

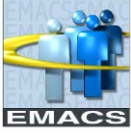


# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

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# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

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## **Outline:**

### **Request Certification List**

- Requestor
  1. Navigate to Certification List Request page
  2. Initiate Request
  3. System Generated Sequence Number
  4. Text Box
  5. Request Special Skills

### **Approval of Request for Certification List**

- Approver
  6. Approval Levels
  7. Navigate to Worklist
  8. Retrieve a Requested Certification List from Worklist
  9. Approve or Deny Certification List Request

### **Finalize Request Process in EMACS**

- Human Resources Processor
  10. Retrieve a Requested Certification List from Worklist
  11. Generate PR #
  12. Par Tracking
  13. Certification List Status



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role

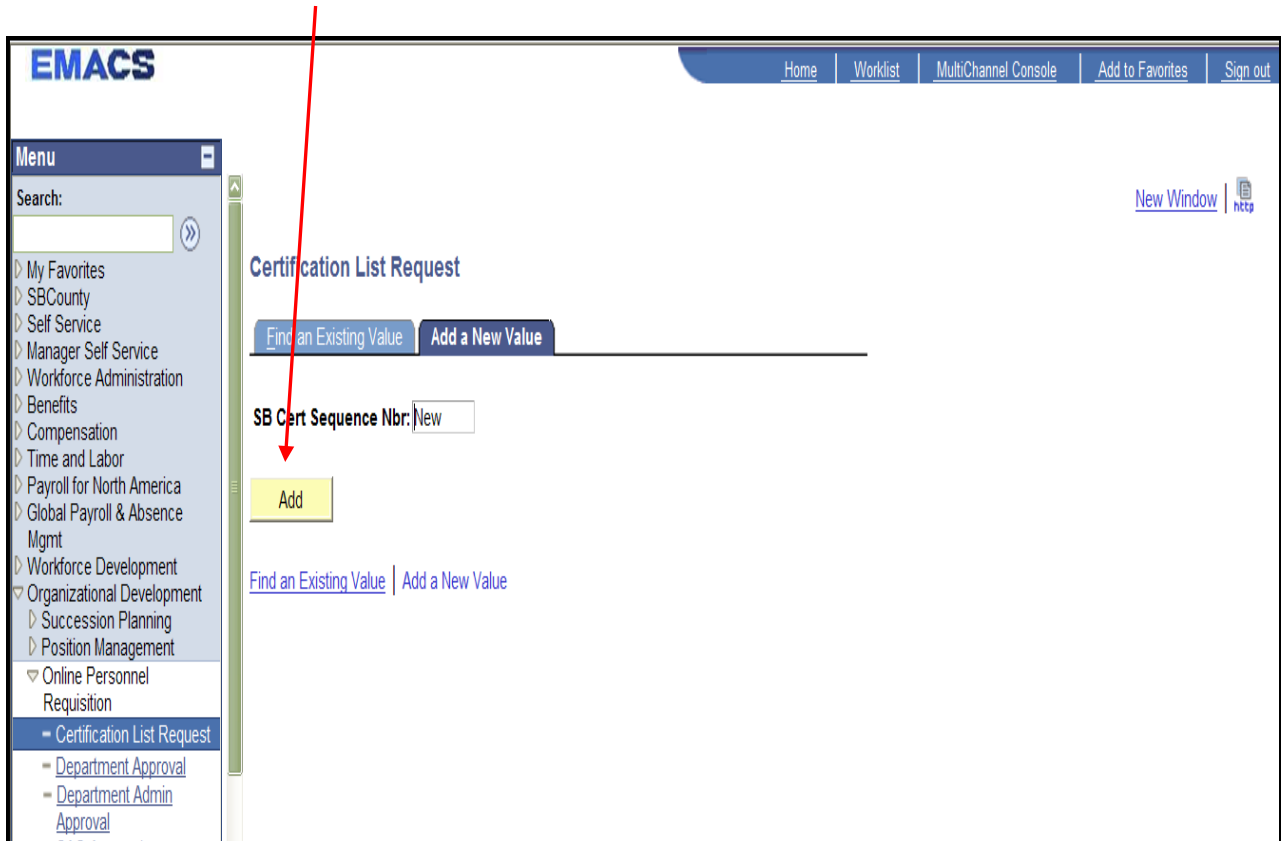
The Requestor is the originator of the Certification List request. A position number is required to request a Certification List. The following instructions show how to request and approve an Online Certification List.

### 1) Add a New Request

- A. From the main menu, navigate to the Certification List Request Page:

**Organizational Development > Online Personnel Requisition > Certification List Request**

- B. Click on the **Add** button.





# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role (continued)

### 2) Initiate Request for a Certification List

- A. Enter a position number in the position number field.
- B. Click on the **Save** button.

**Request** | **Skills**

Sequence Nbr: NEW      PR Number:

\*Position Number: 84101      Job Code:

\*Certification Type: New Hire

Department:

\*Requested Job Code:

Employee Type: Regular      Standard Hrs:      Bilingual: Not Bilngl

Location: San Bdno      Shift: Day Shift      Underfill:

Include Transfers

Dual Fill

Comments:

Requestor:      Approval Status:

Last Updt: 10/19/2010 4:50PM      Approvals:  Dept  Admin  Group  CAO

**Save**      **Add**      **Update/Display**

[Request](#) | [Skills](#)



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role (continued)

### 3) Sequence number and Default Data

After you click on **Save**, EMACS will automatically assign a sequence number. The sequence number will identify individual requests throughout the Certification Request process. In addition, position data entry fields will populate with default values as shown in the page below.

- A. If necessary, you can override the default values in the data entry fields. After overriding the data, click on the **Save** button to save the changes.

**EMACS** Home

**Request** Skills

**Sequence Nbr:** 24597 **PR Number:**

\***Position Number:** 00084101 **Job Code:** 16095 Human Resources Analyst I

\***Certification Type:** New Hire  ARMC

**Department:** 91101 ARMC Human Resources

\***Requested Job Code:** 16095 Human Resources Analyst I

**Employee Type:** Regular **Standard Hrs:** 40.00 **Bilingual:** Not Bilngl

**Location:** San Bdno  **Shift:** Day Shift  **Underfill:**

**Include Transfers**

**Dual Fill**

**Comments:**

**Requestor:** Ship,Connie 10/26/2010 9:43AM **Approval Status:** Pend Dept

**Last Updt:** Ship,Connie 10/26/2010 9:43AM **Approvals:**  Dept  Admin  Group  CAO



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role (continued)

### 4) Text Box

- A. If applicable, place a check mark in the **'Include Transfers'** and/or the **'Dual Fill'** check boxes by clicking on them. The text box titled **'Reason'** will open when the 'Dual Fill' box is checked. You may use the 'Reason' text box to provide an explanation regarding the requested dual fill position. The 'Comments' text box is also available for additional notes or comments.

The screenshot shows the EMACS web application interface. At the top left is the EMACS logo, and at the top right is a 'Home' link. Below the logo is a navigation bar with 'Request' and 'Skills' tabs. The main form contains the following fields:

- Sequence Nbr: 24597
- PR Number: [empty]
- \*Position Number: 00084101
- Job Code: 16095 Human Resources Analyst I
- \*Certification Type: New Hire (dropdown)
- ARMC
- Department: 91101 ARMC Human Resources
- \*Requested Job Code: 16095
- Human Resources Analyst I
- Employee Type: Regular
- Standard Hrs: 40.00
- Bilingual: Not Bilingual (dropdown)
- Location: San Bdno (dropdown)
- Shift: Day Shift (dropdown)
- Underfill: [empty] (dropdown)

A red box highlights the following section:

- Include Transfers
- Dual Fill  Reason: Note: This Reason text box will only pop up when the Dual Fill Box is Checked. (text box)
- Comments: Note: This Comments text box can be used to provide information pertaining to the Cert. request. (text box)

At the bottom of the form, there are fields for Requestor (Ship, Connie), Last Updt (Ship, Connie), and Approval Status (Pend Dept). There are also checkboxes for Dept, Admin, Group, and CAO. At the bottom left is a 'Save' button, and at the bottom right are 'Add' and 'Update/Display' buttons. The bottom left corner has a link for 'Request | Skills'.



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role (continued)

### 5) Request Special Skills

To build the Certification List, Human Resources will use the information the requestor enters on this page to develop a list of skills required for the requested position.

1. Click on the **Skills** tab to navigate to this page.

### Skills Page

**EMACS** Home

Request **Skills**

**Sequence Nbr:** 24597    **PR Number:**    **Certification Type:** New Hire

**Position Number:** 00084101    ARMC

**Department:** 91101    ARMC Human Resources

**Job Code:** 16095    Human Resources Analyst I

**Other Skills:**

**Typing WPM:**

**Special Skills** Find | View All    First 1 of 1 Last

[Request](#) | [Skills](#)




# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Requestor Role (continued)

### 5) Request Special Skills (Continued)

**Special Skills:** Enter the skills required for the position on this page.

- A. Use the **Other Skills** data entry field to list additional skills required.
- B. Use the **Typing WPM** data field to specify the required typing speed.
- C. In the **Special Skills** Box, **click** on the **Search** icon (magnifying glass) to display a list of skills. The Search Results box will appear with a predefined list of skills relevant to the position. Select a special skill by **clicking** it. To select an additional skill, **click** on the plus  sign to add a row. Only three Special Skills rows can be added.
- D. Click on the **Save** button.

**Note:** Now the request will be electronically routed to the Approver's Worklist.

The screenshot shows the EMACS system interface. At the top, there are tabs for 'Request' and 'Skills'. Below the tabs, the following information is displayed:

Sequence Nbr:	24597	PR Number:		Certification Type:	New Hire
Position Number:	00084101		ARMC		
Department:	91101		ARMC Human Resources		
Job Code:	16095		Human Resources Analyst I		

Other Skills:

Typing WPM:

**Special Skills** Find | View All First 1-2 of 2 Last

REC	Employment experience	+ -
CLS	Classification	+ -

Save Add





# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Approver Role

### 6) Approval Levels

The **Approver** is authorized to approve or deny an Online Personnel Requisition (PR). There are four levels of approval authorization, **Departmental**, **Administrative**, **Agency**, and **County Administrative Office (CAO)**. The department's Manager or HRO have predefined and authorized Approval levels for their department. Not all departments use all of the first three approval levels, but all departments must have a CAO approval level, which is the final approval level. Once the Online PR has been routed through each predefined approval level, the Online PR request will be electronically forwarded to Human Resource's Certification Worklist.

**Denial:** If the request is denied at any point in the approval process, the Online PR request will be routed (returned) to the Requestor's Worklist. The designated Requestor will receive an entry in their Worklist. The Approver cannot update the original request. An audit trail of activity pertaining to a request can be viewed from the Certification Request Status page (refer to the navigation and screen shots on page 19).

**Note:** Position # 84101 is used as an example in this document in the screen shots illustrating the process. Only three of the four approval levels were established by the department for this position.

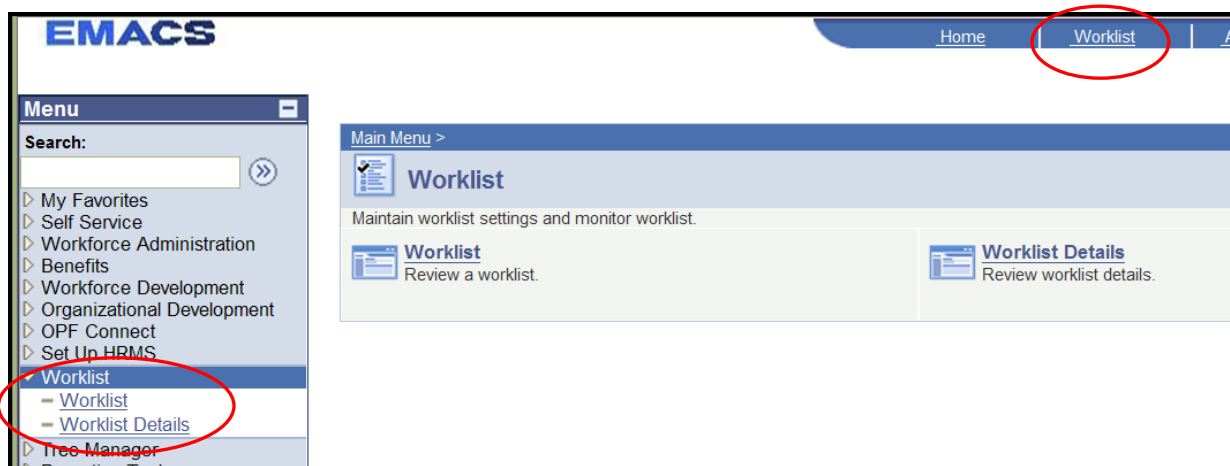
**Screen shots are shown for the following Approvers, Departmental, Agency, & CAO.**

### 7) Navigate to Worklist

The Worklist is where Online Certification PR requests are routed and stored. After the Certification List is requested, the request moves into the Worklist of a designated Approver and is removed from the Requestor's Worklist. After the Online PR Cert List is approved, the request will be removed from the Approver's Worklist and routed to the next approver. After the final CAO approval, the request will be routed to the Certification Human Resources Processor to finalize the Cert List request process in EMACS.

**Navigation:** Worklist > Worklist **or**

**A. Click** on the Link Located at the top of the EMACS page titled Worklist.





## County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

### Approver Role (continued)

#### 8) Retrieve the most current Certification Request in the Worklist

In the Worklist's **Link** column is a hyperlink which includes position number, department number, department name, job title, and sequence number.

- A. Click on the **Refresh** button located at the bottom of the page. The refresh button will bring up current Requests routed to the Worklist.
- B. Identify the Cert Request to be approved by locating its position and sequence numbers in the hyperlink.
- C. Click on the hyperlink of the position you've selected for approval. The link will take you to the Departmental Approval page. See next screen shot.

#### Department Approver's Worklist

EMACS Home | Worklist

Worklist for U0078: Boat, Sam

[Detail View](#) Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark
Ship, Connie	10/26/2010	Department Approval	Department Review	<input type="text"/>	<a href="#">00084101_91101_ARMC Human Resources_16095_Human Resources Analyst I_24597</a>	Mark



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Approver Role (continued)

### 9) Approve or Deny Certification List Request

The steps listed below apply to each of the designated Online PR Certification Approvers.

- A. **Click** on the **Request** and **Skills** tabs to review request details.
- B. **Click** on the **Approval tab**, then move your cursor to the Approval Action box.
- C. **Click** on the **drop-down list** and select an Approval Action (Approve or Deny).
- D. **Comment text box**: Comments are optional and may be helpful.
- E. **Click** on the **Save** button.

Upon the last (CAO) approval, the Online PR request will be routed to the HR-Certification processor's Worklist. The Cert List request will be automatically removed from the Approver's Worklist.

**Important:** If the Cert List request is denied, the request will be returned to the Requestor's Worklist.

## Department Approver

- Approve or Deny Certification List Request

The screenshot displays the EMACS system interface. On the left is a navigation menu with options like 'My Favorites', 'SBCounty', 'Self Service', and 'Worklist'. The main content area shows a request detail view with tabs for 'Request', 'Approval', and 'Skills'. The 'Approval' tab is active, showing fields for 'Sequence Nbr: 24597', 'Position Number: 00084101', 'Department: 91101', and 'Job Code: 18005'. The 'Approval Action' dropdown menu is set to 'Approve' and is circled in red. Below this is a 'Comment' text box. At the bottom, there are 'Save' and 'View Worklist' buttons, with the 'Save' button also circled in red. The status bar at the bottom indicates 'Last Updated: K1421 10/26/2010 9:55AM' and 'Requestor: K1421 10/26/2010 9:43AM'.



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Approver Role (continued)

### Approve or Deny Certification List Request

Agency Approver - Worklist

Worklist for D7624: Bus, Fred J.

Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link	Marked/Worked	Reassign
Boat, Sam	10/26/2010	Agency Approval	Agency Review		00084101_91101_ARMC Human Resources_16095_Human Resources Analyst I_24597		

### Agency Approval Action

- Approve or Deny Certification List Request.

Menu

Search:

- My Favorites
- SBCounty
- Self Service
- Workforce Administration
- Benefits
- Payroll for North America
- Workforce Development
- Organizational Development
- OPF Connect
- Set Up HRMS
- Worklist
  - Worklist
  - Worklist Details
- Tree Manager
- Reporting Tools
- SB Production Control
- Change My Password

Request Skills Approval

Sequence Nbr: 24597

Position Number: 00084101    New Hire    ARMC

Department: 91101    ARMC Human Resources

Job Code: 16095    Human Resources Analyst I

Approval Action:     Approval Status: Pend CAO

Comment:

Last Updated: U0078    10/26/2010 10:23AM    Requestor: K1421    10/26/2010 9:43AM

Save View Worklist Previous in Worklist Next in Worklist

[Request](#) | [Skills](#) | [Approval](#)



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Approver Role (continued)

### CAO Approver - Worklist

The screenshot shows the EMACS Worklist interface. At the top, there are tabs for 'Home' and 'Worklist'. Below the tabs, it says 'Worklist for A1417: Jet, Ann'. There is a 'Detail View' link and a 'Work List Filters' dropdown menu. A table with the following columns is displayed: 'From', 'Date From', 'Work Item', 'Worked By Activity', 'Priority', and 'Link'. The first row contains the following data: 'Bus, Fred J.', '10/26/2010', 'CAO Approval', 'CAO Review', a dropdown menu, and a link: '00084101\_91101\_ARMC Human Resources\_16095\_Human Resources Analyst I\_24597'. A red circle highlights the 'Work Item' and 'Worked By Activity' columns. To the right of the table is a 'Mark Worked' button.

### CAO Approval Action

- Approve or Deny Certification List Request.

The screenshot shows the EMACS Approval Action form. At the top, there are tabs for 'Request', 'Skill', and 'Approval'. The 'Approval' tab is selected. The form contains the following fields: 'Sequence Nbr: 24597', 'Position Number: 00084101', 'Department: 91101', 'Job Code: 16095', 'Approval Action: Approve', and 'Approval Status: Pend HR'. A red circle highlights the 'Approval Action' dropdown menu. Below these fields is a 'Comment' text area. At the bottom, there are fields for 'Last Updated: D7624 10/26/2010 10:41AM' and 'Requestor: K1421 10/26/2010 9:43AM'. At the very bottom, there are buttons for 'Save', 'View Worklist', 'Previous in Worklist', and 'Next in Worklist'. Below the buttons are links for 'Request | Skill | Approval'.

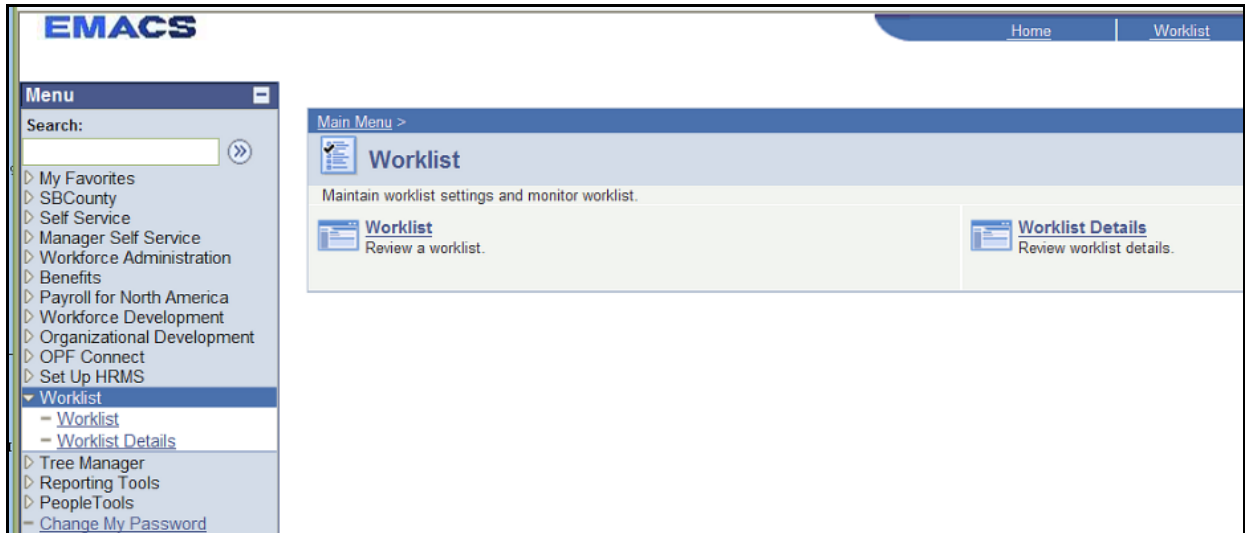


# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

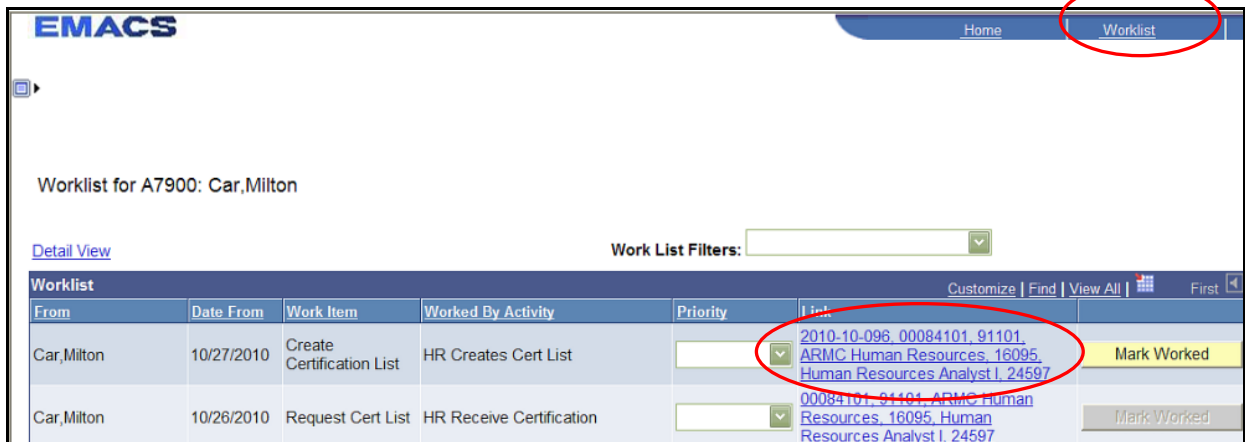
## Human Resources Processor

### 10) Retrieve a Requested Certification List from the Worklist.

#### A. Navigate to Worklist



#### B. Retrieve Certification List Request.





# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Human Resources Processor (continued)

### 11) Generate PR Number for PAR Tracking

Assign PAR Control Number	Approval Log	Skill	
Sequence Nbr:	24597	PR Number: <b>New</b>	Certification Type: New Hire
Position Number:	00084101	ARMC	
Department:	91101	ARMC Human Resources	
Budgeted Job Code:	18095	Human Resources Analyst I	
Requested Job Code:	18095	Human Resources Analyst I	
Employee Type:	Regular	Standard Hrs: 40.00	Bilingual: Not Bilingl
Location:	San Bdno	Shift: Day Shift	Underfill:
Copy of Applications <input checked="" type="checkbox"/>	Include Transfers <input checked="" type="checkbox"/>		
Dual Fill <input checked="" type="checkbox"/>	Reason:	Note: This Reason text box will only pop up when the Dual Fill Box is Checked.	
Comments:	Note: This Comments text box can be used to provide information pertaining to the Cert. request.		
Requestor Id:	K1421	10/26/2010 9:43AM	Approval Status: Approved
Last Updated Id:	A7900	10/27/2010 7:22AM	Approvals: <input checked="" type="checkbox"/> Dept <input type="checkbox"/> Admin <input checked="" type="checkbox"/> Group <input checked="" type="checkbox"/> CAO

PR Number Automatically Assigned

- Click **Save**

Assign PAR Control Number	Approval Log	Skill	
Sequence Nbr:	24597	PR Number: <b>2010-10-096</b>	Certification Type: New Hire
Position Number:	00084101	ARMC	
Department:	91101	ARMC Human Resources	
Budgeted Job Code:	18095	Human Resources Analyst I	
Requested Job Code:	18095	Human Resources Analyst I	
Employee Type:	Regular	Standard Hrs: 40.00	Bilingual: Not Bilingl
Location:	San Bdno	Shift: Day Shift	Underfill:
Copy of Applications <input checked="" type="checkbox"/>	Include Transfers <input checked="" type="checkbox"/>		
Dual Fill <input checked="" type="checkbox"/>	Reason:	Note: This Reason text box will only pop up when the Dual Fill Box is Checked.	
Comments:	Note: This Comments text box can be used to provide information pertaining to the Cert. request.		
Requestor Id:	K1421	10/26/2010 9:43AM	Approval Status: Approved
Last Updated Id:	A7900	10/27/2010 7:22AM	Approvals: <input checked="" type="checkbox"/> Dept <input type="checkbox"/> Admin <input checked="" type="checkbox"/> Group <input checked="" type="checkbox"/> CAO
<b>Save</b>	View Worklist	Previous in Worklist	Next in Worklist

[Assign PAR Control Number](#) | [Approval Log](#) | [Skill](#)



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## HR Processor and EMACS Operations

### 12) Par Tracking

**Navigation:** Organizational Development > Online Personnel

**PAR Tracking Page** – Accessed by the HR Processor and EMACS Operations.

The screenshot shows the EMACS PAR Tracking interface. On the left is a navigation menu with 'PAR Tracking' selected. The main area contains search fields for PAR Control Number, Job Code, Position Number, and Department. The 'Position Number' field is circled in red and contains the value '00084101'. Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A 'Search Results' table is displayed below, also circled in red, showing two results for the specified position number.

PAR Control Number	Job Code	Position Number	Department
<a href="#">2010-10-096</a>	<a href="#">16095</a>	<a href="#">00084101</a>	<a href="#">91101</a>
<a href="#">2008-01-349</a>	<a href="#">16095</a>	<a href="#">00084101</a>	<a href="#">91101</a>





# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Par Tracking (continued) - HR Processor and EMACS Operations

The fields on this page are updated by both the HR Processor and EMACS Operations team staff with data (Dates and General information) used to track the Certification List and the Incumbent.

- **Click** on the **Dates** Tab.

The screenshot shows the EMACS interface with the 'Dates' tab selected. The 'Control Number' is 2010-10-096, 'Status' is EM Apprvl, and 'Type' is Cert Reqd. The 'Job Code' is 16095, 'Position' is 00084101, and 'Department' is 91101. The 'Dates' section includes fields for Received Cert (10/27/2010), Emp Apprv Req, Received Trans, Certification, List Returned, Emplmnt Apprvd, Sent Recrtmnt, Sent EMACS, Sent CAO, and EMACS/Payroll. The 'Certification Dates' section has fields for \*Recertified and Returned. The bottom navigation bar includes Save, Return to Search, Previous in List, Next in List, Add, and Update/Display.

- **Click** on the **Referrals** Tab.

This PAR tracking page is updated by the **HR Processor**.

The screenshot shows the EMACS interface with the 'Referrals' tab selected. The 'Control Number' is 2010-10-096, 'Status' is EM Apprvl, and 'Type' is Cert Reqd. The 'Job Code' is 16095, 'Position' is 00084101, and 'Department' is 91101. The 'Referrals' section includes fields for HR Action, Referral Id, List, and Comments. The left sidebar shows a menu with 'PAR Tracking' selected. The bottom navigation bar includes Home, Worklist, and other navigation options.



# County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

## Par Tracking (continued) - EMACS Operations

- **Click** on the **General** tab.

This PAR tracking page is updated by the EMACS Operations Staff.

**EMACS** Home Worklist

**Menu**

Search: [ ] [ ]

My Favorites  
SBCounty  
Self Service  
Manager Self Service  
Workforce Administration  
Benefits  
Payroll for North America  
Workforce Development  
Organizational Development  
Position Management  
Online Personnel Requisition  
Agency Approval  
Certification Request Status  
HR Certification Acceptance  
HR Employment Approval  
PAR Tracking  
PAR Tracking - Department  
OPF Connect  
Set Up HRMS  
Worklist  
Tree Manager  
Reporting Tools  
PeopleTools  
Change My Password

**General** | Dates | Referrals | Certification List

Control Number: 2010-10-096 Status: EM Apprvl Type: Cert Reqd  
Job Code: 16095 Human Resources Analyst I Position: 00084101  
Department: 91101 ARMC Human Resources  
Action Type: Dual Fill Job Type: Regular  
Done: Not Complt Shift: Day Shift  
Area: San Bdno  
Employee Name: [ ] View Online Request Data  
Hired JobCode: [ ]  
Comment: Note: This Comments text box can be used to provide information pertaining to the Cert. request.  
Last Updated: 10/27/10 7:22AM Operator Id: A7900  
Save Return to Search Previous in List Next in List Add  
General | Dates | Referrals | Certification List



## County of San Bernardino Online Personnel Requisitions and Certification Lists Requestor and Approver Process

### Human Resources processor, Requestor and Approver

#### 13) Certification List Status

**Navigation:**

Organizational Development > Online Personnel Requisition > Certification List Request Status

- **Click** on the **Log** Tab.

[Home](#) | [Worklist](#) | [Add to Favorites](#)

[New Wir](#)

Request | Skills | Approval | Log

**Sequence Nbr:** 24597

**Position Number:** 00084101    New Hire                    ARMC

**Department:** 91101                                    ARMC Human Resources

**Job Code:** 16095                                    Human Resources Analyst I

Activity Log						
Event	Originator	Assigned to	Available Date/Time	Worked Date/Time	Days to Work	
1 Dept Approval	Ship,Connie	Motor,Sally	10/26/2010 9:43:09AM			
2 Dept Approval	Ship,Connie	Boat,Sam	10/26/2010 9:43:09AM			
3 Agency Approval	Boat,Sam	Bus,Fred J.	10/26/2010 10:23:57AM	10/26/2010 10:41:07.000000AM	0.0119213	
4 CAO Approval	Bus,Fred J.	Jet,Ann	10/26/2010 10:41:07AM	10/26/2010 10:49:34.000000AM	0.0058681	
5 Employment	Jet,Ann	Car,Milton	10/26/2010 10:49:34AM	10/26/2010 3:22:22.000000PM	0.1894444	
6 Approved	Car,Milton	Car,Milton	10/26/2010 3:22:22PM			
7 Create Certification List	Car,Milton	Car,Milton	10/27/2010 7:22:29AM			

**Last Updated:** A7900    10/27/2010 7:22AM    **Requestor:** K1421    10/26/2010 9:43AM

Return to Search | Previous in List | Next in List