2.   Managing E-TRAC Transactions

This chapter explains how to manage E-TRAC Transactions in the E-TRAC home page.

This chapter contains the following sections:

2.1.   Managing E-TRAC Transactions

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 log-in page. After logging into the system you will be able to access the E-TRAC transactions pending approval from the E-TRAC home page. You can view transactions pending approval in from the E-TRAC home page in the My E-TRAC Transactions section.

```
-----Original Message-----
From: H8SFPRO@calstate.edu [mailto:H8SFPRO@calstate.edu]
Sent: Thursday, September 25, 2003 11:32 AM
To: etracapprover@sfsu.edu
Subject: E-TRAC #00000075 is in your worklist


This email is to notify you that E-TRAC number 00000075 requesting a
Employee Hire for Department 3627 is awaiting your approval.  This item will
remain in your worklist until you have either approved or rejected the
transaction.

Please follow the link to log into E-TRAC.

https://cmsdev.calstate.edu:4196/servlets/iclientservlet/h8sftst/?ICType=Pan
el&menu=SFO_ROLE_MANAGER&market=GBL&panelGroupName=SFO_ETRAC_HIR&SFO_ETRAC_I
D=00000075
------------------------------------------------------------------------
----
This e-mail message brought to you by E-TRAC workflow technology.
```

Figure 2-1 Example of e-mail notification

2.2.   Locating an E-TRAC

Once an E-TRAC has been saved or approved, you can track its status at any time. There are three methods of locating a submitted E-TRAC: **Sort/Filter My E-TRAC Transactions** in combination with **My E-TRAC Transactions**.
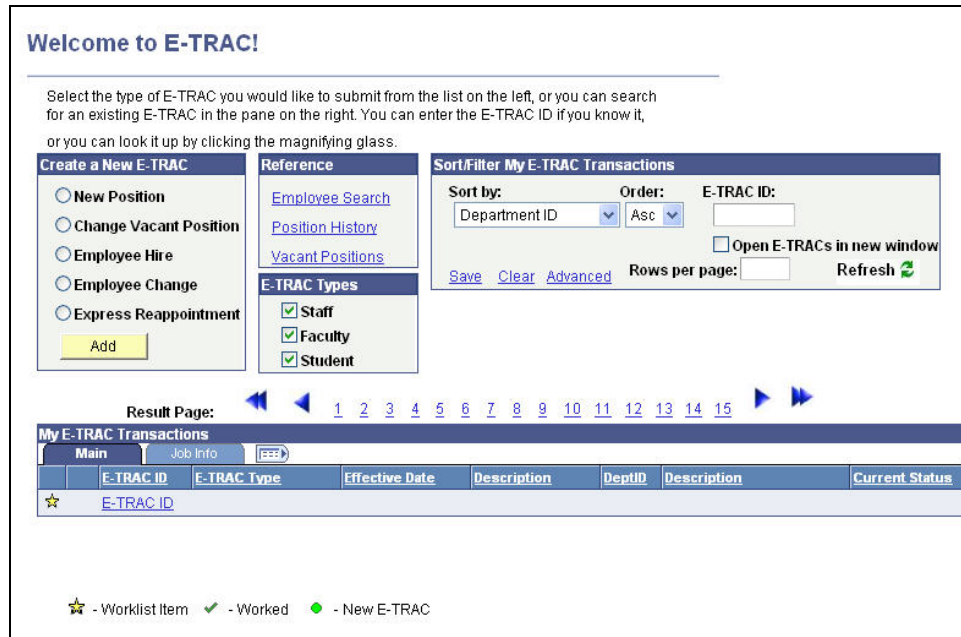
Figure 2-2 E-TRAC Home page

2.2.1. Viewing your E-TRAC Transactions

The first and simplest way to do this is by reviewing your transactions in the My E-TRAC Transactions section at the bottom of the home page, sorted or filtered by the Sort/Filter 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 Sort/Filter My E-TRAC Transactions section: one in the basic mode, and the other in the advanced mode. Notice that both modes contain links at the bottom. The basic mode contains Save, Clear, and Advanced. The advanced mode contains Save, Clear, and Basic.

2.2.1.1. Basic Mode

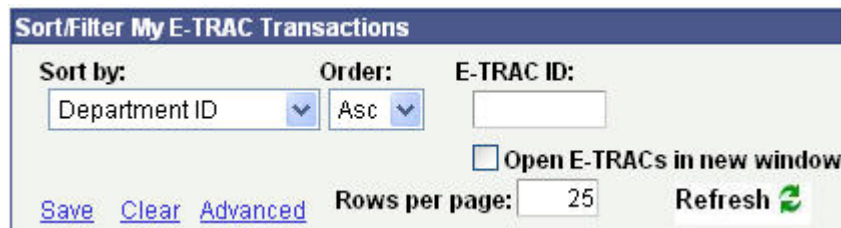The basic setting for SFMET contains only one sorting field box.

Figure 2-3 Sort/Filter My E-TRAC Transactions in Basic mode

- **Sort by**
  You may sort the Sort by drop down menu using the following criteria: **Current Status, Department Description, Department ID, Effective Date, E-TRAC Description, E-TRAC ID, E-TRAC Type, Status Date Time,** and **Worklist Item.**

- **Order**
  You may sort the E-TRAC transactions in ascending or descending order.

- **E-TRAC ID**
  If you know the E-TRAC ID of the transaction you are seeking, you can type the ID in this field and press the TAB key to locate the transaction.

- **Open E-TRACs in new window**
  Selecting **Open E-TRACs in new window** allows you to view an E-TRAC in a separate window from the E-TRAC home page. You may be able to open various E-TRAC Transactions form the My E-TRAC Transactions section at the same time.

Note: Once you are done with that particular E-TRAC Transaction, **DO NOT** click the link **Go Back To E-TRAC Home Page**. In order to avoid confusion by having multiple windows open, simply close the window by clicking the **X** button at the top of your window.

IMPORTANT: You will notice that the transaction is still viewable in the worklist under My E-TRAC Transactions section. In order to remove the transactions you had just submitted, click the Refresh ⟳ button and the transactions will be removed from your worklist.

- **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.

- **Advanced**
  This link will open the advanced mode.

2.2.1.2. Advanced Mode

Unlike the basic mode, the advanced mode has two sort by boxes. The advanced mode also has two filters, one for E-TRAC description, and another for department.

Figure 2-4 Sort/Filter My E-TRAC Transactions in Advanced mode

- **Sort by**
  In the Sort by field you may sort by the following criteria: **Current Status, Department Description, Department ID, E-TRAC Description, E-TRAC ID, E-TRAC Type, Status Date Time,** and **Worklist Item.**

- **Refresh**
  Use the Refresh button to execute any Sort by and/or Find E-TRAC Type criteria entered to customize the view of transactions in the My E-TRAC Transactions list. Set all sort criteria and then click the Refresh button to execute the Sort by, Find, E-TRAC Type command(s). Once you have set the criteria for My E-TRAC Transactions list to your preferences, you may click **Save**. Your transaction list will default to this setting each time you access the E-TRAC Home page. If however you wish to temporarily see a different view from your saved (default parameters), change the Sort by, Find, E-TRAC Type settings and click the **Refresh** button. Clicking the **Refresh** button does not permanently reset your saved settings, it only applies these settings temporarily (unless you click **Save**). In order to view saved (default) settings again, navigate out of the E-TRAC home page and reopen it to view your original settings.

- **Order**
  You may sort the E-TRAC transactions in ascending or descending order.

- **E-TRAC ID**
  If you know the E-TRAC ID of the transaction you are seeking, you can type the ID in this field and press the TAB key to locate the transaction.

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

- **Include Completed**
  This checkbox can be selected to view all E-TRACs for your department, including those that have been fully approved by Human Resources.

- **Then By**
  After you have chosen the first sort by value, you may then choose a second sort by value. Those values are the same as in the first sort by box. The order remains ascending or descending as well.

- **Dept ID filter**
  You may choose to view your E-TRAC transactions based on department number only.

- **Find filter**
  You may enter any numbers or letters to find a certain transaction. For example, if you type **Instr Fac** in this box and press TAB you will see E-TRAC transactions that deal with temporary instructional faculty.

- **Rows per page**
  Rows per page allows you to view your worklist items by a limited number per page. If you had 100 worklist items you can type 50 in the **Rows per page** box in order to view 50 items at a time which will give you 2 pages to view. Note: the more items you have set to appear on a page, it may take longer for the page to display.

2.2.2. My E-TRAC Transactions

E-TRAC transactions in the My E-TRAC Transactions section appear at three stages of the E-TRAC process. Refer to Section 1.3 for icon descriptions.

E-TRAC ID	E-TRAC Type	Effective Date	Description	DeptID	Description	Current Status
✔ 00030483	Express Reappointment		Faculty Reappts - AY, SPR 2006	3600	GEOSCIENCES	
✔ 00030413	Express Reappointment		Faculty Reappts - AY, SPR 2006	3190	SOCIOLOGY	
✔ 00030473	Express Reappointment		Faculty Reappts - AY, SPR 2006	3185	PSYCHOLOGY	
✔ 00030491	Express Reappointment		Faculty Reappts - AY, SPR 2006	3600	GEOSCIENCES	
✔ 00030479	Express Reappointment		Faculty Reappts - AY, SPR 2006	3185	PSYCHOLOGY	
✔ 00030463	Express Reappointment		Faculty FTE (Timebase) Changes, SPR 2006	3490	CREATIVE WRITING	
✔ 00030395	Express Reappointment		Faculty Reappts - AY, SPR 2006	3600	GEOSCIENCES	
✔ 00013745	Employee Hire	01/25/2005	Levin,Rachel	3300	BROADCAST COMMUNICATION ARTS	
✔ 00030494	Express Reappointment		Faculty Reappts - AY, SPR 2006	3600	GEOSCIENCES	
✔ 00030469	Express Reappointment		Student Reappts, SPR 2006	6180	DRF-ADMIN SERVICES	

Figure 2-5 My E-TRAC Transactions with pending transactions. Note that these are not student transactions.