



JDX Faculty Appointment Change Job Aid

Table of Contents

How to Access the JDXpert System:	1
JDXpert Faculty Appointment Change Overview:	1
Add Job in JDXpert to Initiate Faculty Appointment Change Workflow:.....	1
Choosing and Defining Approvers for Workflow Approval Route Stops:	3
Completing the Workflow Tabs:	5
Workflow Action Buttons:	12
Approving and Rejecting/Returning a Workflow:	13

How to Access the JDXpert System:

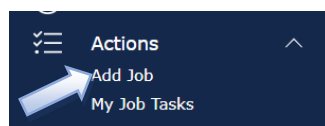
1. Open internet browser and go to: apps.uillinois.edu
2. Select [JDXpert](#) (found on the Human Resources card)
3. Log in to JDXpert using your net ID and password

JDXpert Faculty Appointment Change Overview:

- Transaction Type – Faculty Appointment Change Workflow—Create a Job Description
- Routing required – 4 Steps = Workflow Initiator, Unit HR Review and Sign-off, College Reviews Job Description, OAE review and Sign-off

Add Job in JDXpert to Initiate Faculty Appointment Change Workflow:

1. **From the Main Dashboard, on the left-hand side click on “Actions”**
 - a. Select “Add Job”



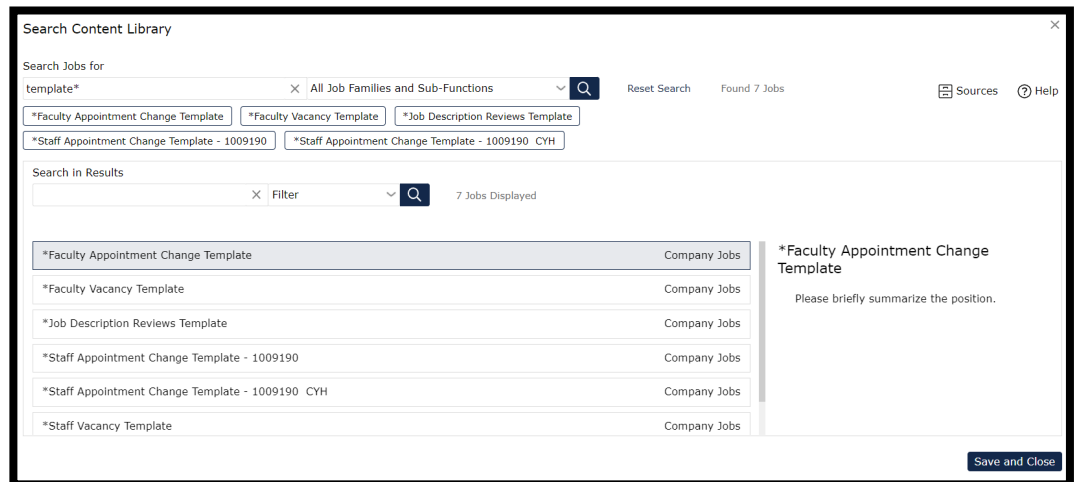
Last Modified: April 28, 2023

- b. Add Job – Choose a Template:
 - a. Always choose “Select Base Job”



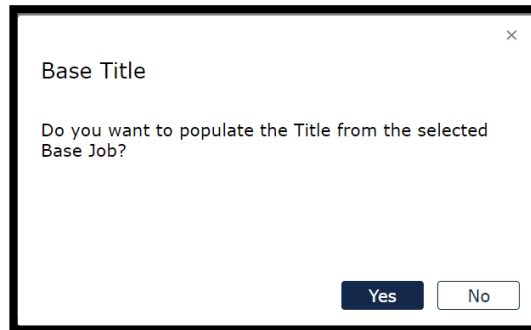
2. **Search** **Content Library**

- a. Enter a key job title word



- b. Select a Job Template from the list of Company Jobs (Job Descriptions created on campus and fully approved)
 - a. If no job is found based on your title search, type in ‘template’ and use “*Faculty Appointment Change Template”.
 - b. NOTE: Use “*Faculty Appointment Change Template” will be common until there are more faculty appointment change templates in the system. You will be able to select your own prior templates or templates saved by others on campus.
- c. Select “**Save and Close**”

3. **Base Title** – “Do you want to populate the Title from the selected Base Job?”
 - a. Select ‘NO’ – you will enter your job title in the next step

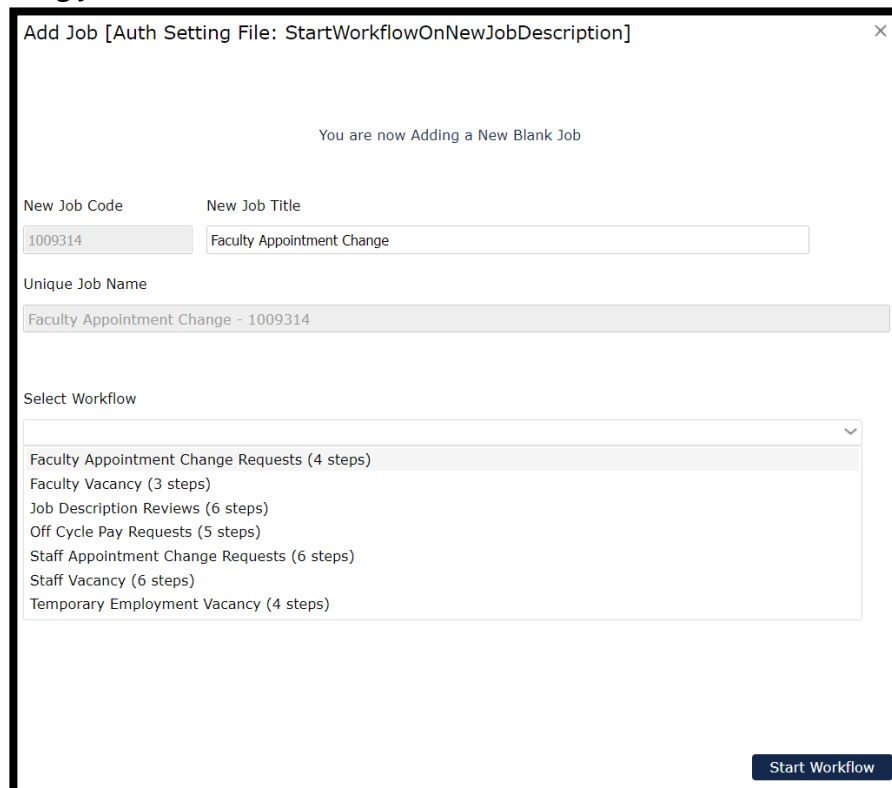


Base Title

Do you want to populate the Title from the selected Base Job?

Yes No

4. **Add Job** – Building your New Job



Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]

You are now Adding a New Blank Job

New Job Code: 1009314

New Job Title: Faculty Appointment Change

Unique Job Name: Faculty Appointment Change - 1009314

Select Workflow:

- Faculty Appointment Change Requests (4 steps)
- Faculty Vacancy (3 steps)
- Job Description Reviews (6 steps)
- Off Cycle Pay Requests (5 steps)
- Staff Appointment Change Requests (6 steps)
- Staff Vacancy (6 steps)
- Temporary Employment Vacancy (4 steps)

Start Workflow

a. Enter Your New Job Title



WARNING: This title will be used to name the job description and later to serve as the name of the job posting in Cornerstone.

- Select the “Faculty Appointment Change (4steps)” Workflow from the “Select Workflow” drop-down list.
- Click on “**Start Workflow**” in the bottom right-hand corner of the screen.

Choosing and Defining Approvers for Workflow Approval Route Stops:

1. You will see the 4 steps – you must select an Approver for each of the 4 Steps


- a. **Click on ‘+’ for Workflow Initiator**
 - i. Will auto populate the person logged in starting the workflow and will have edit rights to the vacancy request/job description
- b. **Click on ‘+’ for Unit HR review and Sign-off**
 - i. In ‘Search’, enter the Unit HR Reviewer’s net ID
 - ii. Click on the ‘Emplid’ you are searching for
 - iii. Click on ‘Add Participant’
- c. **Click on ‘+’ for College Reviews Job Description**
 - i. In ‘Search’, enter the College Reviewer’s net ID
 - ii. Click on the ‘Emplid’ you are searching for
 - iii. Click on ‘Add Participant’
- d. **OAE Review and Sign-off** - auto populates

2. Click on ‘Start Workflow’

The screenshot shows a pop-up window titled "Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]". Inside, it says "You are now Adding a New Blank Job". The form includes fields for "New Job Code" (1009314), "New Job Title" (Faculty Appointment Change TEST - JOB Aid), and "Unique Job Name" (Faculty Appointment Change TEST - JOB Aid - 1009314). A "Select Workflow" dropdown is set to "Faculty Appointment Change Requests (4 steps)". Below this is a table of participants:

Workflow Initiator	Unit HR review and Sign-off	College Reviews Job Description	OAE review
Unit Hr User10	Laura Pew	Sean Mahaffey	Oae Acces
+	+	+	

At the bottom right, there is a blue arrow pointing to a "Start Workflow" button.

- a. On the pop up, click on “” (Edit Pencil) to complete the vacancy request /job description.

Job Workflow Start Report

Job Revision Workflow(s) Active Participants: Unit Hr User10 (User10@noemail.com)

Action	Job	Details
	Faculty Appointment Change TEST - JOB Aid - 1009314	Revision was started.

Generated Emails

Action	Recipient	Details
	Unit Hr User10 (User10@noemail.com)	Email Sent; Primary Step (#1) approver

- b. After you click on the Edit Pencil, you will be brought into the workflow on the **Job Information** Tab.
- c. At the top center of the page, the “Edit” **toggle should be ON**, if not, slide the toggle to ON.

Save and Close Discard Draft Workflows

This Job is in Wor

Faculty Appointment Change TEST - JOB Aid ☒ Edit

- d. **Please Note:** Most of the information auto populates into the workflow from the Base Job/Template you selected

Completing the Workflow Tabs:

1. Complete the Job Information Tab

Edit Revision Copy of Job Description 'Faculty Appointment Change TEST - JOB Aid - 1009314' [Code: 1009314]

Save and Close Discard Draft Workflows

This Job is in Workflow: Action Required

Faculty Appointment Change TEST - JOB Aid ☒ Edit

Job Information:

System Job Description Name: Faculty Appointment Change TEST - JOB Aid - 1009314

Title: Faculty Appointment Change TEST - JOB Aid

Classification Title:

Job Location or Region: Urbana-Champaign - 133

Job Description Reason:

Appointment Type:

Position Number:

Position Class Code:

Employee Group:



Employee Class:

COA:

Organization Code:

Previous Next Save

- a. **Job Location or Region** – auto populates - defaults to ‘Urbana-Champaign,’ can be changed by using a value from the drop-down list

- b. **Job Description Reason:** auto populates from the base job.
- c. **Appointment Type:** select from the drop down if you know it, if not, leave blank
- d. **Position Number** – will be assigned by IHR if unknown or for a new position
- e. **Position Class Code:**
 - i. Select from the list  if you know it, if not, leave blank and IHR will complete this field.
 - ii. Select a title from the list or enter a search string to find values.
 - iii. Click on “Select and Close”
- f. **Employee Group** – select from drop down if you know it, if not, leave blank
- g. **Employee Class** – select from drop down if you know it, if not, leave blank
- h. **COA** – defaults to ‘1 – Urbana’; should only be changed if this is a ‘System Office’ job
- i. **Organization Code** – can be changed using the 
- j. **Organization Name** – auto populates based on Organization Code
- k. **College/Administrative Unit** – auto populates based on Organization Code
- l. **Department Display Name** – auto populates from Base Job, can be changed by keying in name you wish to have displayed. This will be used later for the job posting in Cornerstone.
- m. **FTE** – enter a value from 0.0 – 1.0
- n. **Shift and Work Schedule** – only complete if relevant to the position (e.g. Shift: Days; Work Schedule: M-F 8-4:30)
- o. **Ability to Work Remotely** – this is for reporting and informational purposes and does not impact the job posting or ability for position to work remotely (or not)
- p. **Flex Schedule** – select appropriate radial button
- q. **Comments** – used to convey information to IHR or other downstream reviewers. If pursuing a multi-level search, please enter the job code and title of the connected workflow(s)
- r. **Is the position Security Sensitive** – select appropriate radial button
- s. **Is this a Protection of Minors position?** – select appropriate radial button

- t. **Purchasing Authority of \$5,000 or more?** – select appropriate radial button
- u. **Supervisory Authority of 20 or more?** – select appropriate radial button
- v. **Organizational Relationship** – free text field
- w. Click **'Save'** to save information entered
- x. Click **'Next'** to move to **'Proposed Appointee'** Tab

2. Complete the Proposed Appointee Tab

Edit Revision Copy of Job Description 'Faculty Appointment Change TEST - JOB Aid - 1009314' [Code: 1009314]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (8)

The Job is in Workflow: Action Required

Job Information

Proposed Appointee

Off-Cycle Pay Changes

Job Summary

Duties & Responsibilities

Qualifications

Physical Demands

Approvals and Comments

Proposed Appointee:

Present Classification Code: [Dropdown]

Employee UIN: [Text]

Employee Name: [Text]

Employee Current Title: [Text]

Current Salary: [Text]

Supervisor Name: [Text]

Who should IHR contact with questions?: [Text]

Requestor's Email Address: [Text]

Requesting approval for: [Dropdown]

Does this position represent a new role for the proposed appointee? ☐ Yes ☐ No

Is there a significant change in job duties or responsibilities for the proposed appointee? ☐ Yes ☐ No

Previous Next Save

- a. **Present Classification Code:**
 - i. Select from the list [Dropdown] if you know it, if not, leave blank and IHR will complete this field.
 - ii. Select a title from the list or enter a search string to find values.
 - iii. Click on “Select and Close”
- b. **Employee UIN:** Enter UIN of the person you wish to appoint
- c. **Employee Name:** Enter the name of the person you wish to appoint
- d. **Employee Current Title:** Enter the person’s Current Title
- e. **Current Salary:** Enter the person’s Current Salary
- f. **Supervisor Name:** Enter name
- g. **Who should IHR contact with questions?** – free form text; enter contact name and contact information
- h. **Requestor’s Email Address** - Enter email address
- i. **Requesting approval for** - Select from the drop-down

- j. **Does the position represent a new role for the proposed appointee?** – Select appropriate radio button
- k. **Is there a significant change in job duties or responsibilities for the proposed appointee?** – Select appropriate radio button
- l. **Is the unit going through a reorganization?** – Select appropriate radio button
- m. **Will the appointment change create a position vacancy?** – Select appropriate radio button
- n. **If yes, will the vacancy be filled through a search?** – Select appropriate radio button
- o. **Was the proposed appointee hired through a search at any point in their employment at Illinois?** – Select appropriate radio button
- p. **Please indicate date of last salary increase** – select date
- q. **Please indicate amount of last salary increase** – free form text
- r. **Are you requesting a mid-year or off cycle salary change as part of this request?** – Select appropriate radio button (If yes, please complete the Off-Cycle Pay Changes tab)
- s. **Justification:** free form text; enter justification for request
- t. Click **'Save'** to save information entered
- u. Click **'Previous'** to move back to **'Job Information'** Tab if you wish
- v. Click **'Next'** to move to **'Off-Cycle Pay Changes'** Tab

3. **Complete the Off -Cycle Pay Change Tab (if needed):**

Note: only complete this tab is requesting a pay increase as part of the appointment change

- a. **Employee Name** – Enter the employee’s name.
- b. **UIN** – Enter the employee’s UIN.
- c. **Position Number** – enter the Position Number.
- d. **Position Title** – enter the Position Title.
- e. **Requestor** – enter the requestor’s name.
- f. **Type of Increase** – select from the drop-down list.
- g. **Current Salary** – enter the employee’s current salary
- h. **Date of Last Salary Increase** – select date
- i. **Proposed Salary or Increment Amount** – enter amount of increase
- j. **Proposed Service Basis** – select from drop-down list
- k. **Percentage of Increase** – enter percentage of increase
- l. **Proposed Effective Date** – select date
- m. **Proposed End Date (if temporary)** – select date
- n. **Justification** – free form text entry
- o. **Approvals** – (IHR Use Only)
 - i. Reserved for IHR use only.
- p. Click **‘Save’** to save information entered
- q. Click **‘Previous’** to move back to **‘Proposed Appointee’** Tab if you wish

- r. Click **'Next'** to move to **'Job Summary'** Tab

4. Complete the Job Summary Tab

- a. **Primary Position Function/Summary** – This will auto populate from the Base Job selected.
- b. This is a free-text field of your job’s primary function, or you can use the **Search Library** function.
 - i. Click **“Search Library”**
 - ii. Use the search function at the top of the page to search for keywords related to Job Title or Job contents.
 - iii. Select a Job from the list. The Primary Position Function/Summary will appear on the right-hand side of the screen
 - iv. Select ‘Replace Text’ or ‘Add to Existing Text’ in your job
- c. **Click ‘Save’** to save the information entered
- d. **Click ‘Previous’** to move back to the **‘Off-Cycle Pay Changes’** Tab if you wish
- e. **Click on ‘Next’** to move to the **‘Duties & Responsibilities’** Tab

5. Complete the Qualifications Tab:

- a. **Minimum Qualifications** – free form entry. Will auto populate from the Base Job selected. Required to enter relevant qualifications in this field
- b. **Specialty Factors** – free form entry. Will auto populate from the Base Job selected. Optional field can be left blank if no special factors are desired.
- c. **Preferred Qualifications** – free form entry. Will auto populate from the Base Job selected. Optional field can be left blank if no special factors are desired.
- d. **Knowledge, Skills, and Abilities:**
 - i. **Click on ‘Add’** in the top left or **‘Add New Row’** in the bottom left to add a knowledge, skill, or ability
 - ii. **Click on ‘Global Search’** to find knowledge, skills, and abilities in the Search Library
 - a. Search and select from the list
 - b. Click on ‘Add to Job’ to add desired KSA to the list for this job description
- e. **Click on ‘Manage Rows’** and select from the drop down the action you want to take (for example, move rows up or down, insert row above or below, etc)
- f. **Click on ‘Save’** to save information entered
- g. **Click on ‘Previous’** to move back to the **‘Duties/Responsibilities’** Tab if you wish
- h. **Click on ‘Next’** to move to **‘Physical Demands’** Tab

6. Review the Approval and Comments Tab

Edit Revision Copy of Job Description "Faculty Appointment Change TEST - JOB Aid - 1009314" [Code: 1009314]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (9)

This Job is in Workflow: Action Required

Faculty Appointment Change TEST - JOB Aid Edit

WORKFLOW APPROVALS

Approvals

Step Name	Step Approver	Approval Date	Step Status
1. Workflow Initiator (Active)	Unit Hr User10	[N/A]	Not Started
2. Unit HR review and Sign-off	Laura Pew	[N/A]	Not Started
3. College Reviews Job Description	Sean Mahaffey	[N/A]	Not Started
4. OAE review and Sign-off	Oae Access And Equity	[N/A]	Not Started

Reviewer Comments

Participant	Date/Time	Comment
Unit Hr User10	6/15/2022 2:10:00 PM	This appointment change needs to be expedited.

Previous Next Save

- The four approval steps (Approval Date and Step Status) will be updated as actions are taken.
- Reviewer Comments:** All comments by any approver at any route stop are available to be viewed on this tab.
- Click on 'Save'** to save information entered.
 - If, when you click on 'Save', you get a list of errors, you may choose to "Continue Editing" to return to the Workflow and update the missing information or 'Close Form with Errors'.
- Click on 'Previous'** to move back to the 'Physical Demands' Tab if you wish.

Workflow Action Buttons:

1. Workflow Action Buttons

Spell check Preview Pane Split Screen Form Errors


This Job is in Workflow: Action Required

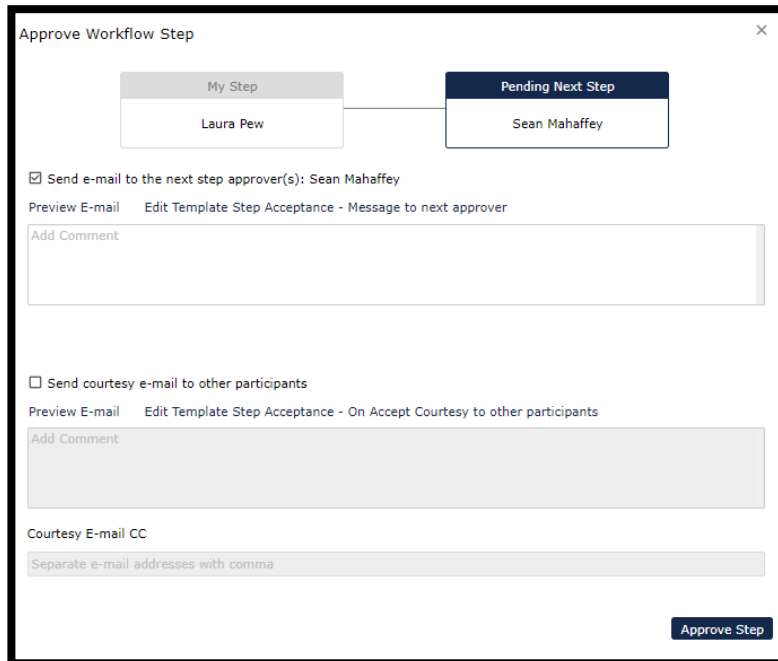
- You can review **Form Errors** by clicking on 'Form Errors' on the top left on the screen. These indicate where you have information missing within the Workflow.
 - Once you have corrected any errors, click on 'Save' and you will get a message: 'Saved OK' Job Description Saved. Click on 'OK'

- ii. To close if you are not making any changes, click Form Errors again or the X in the top right corner.
- b. From the **'Preview Pane'** you can download the job description to Word, PDF Format, view it in a popup HTML window or share with others (see icons in Preview Pane, top middle).
 - i. To close, click Preview Pane again or the X in the top right corner.
- c. The **Split Screen** option is available to review your job description with another job description in the Job Library.
 - i. Search for a job using the Search function. Select the job you wish to compare and click **"Select and Close"**.
 - ii. This will show you a split screen of both workflows to view simultaneously.
 - iii. To close, click Split Screen again or the X in the top right corner.
- d. Click on **Discard Draft** to delete the workflow if no longer needed.
- e. Click on **Workflows** and then **Workflow Details** to review the approval steps and add or replace a participant with the same role in any step. See the Job Training Modules for more information
- f. Select **Compare Jobs** to compare your job with another job in the Job Library that has already been approved.
 - i. Primary Job: The workflow you are currently in and working on.
 - ii. Secondary Job: Select a job to compare your workflow to.
 - iii. Set 'toggle button to 'Only selections with changes to compare your version and previous versions, either in a 'Merged Changes' format or 'Side-By-Side'.
 - iv. To close, click on the X in the top right corner.
- g. Click **Show the Workflow Status** to see the approval route stops and add or replace a participant with the same role in any step. See the Job Training Modules for more information
- h. Click **Show All Comments** to see all comments by any approver at any route stop are available to be viewed on this tab.

Approving and Rejecting/Returning a Workflow:

1. Approving a Workflow

- a. To approve your workflow step, click on the green ‘thumbs up’  icon in the top green Actions column.
- b. A Workflow Approval Step screen will appear where you can see yourself in the “My Step” box and the next approver in the “Pending Next Step” box.



Approve Workflow Step

My Step
Laura Pew

Pending Next Step
Sean Mahaffey

☒ Send e-mail to the next step approver(s): Sean Mahaffey
Preview E-mail Edit Template Step Acceptance - Message to next approver

Add Comment

☐ Send courtesy e-mail to other participants
Preview E-mail Edit Template Step Acceptance - On Accept Courtesy to other participants

Add Comment


Courtesy E-mail CC
Separate e-mail addresses with comma

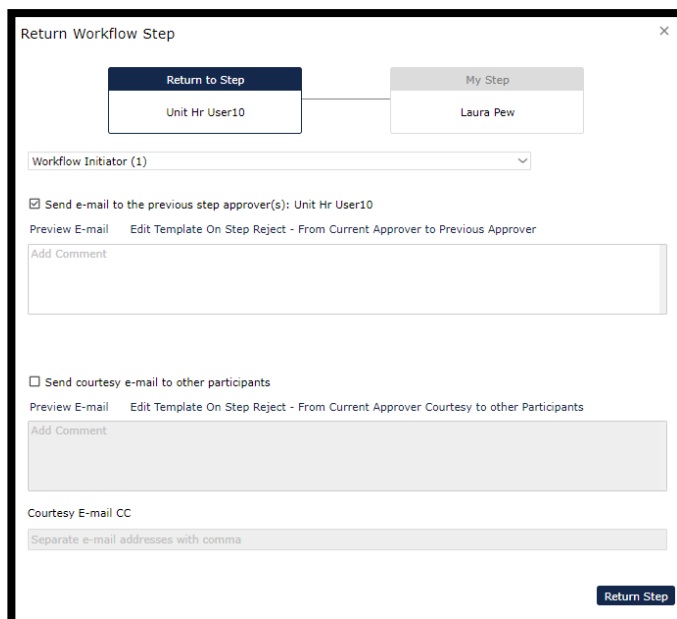
Approve Step

- c. **Send e-mail to the next step approver(s):** is automatically checked to send an email to the next approver in the routing queue.
 - i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.
 - ii. Click on Preview Email to view the email.
- d. **Send courtesy e-mail to other participants:** will not be automatically checked but you can check this box to send an email to all approvers at every route stop to notify them you have approved the workflow.
 - i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.
 - ii. Click on Preview Email to view the email.

- e. **Courtesy Email CC:** You can add courtesy email participants, separated by a comma, here to be copied on the emails if they are not listed in the approval queue but need to be notified.
- f. **Click ‘Approve Step’.** System will generate email to next level approver. Click ‘OK’ to close the wizard.
 - i. Under Tasks on the main homepage, the approvers in routing queue will have the workflow for review.
 - ii. Once all approvers have approved the workflow, the job description will be reviewed and approved at the Classification stops and an email will be sent back to the Workflow Initiator indicating the workflow has been fully approved.

2. Rejecting/Returning a Workflow

- a. Please Note: The Workflow Initiator will not have the option to reject/return the workflow as they are the one initiating the workflow and can use the Discard Draft if it’s no longer needed.
- b. To reject/return your workflow step, click on the green ‘thumbs down’  icon in the top green Actions column.
- c. A Return Workflow Step screen will appear where you can see yourself in the “My Step” box and the person you are returning the workflow to in the “Return to Step” box.



The screenshot shows a 'Return Workflow Step' dialog box. At the top, there are two boxes: 'Return to Step' (containing 'Unit Hr User10') and 'My Step' (containing 'Laura Pew'). Below these is a dropdown menu for 'Workflow Initiator (1)'. There are two main sections for sending emails. The first section is titled 'Send e-mail to the previous step approver(s): Unit Hr User10' and includes a checkbox that is checked, a 'Preview E-mail' link, and an 'Add Comment' text area. The second section is titled 'Send courtesy e-mail to other participants' and includes an unchecked checkbox, a 'Preview E-mail' link, and another 'Add Comment' text area. At the bottom, there is a 'Courtesy E-mail CC' section with a text input field for 'Separate e-mail addresses with comma'. A 'Return Step' button is located in the bottom right corner.

- d. In the dropdown list, you can select which approver you wish to send the workflow back to. Please Note: If you do not make a selection, it will default to the Workflow Initiator and every approver at every route stop will have to re-approve the workflow.
- e. **Send e-mail to the previous step approver(s):** is automatically checked to send an email to the person you have selected to reject the workflow to.
 - i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.
 - ii. Click on Preview Email to view the email.
- f. **Send courtesy e-mail to other participants:** will not be automatically checked but you can check this box to send an email to all approvers at every route stop to notify them you have rejected/returned the workflow.
 - i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.
 - ii. Click on Preview Email to view the email.
- g. **Courtesy Email CC:** You can add courtesy email participants, separated by a comma, here to be copied on the emails if they are not listed in the approval queue but need to be notified.
- h. **Click 'Return Step'.** System will generate email to the person you have selected to return the workflow to. Click 'OK' to close the wizard.
 - i. Under Tasks on the main homepage, the approvers in routing queue will have the workflow for review.
 - ii. Once all approvers have approved the workflow, the job description will be reviewed and approved at the Classification stops and an email will be sent back to the Workflow Initiator indicating the workflow has been fully approved.

Questions

- If you have any questions, please contact ihr-hrais@illinois.edu