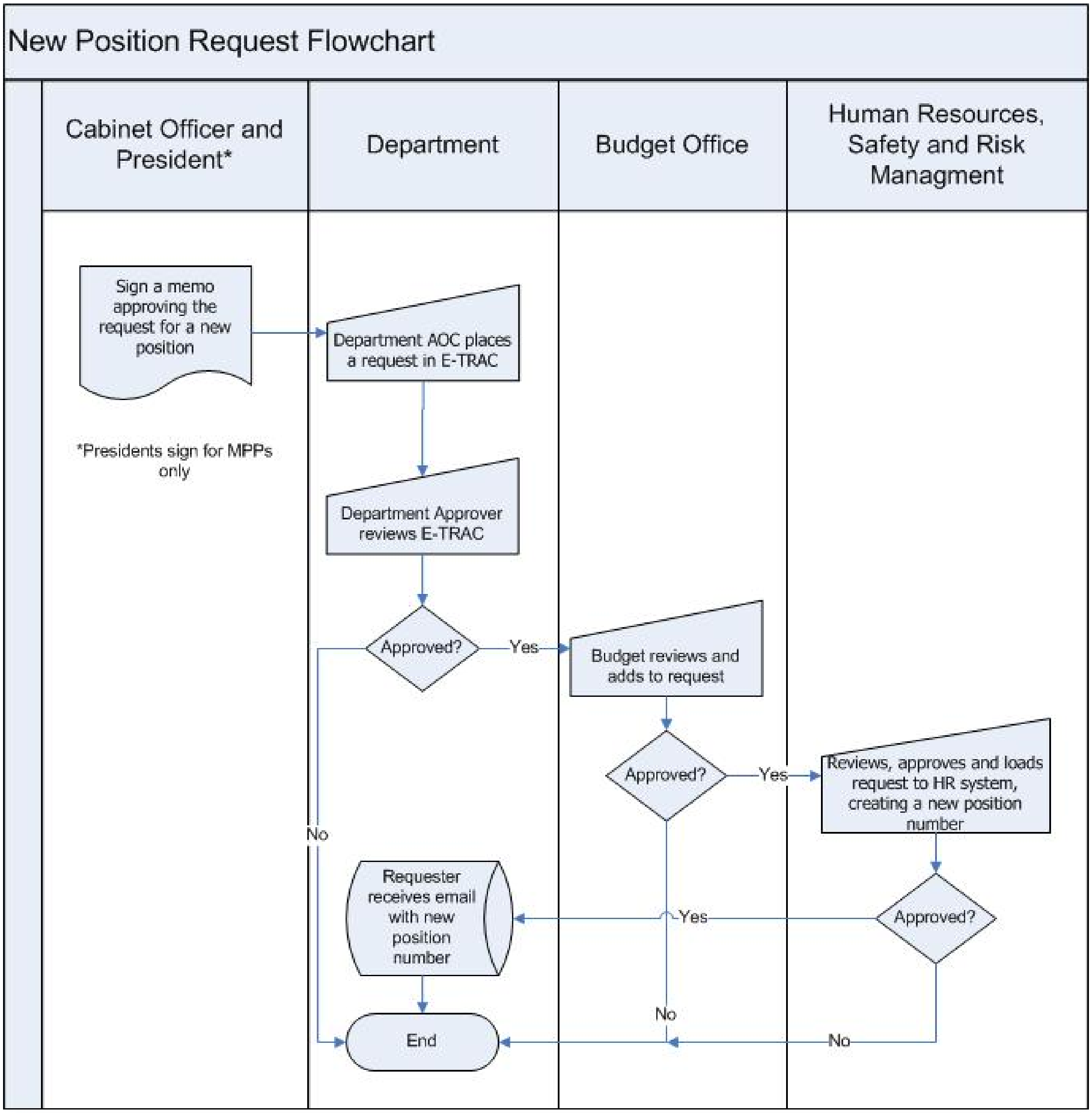
3 If there is a need for a new position, the request is completed and submitted for approval.

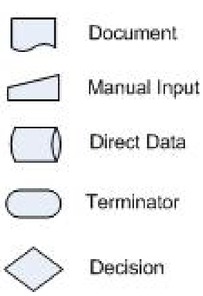
4 Department approvers review and approve the new position request. Approvers are required to either approve or reject each transaction. If a transaction is rejected, it is closed to any further updates and cannot be reused.

5 Budget Office approves and adds to the request.

6 HR Services reviews, approves and loads the request to the HR system, creating a new position number. Additional forms may be required, such as a draft position description or position summary.

7 Once HR approves the New Position Request E-TRAC, the requester receives an e-mail notification that includes the new position number.


New Position Request Flowchart
Cabinet Officer and President*
Department
Budget Office
Human Resources, Safety and Risk Managment
Sign a memo approving the request for a new position
*Presidents sign for MPPs only
Department AOC places a request in E-TRAC
Department Approver reviews E-TRAC
Approved?
Yes
No
Budget reviews and adds to request
Approved?
Yes
No
Reviews, approves and loads request to HR system, creating a new position number
Approved?
Yes
No
Requester receives email with new position number
End


Document
Manual Input
Direct Data
Terminator
Decision

3.3. 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.

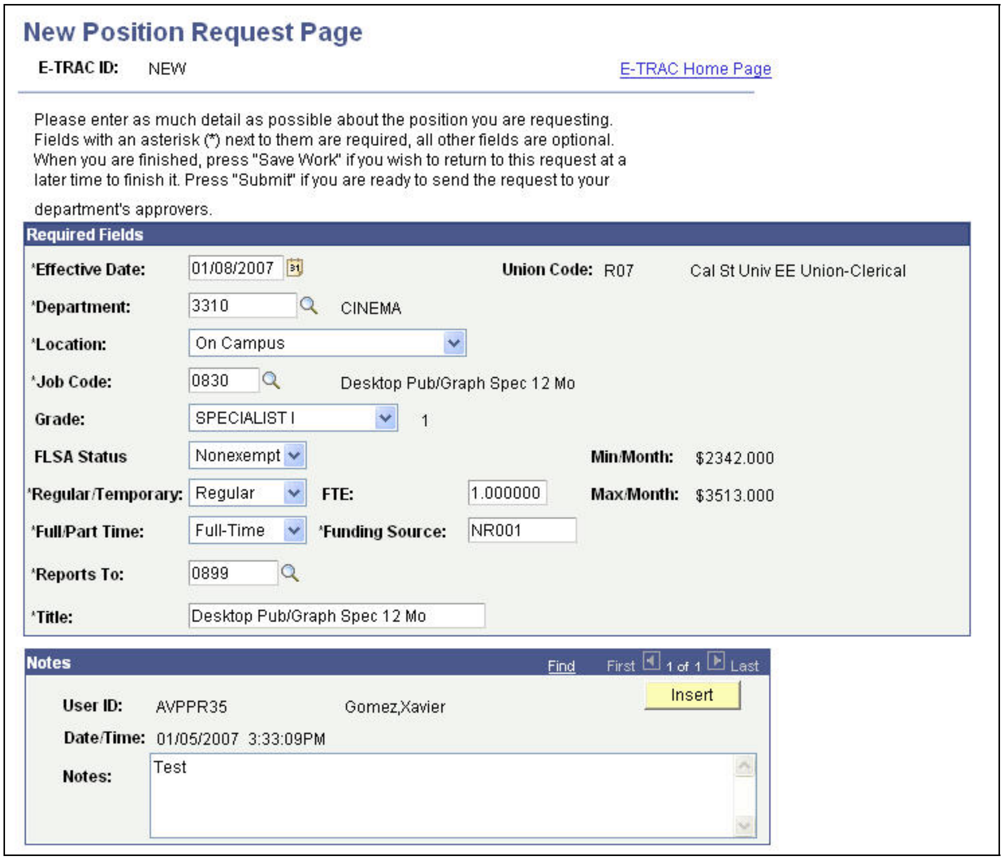


Figure 3-1 New Position Request Page

3.4. New Position Request

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.

There are two ways to get to the New Positions Request page: through the E-TRAC Home page or through the E-TRAC transactions menu.

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 appears.

3.4.1. Vacant Position Inquiry

1. Select **Home > SFO Self Service > E-TRAC > E-TRAC Home > E-TRAC Home > Vacant Positions.**

Note: You may also access Vacant Positions by clicking the link Vacant Positions under the Tasks menu.

2 Click Vacant Positions in the Reference section of the E-TRAC Home page.

3 When the Vacant Positions search page appears, enter the necessary search criteria in order to locate the department for which you would like to view the vacant position, and click **Search**.

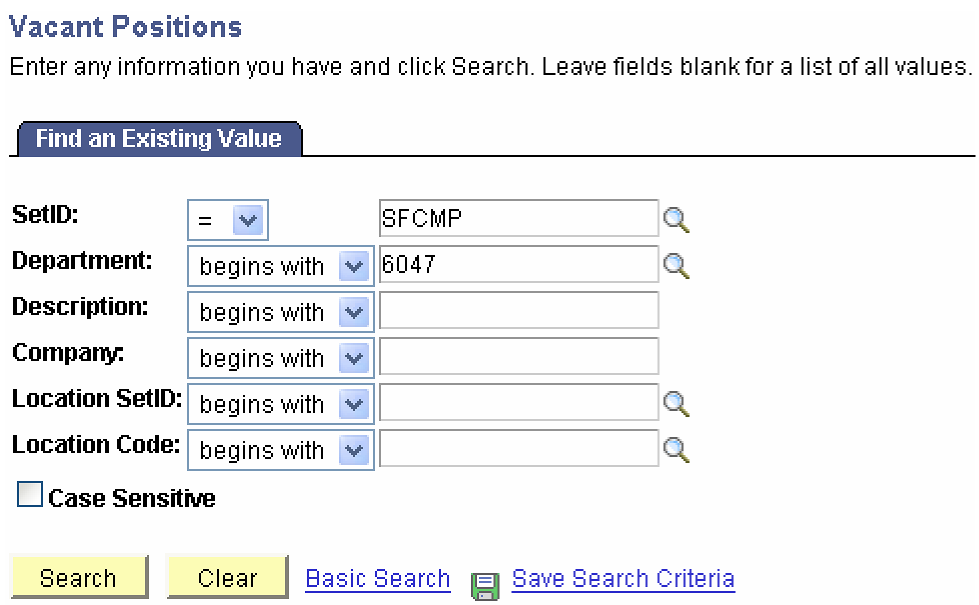


Figure 3-2 Vacant Positions Inquiry search page

Eventually the four digit department number may become familiar to you and you will only need to enter it into the **Dept** field box.

Note: You will only be able to view one department at a time, and only the departments for which you have security access.

4 Click the link from the resulting list. The Vacant Positions tab will display. Review the report to verify that the position is not in the system—double check by conducting a Position History Inquiry. This will tell you whether the position exists **AND** has an employee associated to it.

3.4.2. Position History Inquiry

1 Click **Home > SFO Self Service > E-TRAC > Inquire > Position History.**

2 Type the **department number** for which you would like to see the position history and click **Search.** The number at the far right corner is the total number of positios for the department you selected.

3 From the **Search Results** list, select the position that you would like to view.

4 The **Position History** information displays, including the current incumbent or incumbents, unit, salary, position entry date or the day that they entered the position.

5 To view another employee on the search list, click the **Return to Search** button at the bottom of the page.

3.4.3. New Position Request

The next step in creating a new position in E-TRAC is to navigate to the correct E-TRAC page and enter information for the position.

There are two ways to get to the New Positions Request page: through the E-TRAC Home page or through the E-TRAC transactions menu.

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 appears.

3.4.4. New Position Request Page

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.

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

2 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.

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

4 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.

5 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.

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

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

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

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

10 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.

11 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 administrator in this list, change the search criteria to **Name**, and search based on the supervisor name.

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

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

14 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.

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

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

17 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.

3.4.5. 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.

3.5. 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.