3. Approving E-TRAC Transactions

This chapter explains how to approve transaction requests for Staff, MPP (management personnel plan), Faculty, and Student Employees.

This section contains the following sections:

3.1.   Approving E-TRAC Requests

Designated approvers will receive an e-mail message each 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 PeopleSoft. If you are not logged in to PeopleSoft the email link provided will direct you to the PeopleSoft log-in page. After logging into the system you will be directed to the corresponding E-TRAC transaction page pending approval.

```
-----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.
```

You may also access transactions for approval by logging into PeopleSoft and accessing transactions through the E-TRAC Home Page, under "My E-TRAC Transactions". Transactions that are awaiting approval are denoted with a yellow star (fig 3-1)

E-TRAC ID	E-TRAC Type	Description	DeptID	Description	Current Status	Status Date & Time
☆ 00002178	Employee Hire	Borboa,Cynthia	4060	EOP	Approved by Budget	04/15/2004 2:08:11PM

Figure 3-1 My E-TRAC Transactions

1   Click the 8-digit id number under E-TRAC ID link.

A Request Page will display, for example the New Hire Request Page.

New Hire Request Page

SSN: xxx-xx-1212

E-TRAC ID: NEW   EmplID:900611353   E-TRAC Home Page

Please enter as much information about the new hire you are requesting. Fields with an asterisk (*) next to them are required, all others are optional.

Personal Information

*Effective Date:	06/01/2007
*First Name:	Patrick
Middle Name:	Maina
*Last Name:	Wachira
*Country:	USA United States
*Address Line 1:	1600 Holloway Ave
Address Line 2:	
City:	San Francisco State: CA California
Postal Code:	94132

Active Job Records

Position Information

*Position Number:	00004958 Instr Fac AY
Department:	3250 FINANCE
WTU:	15.00000 Fraction: 1/1
*FTE:	1.000000 Job Code: 2360 Instr Fac AY
*Empl Class:	Temporary
Appt Dur:	1 Year
*Appt End:	05/01/2008
Sal Plan:	321 R03 Salary Plan 21
Salary Grade:	1 ASSISTANT
Rate Code:	CSUMTH
Comp Rate:	$2654.000000 USD Min: $2654.000 Max: $3076.000

Notes

First ◀ 1 of 1 ▶ Last   Insert

User ID: TRN62
Date/Time: 10/24/2003 3:59:24PM
Notes:

Approval History

User ID	Approval Status	Status Date & Time
TRN22	Submitted by Creator	10/15/2003 3:02:50PM
TRN22	New E-TRAC	10/15/2003 3:02:49PM

Next Approver: Department Approver(s)

Save for Later   Approve   Reject

Figure 4-1 Position Change Approval page

2 Carefully review each E-TRAC transaction, including effective date, employee name (if applicable), transaction type, current and proposed values and any messages in the "Notes" section. If necessary, you may update any of the fields and click **Save for Later** without approving or submitting. When making changes to E-TRAC transactions, the E-TRAC creator and previous approvers, if any, receive an email notification of the change. Before approving/rejecting the transaction, you may add notes to the transaction by clicking the "Insert" button and typing into the text box. To approve the transaction, click **Approve** to route it to the approver. If you **Reject** a transaction, the E-TRAC creator and previous approvers, if any, receive an email notification. **Note:** once a transaction is rejected, it cannot be recovered or modified; the E-TRAC transaction must be recreated.