

Preface

E-TRAC Training Guide and Environment

This guide was designed to provide guidance and instruction for working in the E-TRAC system. Many of the scenarios discussed and data used may not be relevant to the way your department may use E-TRAC. Therefore, the examples provided are for instructional purposes only and are not meant to replace the evaluation of personnel activities, steps outside of the system, and communication that must still take place between you and your HR Services representative.

The data in the training environment contains both real and fictitious data. All sensitive information has been masked.

About this Guide

This manual is updated occasionally to reflect changes made in Human Resources Management System (HRMS) functionality. Updates will be communicated to the user community. For the most current version of this manual visit the Human Resources Information Systems Projects website www.sfsu.edu/~cms.

Course Objectives

This class is designed to introduce you to E-TRAC and to help you learn about the basic concepts for requesting the four types of E-TRAC transactions. This training session will cover new Human Resources, Safety and Risk Management processes, working in the E-TRAC system, and new terminology. Other materials will be available in this course guide and on the SFSU CMS website for your reference. This course does not cover all Human Resources, Safety and Risk Management procedures. We will discuss other resources and training materials available to you later on in this session.

Overview

The *Requesting Transactions in E-TRAC: Staff* course manual explains how to perform workforce related approvals in E-TRAC.

Audience

This guide is intended for academic office coordinators and others responsible for approving hires, vacant position changes, new positions, and employee changes within the E-TRAC system.

Assumptions

The information and instructions in this manual are presented to you with the assumption that you are familiar with the previous CSU Human Resources procedures and terminology.

Additional documentation

In the back of this guide you will find the *E-TRAC Action-Reason/107 Reference Guide* which explains the action-reason combinations and how they relate to certain E-TRAC transactions and the previous HR system.

Help

If you need help with requesting or approving an E-TRAC transaction you may dial the E-TRAC Help Desk from on-campus at **5-Help (5-4357)**, or by e-mail at **fivehelp@sfsu.edu**.

Conventions

Human Resources, Safety and Risk Management: This department will be referred to as Human Resources.

Text that you type: Text that the user types will be bold.

Field Names: Field names will appear as bold.

Menu Items: Menu items will appear as bold.

Links: Links will appear as underlined.

Buttons: Buttons in E-TRAC will appear as bold.

Page titles: Page titles will be bold unless the terminology merely describes the page. For example **Employee Hire Request** page is bold, however E-TRAC home page is not.

These conventions might appear in the manual as in the following example.

- 1 Navigate to the E-TRAC home page: **Home > SFO Self Service > E-TRAC > Use > E-TRAC Home**.
- 2 From the E-TRAC home page select **Employee Change** and click **ADD**.
- 3 The **Employee Change Request Page** appears. Type an effective date in the **Effective Date** field.

About E-TRAC

The Human Resources, Safety and Risk Management Department and Division of Information Technology (DoIT) at San Francisco State University have developed a new Human Resources system that involves business processes for staff and MPP (Management), faculty and student transactions.

Previously, SFSU's business processes for employee transactions required that departments manually type carbonless forms that proceeded through a three-level process. The three-level process was comprised of obtaining multiple signature approvals, transaction validation by Human Resources department, and funding verification by the Budget Office.

Human Resources leadership recognized the opportunity to re-evaluate the method by which these transactions were initiated by the campus departments and colleges.

From these implementation discussions came the idea for E-TRAC (Employee Transaction Relay and Capture). E-TRAC is a new web-based method by which position requests, employee appointments and job changes will be requested by the campus. It replaces the paper-based position request Forms that were previously used for MPPs and staff, faculty and student employees.

This system is unique to SFSU and will make it easier and more efficient to submit transactions, receive approvals by department administrators, and track the status of items once they are submitted.

System Requirements

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

HRMS (Human Resources Management Systems)/ 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 6 on Windows XP
- ◆ MS Internet Explorer 5 on Mac OS 7.5 and above