# MacTRAC – Creating a Requisition | September 2010

## EMPLOYEE CATEGORIES

Student employees are those employees enrolled in a degree program maintaining at least 60% of a full course load each term (or 40% for students with disabilities).

Casual employees work in a position having no specified schedule and that may be of indefinite duration. They have neither guaranteed hours per day or days of work per week; rather, they are contacted when work is available at which time they may elect to accept or decline the work opportunity.

Temporary employees work in a position with a duration of less than 12 months. Temporary employees are typically hired to cover for short-term leaves of absence, special projects and assistance during peak periods.

## LOGGING IN

Login in at: https://workingatmcmaster.hua.hrsmart.com/ats/career_center.php

Your User Login is your full McMaster email address.

Your password was assigned to you at the time your account was activated. If you have any questions please email mactrac@mcmaster.ca. Your password can be changed once you're logged onto the system from the Tools menu.

**There are six possible roles when using the MacTRAC Temporary Casual Hiring Tool:**

Initiator: Can create requisitions and route them through the approval process.

Hiring Manager: Can create requisitions, route them through the approval process, hire candidates and send offer letters. In some cases the Hiring Manager is also the Initiator. In most cases, the Hiring Manager serves as the department approver.

> ***Note:*** In MacTRAC, the Initiator and the Hiring Manager perform the same functions and the online views will most often appear as "HM".

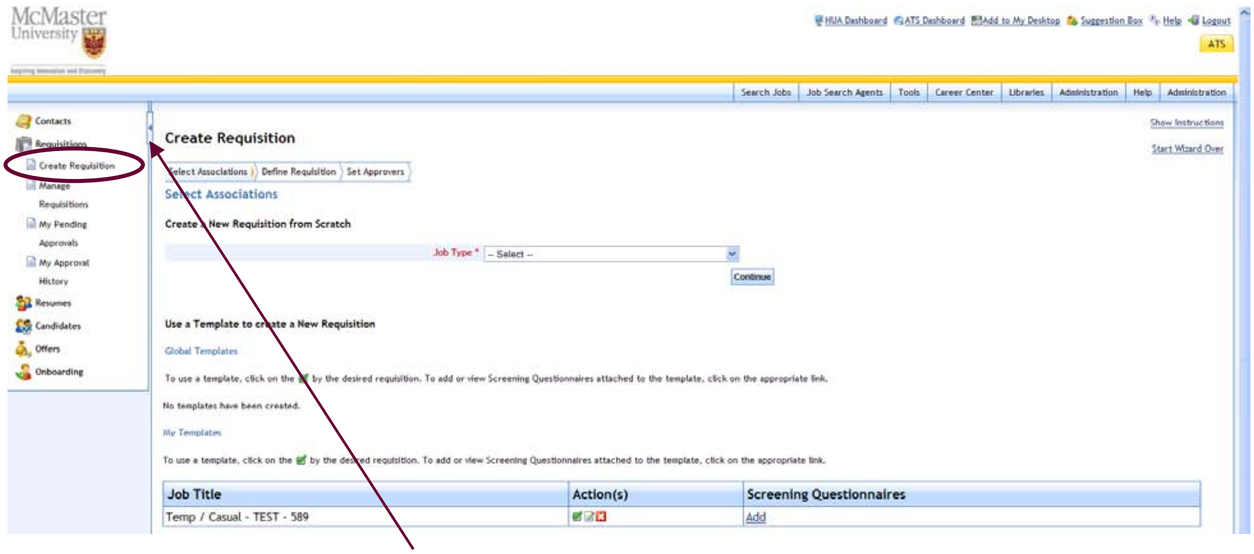
Recruiter: Responsible for the creation of the employee record in HRIS. This will be your normal Human Resources contact person. The Human Resources Advisor for your department can be found at: http://www.workingatmcmaster.ca/contacts/.

Department Approver(s): Individual(s) in your department with authority to approve requisitions to hire. This includes Research Grant holders (Principle Investigators).

Secondary Approver(s): Representative(s) from Budgeting Services, Office of Research Services and FHS Financial and FHS Research Finance. Responsible for confirming GL accounts and approving expenditures as detailed in the requisition.

## CREATING THE REQUISITION

1) From the menu at the left select Requisitions > Create Requisitions.




If the menu to the left does not appear, click on the small arrow at the top right of the left navigation bar. Clicking on this arrow collapses or expands the menu.

### CREATE REQUISITION OPTIONS

There are three ways to create a requisition: 1) from "scratch"; 2) using an existing job template; or, 3) finish a draft.

**Create a New Requisition from Scratch**

Option 1 on the Requisition Creation page allows you to create a new requisition from "scratch". This means that no current templates exist for this job, so you will begin by selecting the relevant Job Type for this position.

**Use a Template to Create a New Requisition**

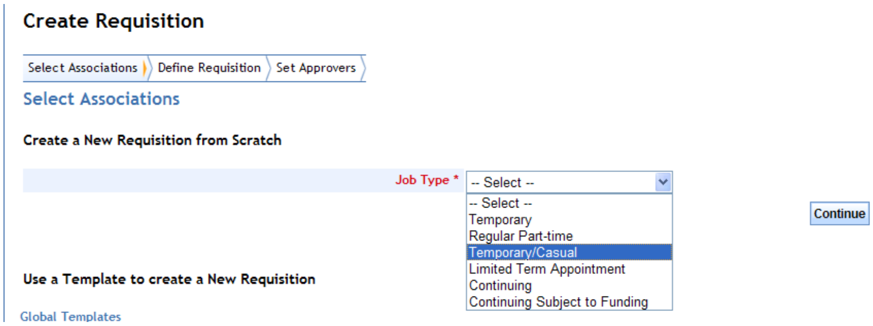
There are three types of templates available: "Global Templates", meaning all Users have access to use them (*this type of template is not currently being used*), "My Template", meaning only the person who created the template can use it and “My Drafts” which contain those requisitions “in progress”.

 = Click this icon beside the **template you wish to use** to create a requisition.

 = Click this icon to **edit** the template details.

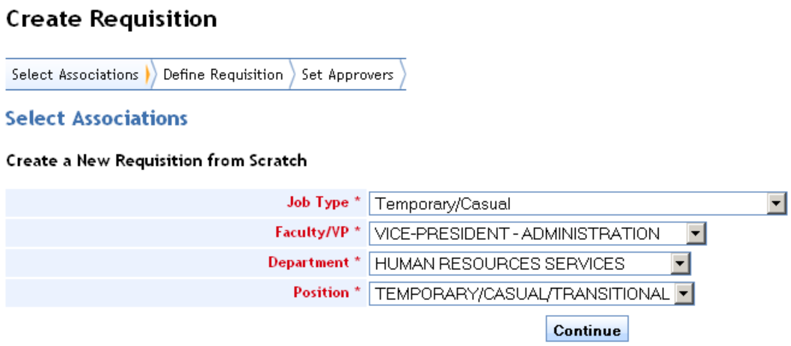
 = Click this icon to **delete** the template.

2) From the Job Type dropdown, select **[Temporary/Casual]**:




3) Once the Job Type is selected, three mandatory "Associations" fields will automatically appear. Make selections from the dropdowns appropriate for your department. Then click [Continue].

4)

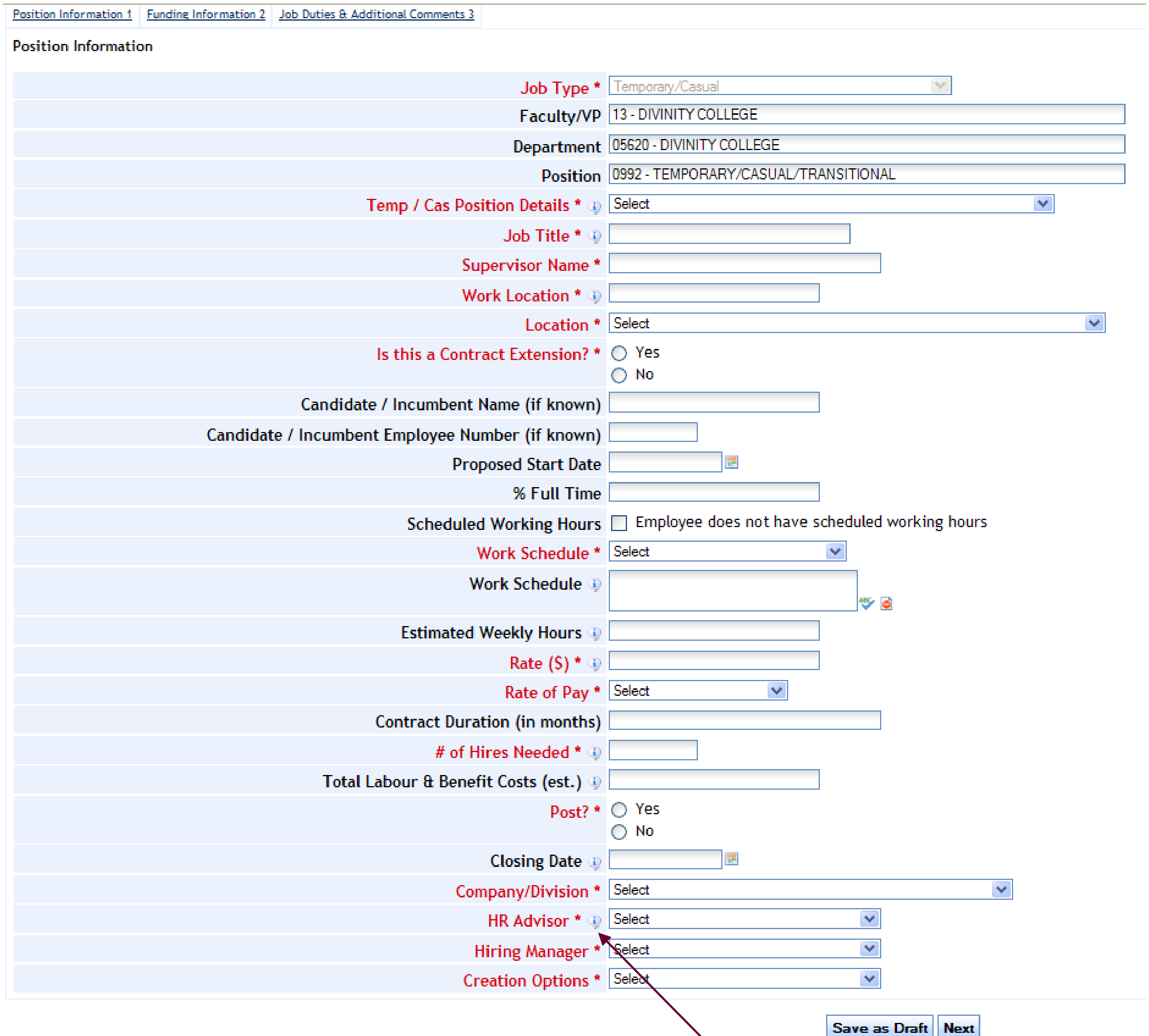



> ***NOTE:***
> Any field that appear in **red** with an asterix (*****) is MANDATORY.

You are now about to define the requisition. You will notice that there are three tabs:

- *Position Information 1*
- *Funding Information 2*
- *Job Duties & Additional Comments 3*

5) Entering Position Information 1:



Position Information 1 | Funding Information 2 | Job Duties & Additional Comments 3

Position Information

| | |
|---|---|
| Job Type * | Temporary/Casual |
| Faculty/VP | 13 - DIVINITY COLLEGE |
| Department | 05620 - DIVINITY COLLEGE |
| Position | 0992 - TEMPORARY/CASUAL/TRANSITIONAL |
| Temp / Cas Position Details * | Select |
| Job Title * | |
| Supervisor Name * | |
| Work Location * | |
| Location * | Select |
| Is this a Contract Extension? * | Yes<br>No |
| Candidate / Incumbent Name (if known) | |
| Candidate / Incumbent Employee Number (if known) | |
| Proposed Start Date | |
| % Full Time | |
| Scheduled Working Hours | Employee does not have scheduled working hours |
| Work Schedule * | Select |
| Work Schedule | |
| Estimated Weekly Hours | |
| Rate ($) * | |
| Rate of Pay * | Select |
| Contract Duration (in months) | |
| # of Hires Needed * | |
| Total Labour & Benefit Costs (est.) | |
| Post? * | Yes<br>No |
| Closing Date | |
| Company/Division * | Select |
| HR Advisor * | Select |
| Hiring Manager * | Select |
| Creation Options * | Select |

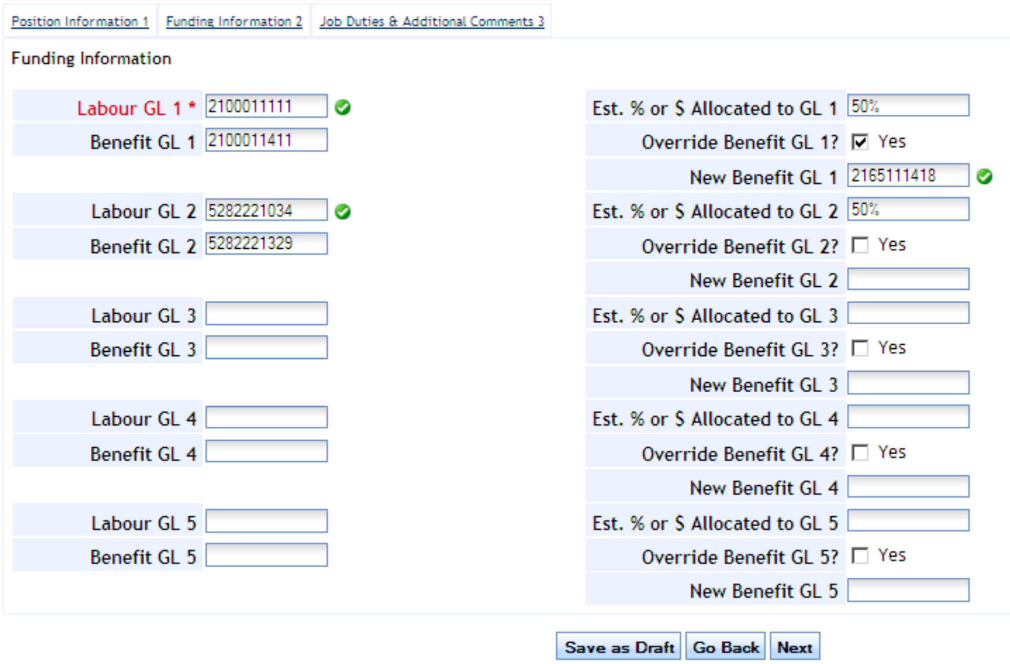
Save as Draft | Next

You will note that the first four fields are pre-populated. Also, all fields in **red** are mandatory. The following lists each field with general instructions:

***TIP!***
*Moving your mouse over this icon will display any additional information you might need about a field.*

| | |
|---|---|
| Faculty/VP | Pre-populated from selections above |
| Department | Pre-populated from selections above |
| Position | Pre-populated from selections above |
| Temp / Cas Position Details | Select from the dropdown the required position details, which includes the level, the required job name and the hourly rate range permissible (See note on Employee Categories above) |
| Job Title | Enter the Job Title as selected in the Temp / Cas Position Details field (previous dropdown) |
| Supervisor Name | Enter as required |
| Work Location | Enter the building and room number of where this position will report |
| Location | Select from the dropdown the appropriate campus / hospital location |
| Is this a Contract Extension [Yes / No] | Click on the radio button as appropriate |
| Candidate / Incumbent Name (if known) | If known, enter the name of the person you are going to hire |
| Candidate / Incumbent Employee ID (if known) | If applicable and known, enter the Employee ID of the person you are going to hire |
| Proposed Start Date | **Best Practices Note:** Use the calendar pop-up to choose the start date. Wherever possible choose a Monday! |
| % Full Time | Enter the percentage of a full time schedule this individual will be working |
| Scheduled Working Hours | Enter a check in the box if the employee **does not** have scheduled working hours. |
| Select the appropriate schedule | A dropdown list of the most common full-time schedules is provided. Select one of these schedules from the dropdown OR select "to be discussed with your supervisor" and indicate the work schedule below |
| Work Schedule | Enter the schedule to be worked by the employee if it is known, and "to be discussed with your supervisor" is selected from the dropdown above. (E.g. Mon to Wed 9:00 am to 12:00 noon, Thur 8:00 to 10:30 am) |
| Estimated Weekly Hours | Enter a number as appropriate |
| Rate of Pay | Select the Hourly (Salary and Special Premium Payment are also on the dropdown). Temporary / Casual position are paid hourly |
| Rate ($) | Enter the hourly, salary or special premium payment amount. The hourly rate entered must be within the range as presented in the Temp / Cas Position Details field above |
| Contract Duration (in months) | Enter 6 or less. Note that this hiring tool is only to be used for Temporary / Casual employees being hired for six (6) months or less ***OR*** who are employed on a casual basis with no set work schedule in which case the duration may be longer than 6 months |
| # of Hires Needed | Enter the number of hires needed. To use multiple hires, all position attributes must be identical, *i.e.* same GL, department, supervisor, etc. |
| Total Labour & Benefit Costs (est.) | Enter the estimated total amount of this hire requisition, including all applicable vacation pay |
| Post? [Yes / No] | MacTRAC is integrated with our job board (Careers@McMaster). The option to post a job is always available, though rarely used for temporary / casual positions |
| Closing Date | If Posting is selected, choose from the calendar pop-up a recommended closing date for the posting. |
| Company / Division | Select from the dropdown the appropriate "company / division" title for your department |
| HR Advisor | This is your HR contact. http://www.workingatmcmaster.ca/contacts**.** Faculty of Health Sciences: **Kathleen Manley** is the "HR Advisor" for temporary/casual hires |
| Hiring Manager | May be you or the relevant Hiring Manage if not you. |
| Creation Options | You have three choices:<br>• Create Requisition Only – use when the requisition is unique<br>• Create Personal Template Only – use for future requisitions<br>• Create Requisition and Personal Template – use to initiate a new hire and save the template for future use. This can be a very useful and timesaving approach |

6) Once all the required fields have been entered, click [Next]. You will arrive at the **Funding Information 2** screen:




This screen allows initiators to identify the Labour GL account(s) to be used. It also provides the ability to allocate funding across multiple GLs, and override Benefit GLs if necessary. The fields for GL accounts only recognize full 10-digit account numbers.

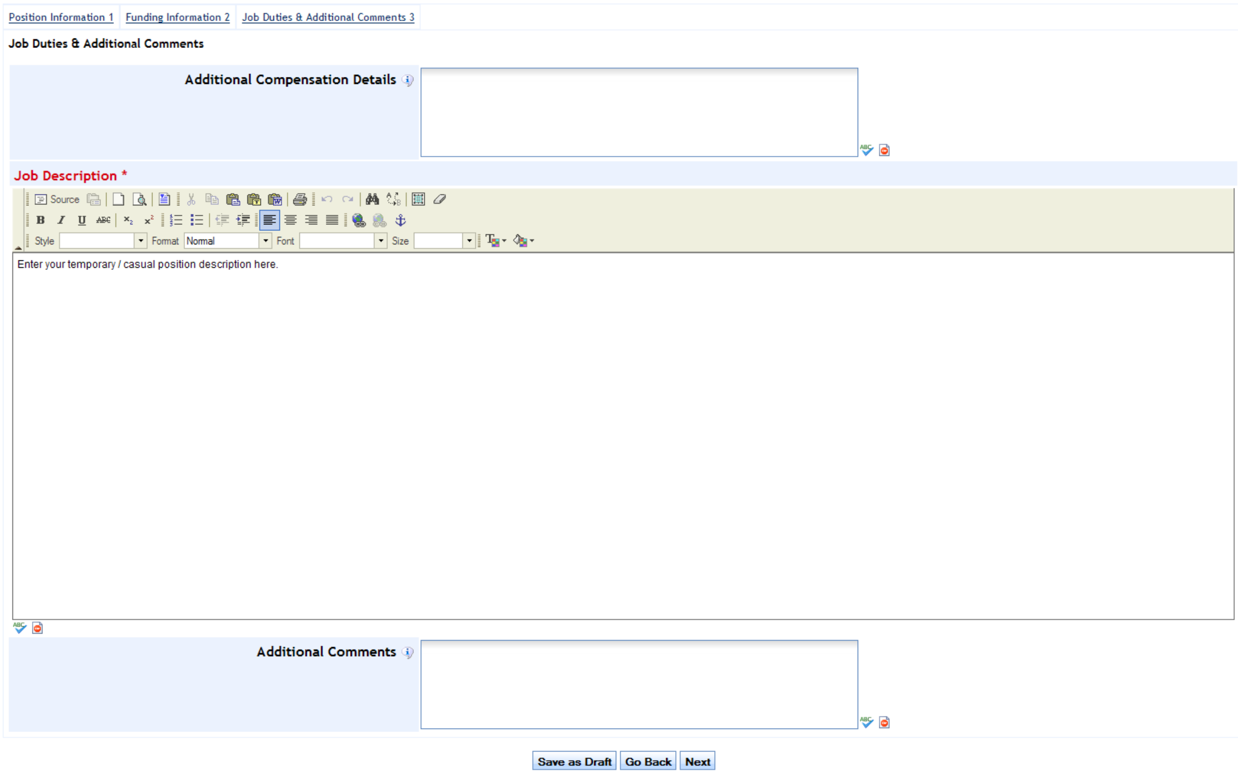
You must enter at least one Labour GL. If the number entered is valid, a check mark in a green circle will appear and its corresponding benefit GL account number will populate in the Benefit GL field.

If the Labour GL number is invalid, a minus sign in a red circle appears and no Benefit GL will be populated.

To override any default Benefit GL, place a check mark in the corresponding [Yes] box next to the question "Override Benefit GL #?" and enter a valid Benefit GL number. (You will note that in the example above Benefit GL 1 has been overridden.)

If costs are to be allocated to more than one Labour GL, be sure to enter for each GL the estimated percentage (with a percentage sign %) or a fixed dollar amount (with a dollar sign $).

7) Click [Next]. This will bring you to the Job Duties & Additional Comments 3 screen:



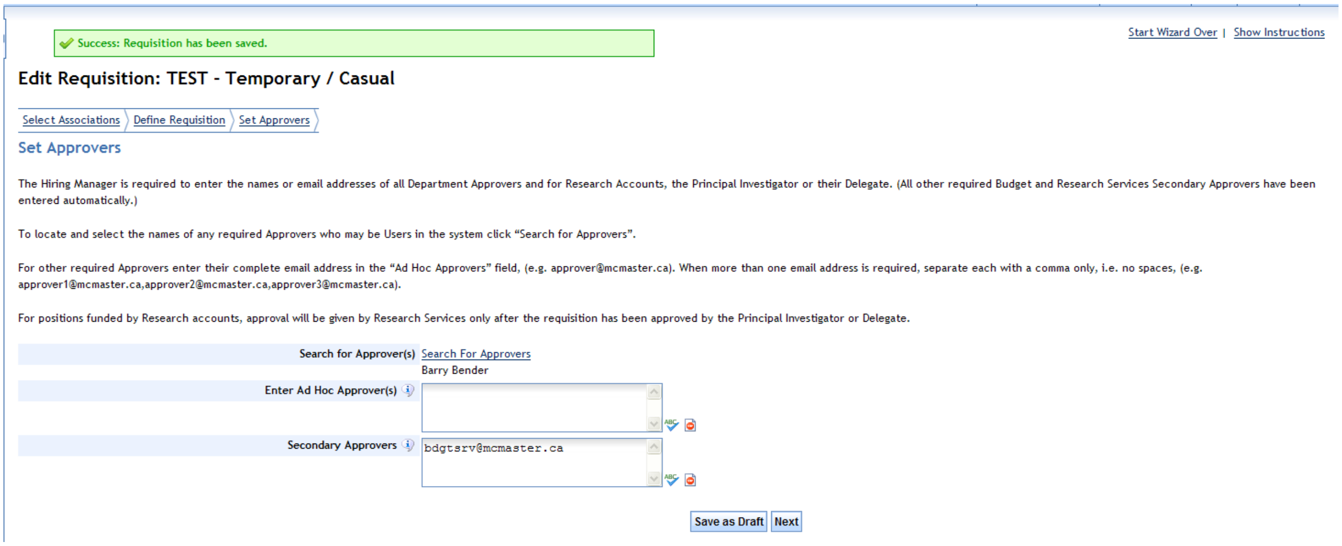

8) Enter any Additional Compensation Details, such as cell phone and travel expenses. Use full sentences as this field will populate the Offer Letter.

9) Enter the Job Description. This is a mandatory field.

   a. If you selected [Yes] to "Post?" this position, this field will form the posted job description and be presented to job seekers.
   b. If you selected [No] to "Post?" this position, this field will not be presented to the public, but will simply be used to communicate to Approvers and HR the job basic description.

10) Add Additional Comments for Approvers and HR as you wish or require and then click [Next].

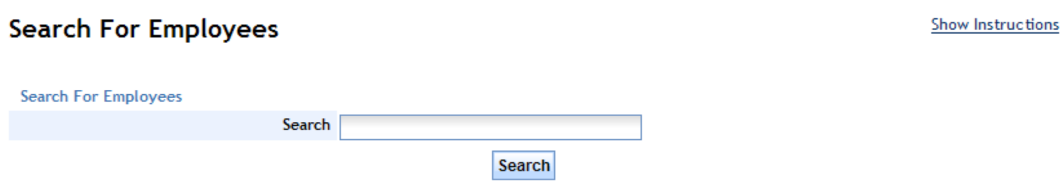
11) You will be brought to the "Set Approvers" screen:




At this point a notice appears informing you that this requisition has now been saved as a personal template *and* as a draft (for possible completion later). As well, all the required Secondary Approvers required by the Labour GLs you selected above have been entered (and are not editable).

As the note under the heading “Set Approvers” indicates, you may enter your Department Approvers either by searching for their names among the list of MacTRAC users, or you may enter their email addresses. **When entering multiple “Ad Hoc” email addresses, use complete email addresses, separated by commas and NO SPACES**.

To search for your Department Approvers among all MacTRAC users click on the link: Search For Approvers. The MacTRAC Search for Employees screen will open. Enter the required name in the Search field and click [Search].

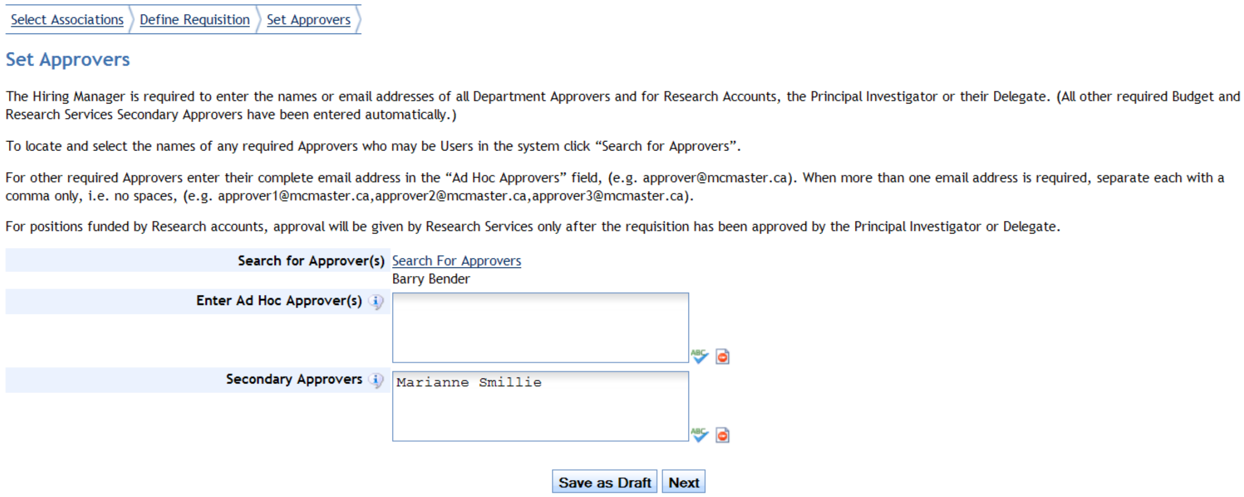



You will then be prompted to click on the plus sign in the green circle and then to click on [Confirm Selection].

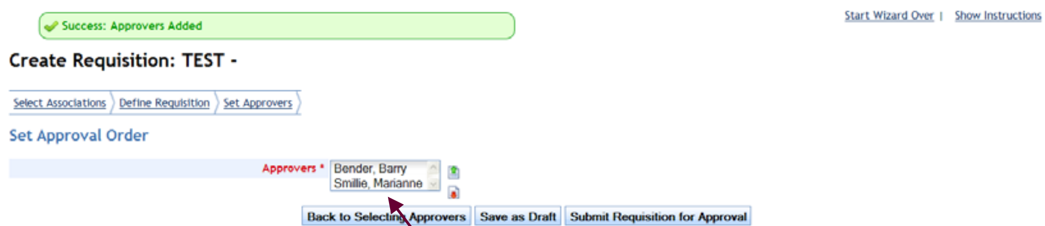
If you have selected a series of names you will also be able to remove any from your list of approvers by clicking on the delete icon before confirming selection.

***Note:*** You must enter at least one “department” approver and, as the instructions on the page clearly state: for positions funded by Research accounts, you must enter the Principal Investigator or Delegate before approval will be given by Research Services.

12) You will return to the “Set Approvers” screen with your selected Department Approver(s), any ad hoc approver’s email addresses and the email addresses of the Secondary Approver(s):




13) If correct and complete, click [Next]. You will be presented with the "Set Approval Order" screen which will inform you (in a green banner) that you have successfully added approvers:




From this screen you may alter the order of approvers by clicking on the approver name and moving them up or down in the approver order using the green up arrow icon or the red down arrow icon.

**Protocol for ordering approvers:**

1) Department Approver(s) and / or Principal Investigator **must** precede any Secondary Approvers.
2) Secondary Approver(s) should be ordered in the following way:
   a. Operating Accounts
   b. Research Accounts

14) Depending upon which button at the bottom of the screen you click, you may go [Back to Selecting Approvers], [Save as Draft] or [Submit Requisition for Approval].

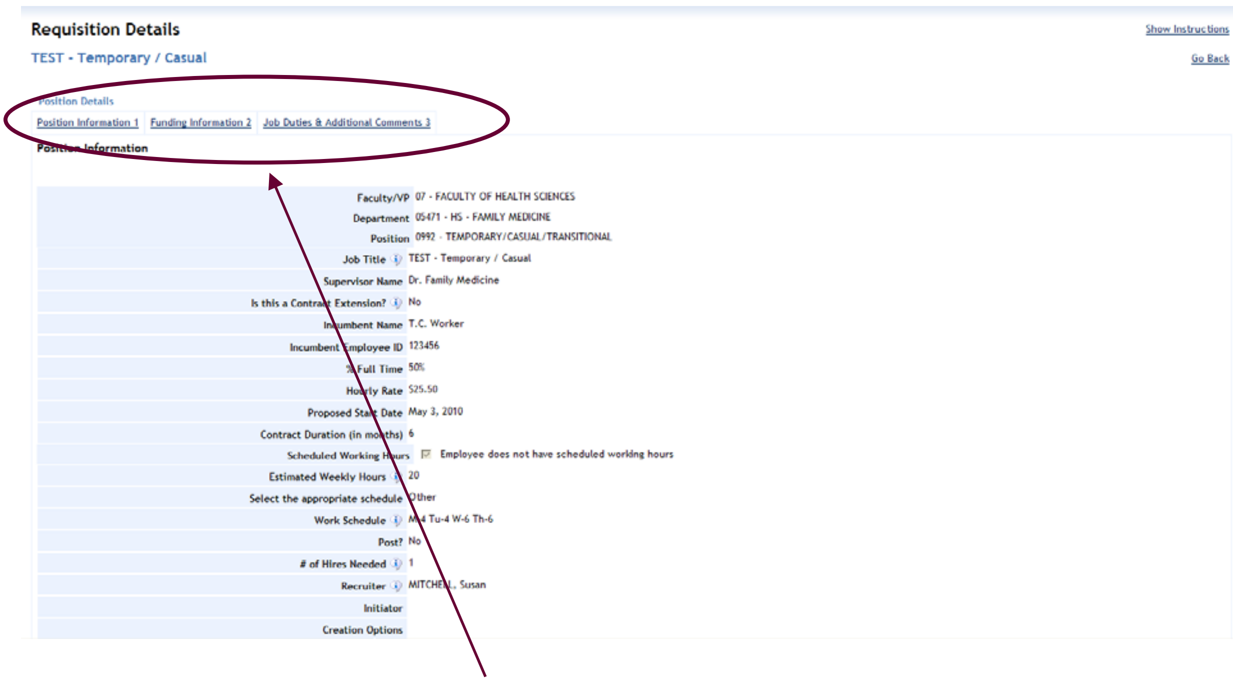
15) Clicking [Submit Requisition for Approval] brings you to the end of the Create Requisition process. You will then be brought automatically to your Manage Requisitions screen, which is also accessible through the MacTRAC left navigation menu.

## REVIEWING APPROVALS

You can review the list of approvers for a requisition, as well as any actions they have taken from the left-hand menu:

Requisitions > Manage Requisitions

1) Click on the hyperlinked job title to view the requisition details.



Requisition Details

TEST - Temporary / Casual

Show Instructions

Go Back

Position Details

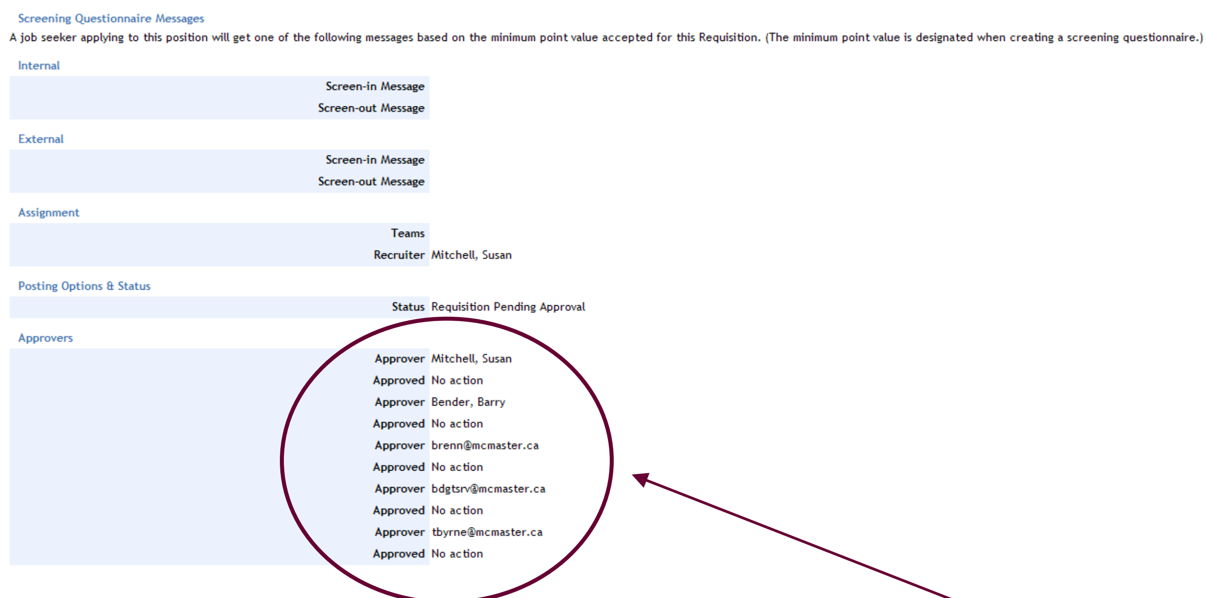
Position Information 1 | Funding Information 2 | Job Duties & Additional Comments 3

Position Information

| | |
|---|---|
| Faculty/VP | 07 - FACULTY OF HEALTH SCIENCES |
| Department | 05471 - HS - FAMILY MEDICINE |
| Position | 0992 - TEMPORARY/CASUAL/TRANSITIONAL |
| Job Title | TEST - Temporary / Casual |
| Supervisor Name | Dr. Family Medicine |
| Is this a Contract Extension? | No |
| Incumbent Name | T.C. Worker |
| Incumbent Employee ID | 123456 |
| % Full Time | 50% |
| Hourly Rate | $25.50 |
| Proposed Start Date | May 3, 2010 |
| Contract Duration (in months) | 6 |
| Scheduled Working Hours | Employee does not have scheduled working hours |
| Estimated Weekly Hours | 20 |
| Select the appropriate schedule | Other |
| Work Schedule | M-4 Tu-4 W-6 Th-6 |
| Post? | No |
| # of Hires Needed | 1 |
| Recruiter | MITCHELL, Susan |
| Initiator | |
| Creation Options | |

2) To view the entire requisition details click through the tabs.

3) At the bottom of each page, the same fields will appear, as below:



Screening Questionnaire Messages

A job seeker applying to this position will get one of the following messages based on the minimum point value accepted for this Requisition. (The minimum point value is designated when creating a screening questionnaire.)

Internal

| | |
|---|---|
| Screen-in Message | |
| Screen-out Message | |

External

| | |
|---|---|
| Screen-in Message | |
| Screen-out Message | |

Assignment

| | |
|---|---|
| Teams | |
| Recruiter | Mitchell, Susan |

Posting Options & Status

| | |
|---|---|
| Status | Requisition Pending Approval |

Approvers

| | |
|---|---|
| Approver | Mitchell, Susan |
| Approved | No action |
| Approver | Bender, Barry |
| Approved | No action |
| Approver | brenn@mcmaster.ca |
| Approved | No action |
| Approver | bdgtsrv@mcmaster.ca |
| Approved | No action |
| Approver | tbyrne@mcmaster.ca |
| Approved | No action |

4) The approvers in order and any action they have taken, i.e., “Approved”, “Declined” or “No action” will be listed here. You will also receive an email notification upon each approver’s action.