



JDX Staff Appointment Change Job Aid

Table of Contents

How to Access the JDXpert System:	1
JDXpert Staff Appointment Change Overview:	1
Add Job in JDXpert to Initiate Staff Appointment Change Workflow:	1
Choosing and Defining Approvers for Workflow Approval Route Stops:	3
Completing the Workflow Tabs:	5
Workflow Action Buttons:	15
Approving and Rejecting/Returning a Workflow:	16

How to Access the JDXpert System:

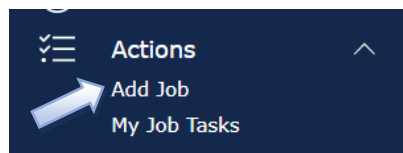
1. Open internet browser and go to: apps.uillinois.edu
2. Select [JDXpert](#) (found on the Human Resources card)
3. Log in to JDXpert using your net ID and password

JDXpert Staff Appointment Change Overview:

- Transaction Type – Staff Appointment Change Workflow—Create a Job Description
- Routing required – 6 Steps = Workflow Initiator, Unit HR Review and Sign-off, Hiring Manager Review, College Reviews Job Description, IHR Class Analyst Review and Sign-Off, IHR Classification Review and Sign-off

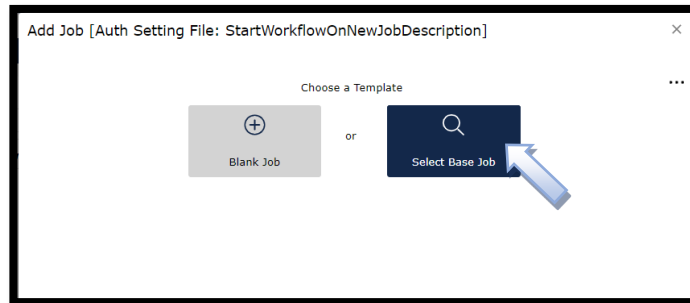
Add Job in JDXpert to Initiate Staff Appointment Change Workflow:

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



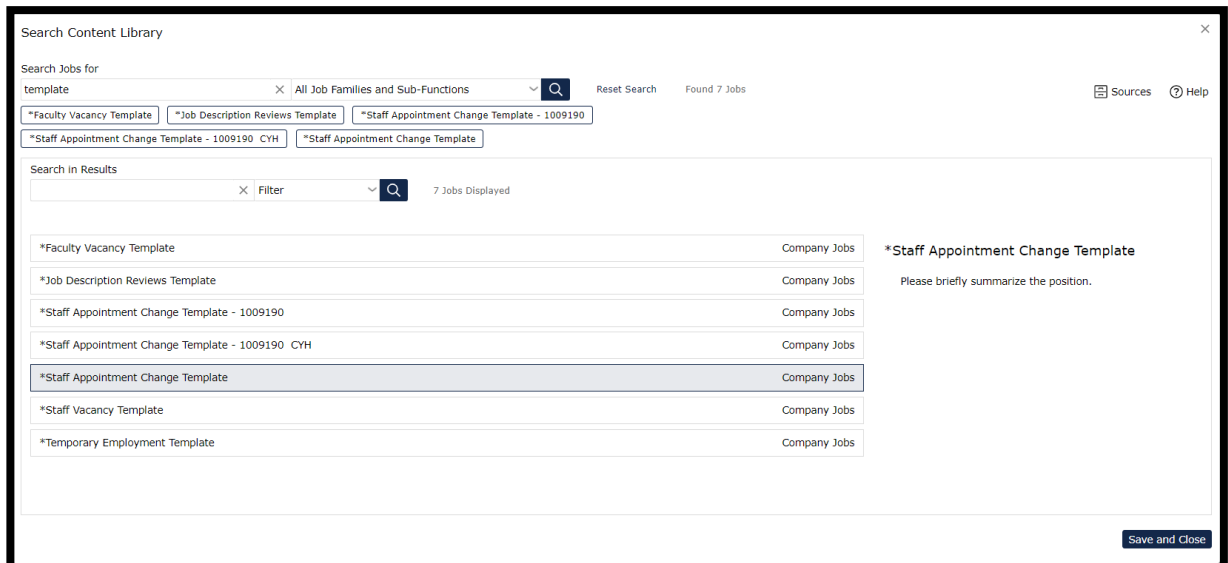
Last Modified: April 28, 2023

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



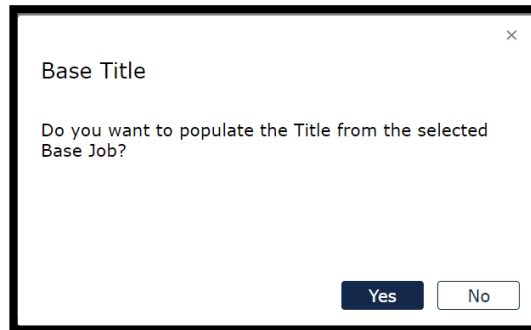
2. Search Content Library

- 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 title search, type in ‘template’ and use “*Staff Appointment Change Template”
 - b. NOTE: Use “*Staff Appointment Change Template” will be common until there are more staff 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

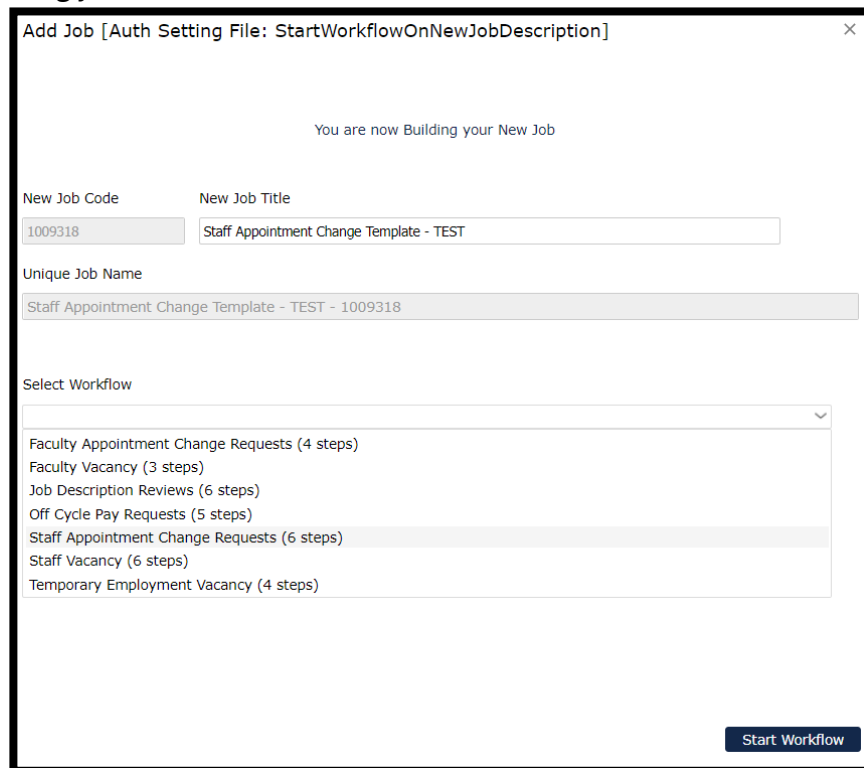


Base Title

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 Building your New Job

New Job Code: 1009318

New Job Title: Staff Appointment Change Template - TEST

Unique Job Name: Staff Appointment Change Template - TEST - 1009318

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 “Staff Appointment Change Requests (6 steps)” 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 Steps:

- You will see the 6 steps – you must select an Approver for each of the 6 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 Hiring Manager Review (Supervisor)**
 - i. In ‘Search’, enter the Hiring Manager Reviewer’s net ID
 - ii. Click on the ‘Emplid’ you are searching for
 - iii. Click on ‘Add Participant’
- d. **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’
- e. **IHR Class Analyst Review** – auto populates (set by IHR)
- f. **IHR Classification Review and Sign-Off** – auto populates (set by IHR)

2. Click on ‘Start Workflow’

Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]

You are now Building your New Job

New Job Code: 1009318

New Job Title: Staff Appointment Change Template - TEST

Unique Job Name: Staff Appointment Change Template - TEST - 1009318

Select Workflow: Staff Appointment Change Requests (6 steps)


Workflow Initiator	Unit HR Review Approval	Hiring Manager Review	College Reviewer
Unit Hr User10	Unit Hr User10	Laura Pew	
+	+	+	

Start Workflow


- 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
	Staff Appointment Change Template - TEST - 1009318	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 ▾



Staff Appointment Change Template - TEST ☒ 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 'Staff Appointment Change Template - TEST - 1009318' [Code: 1009318]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (6)

This Job is in Workflow: Action Required

Staff Appointment Change Template - TEST Edit

Job Information:

System Job Description Name: Staff Appointment Change Template - TEST - 1009318

Title: Staff Appointment Change Template - TEST

Classification Title: [Select]

Job Location or Region: Urbana-Champaign - 133

Job Description Reason: Appointment Change

Appointment Type: [Select]

Position Number: [Text]

Position Class Code: [Select]

Employee Group: [Select]

Employee Class: C - Civil Service Web/Dpt Tm EntryCH - CS 80Hr/pay N/E NonBen Elig

COA: 1 - Urbana


Organization Code: [Select]

Organization Name: [Text]

College/Administrative Unit: ZZ-Control - Organizations1

Previous Next Save

- a. **Classification Title:**
 - i. select from the list [Select] 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. **Job Location or Region** – auto populates - defaults to ‘Urbana-Champaign, can be changed by using a value from the drop-down list
- c. **Job Description Reason:** auto populates from the base job.
- d. **Appointment Type:** select from the drop down if you know it, if not, leave blank
- e. **Position Number** – will be assigned by IHR if unknown or for a new position
- f. **Position Class Code:**
 - i. select from the list [Select] if you know it, if not, leave blank and IHR will complete this field. This would be the pclass to which you believe this job will be promoted.
 - ii. Select a title from the list or enter a search string to find values.
 - iii. Click on “Select and Close”
- g. **Employee Group** – select from drop down if you know it, if not, leave blank
- h. **Employee Class** – select from drop down if you know it, if not, leave blank
- i. **COA** – defaults to ‘1 – Urbana’; should only be changed if this is a ‘System Office’ job

- j. **Organization Code** – can be changed using the 
- k. **Organization Name** – auto populates based on Organization Code
- l. **College/Administrative Unit** – auto populates based on Organization Code
- m. **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.
- n. **FTE** – enter a value from 0.0 – 1.0
- o. **Shift and Work Schedule** – only complete if relevant to the position (e.g. Shift: Days; Work Schedule: M-F 8-4:30)
- p. **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)
- q. **Flex Schedule** – select appropriate radial button
- r. Proposed Start Date – select from the drop down
- s. **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)
- t. **Is the position Security Sensitive** – select appropriate radial button
- u. **Is this a Protection of Minors position?** – select appropriate radial button
- v. **Purchasing Authority of \$5,000 or more?** – select appropriate radial button
- w. **Supervisory Authority of 20 or more?** – select appropriate radial button
- x. **Organizational Relationship Attachment:** - upload organizational chart
- y. Click 'Save' to save information entered so far; Click 'Next' to move to Proposed Appointee Tab

2. Complete the Proposed Appointee Tab

Edit Revision Copy of Job Description 'Staff Appointment Change Template - TEST - 1009318' [Code: 1009318]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (6)

This Job is in Workflow: Action Required

Staff Appointment Change Template - TEST Edit

Job Information

Proposed Appointee

Off-Cycle Pay Changes

Job Summary

Duties & Responsibilities

Qualifications

Physical Demands

Approvals and Comments

Proposed Appointee:

Present Classification Code:

Employee UIN:

Employee Name:

Employee Current Title:

Current Salary:

Supervisor Name:

Who should IHR contact with questions?

Requestor's Email Address:

Requesting approval for:

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

Is the unit going through a reorganization? ☐ Yes ☐ No

Will the appointment change create a position ☐ Yes ☐ No

Previous Next Save

a. **Present Classification Code:**

- i. Select from the list if you know it, if not, leave blank and IHR will complete this field. This is the classification the employee currently sits in.
- 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 Changes Tab

The screenshot shows the 'Off-Cycle Pay Changes' tab within a workflow titled 'Staff Appointment Change Test'. The tab is active, and the 'Edit' toggle is turned on. The form contains the following fields:

- Type of Increase:** A dropdown menu.
- Salary Information:** A section header.
- Current Salary:** A text input field with the value '0'.
- Date of Last Salary Increase:** A date picker showing '6/15/2022'.
- Proposed Salary or Increment Amount:** A text input field with the value '0'.
- Proposed Service Basis:** A dropdown menu.
- Percentage of Increase:** A text input field.
- Proposed Effective Date:** A date picker showing '4/4/2022'.
- Proposed End Date (if temporary):** A date picker.
- Justification:** A large text area for entering justification.

At the bottom right, there are buttons for 'Previous', 'Next', and 'Save'.

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

- a. **Current Salary** – enter the employee's current salary
- b. **Date of Last Salary Increase** – select date
- c. **Proposed Salary or Increment Amount** – enter amount of increase

- d. **Proposed Service Basis** – select from drop-down list
- e. **Percentage of Increase** – enter percentage of increase
- f. **Proposed Effective Date** – select date
- g. **Proposed End Date (if temporary)** – select date
- h. **Justification** – free form text entry
- i. **Approvals** – (IHR Use Only)
 - i. Reserved for IHR use only.
- j. Click **‘Save’** to save information entered
- k. Click **‘Previous’** to move back to **‘Proposed Appointee’** Tab if you wish
- l. 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 Duties and Responsibilities Tab

- a. Please Note: The Duties and Responsibilities will be auto populated from the Base Job and the Total Percentage must equal 100% to avoid a Form Error.

- b. At the top left, **Click ‘Add’** or at the bottom left **Click on “Add New Row”** to enter new duty/responsibility.
- c. **Enter % time** whenever you add a duty/responsibility; total percentage must equal 100%
- d. **Click on a row and Click ‘Delete Row’ to delete the duty/responsibility;** total percentage must equal 100%
- e. **Click on ‘Move Up’**, last row entered will be moved up; **Click ‘Move Down’**, highlighted row will be moved down; **or Click on ‘Manage Rows’** below 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. **Set Bullets** – access using bullets icon within duty text box. Allows for multiple lines to be formatted into bullets. This is useful when grouping several duties under one section heading is desired
- g. **Click on ‘Content Search’** to search job description library
 - i. **Select jobs** you want to review by selecting ‘All Job Families and Sub-Functions’ or ‘Choose Job Family and Sub-Function’

- h. **Click on job title and Select the duty/responsibility you wish to add to your job**
 - i. **Click on ‘Add to Job’**
 - ii. **Adjust % time** on each duty/responsibility as needed; total percentage must equal 100%
- i. **Click ‘Save’ to save** the information entered
- j. **Click ‘Previous’** to move back to the ‘Job Summary’ Tab if you wish
- k. **Click on ‘Next’ to move to the ‘Qualifications’ Tab**

6. 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 specialty 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 specialty 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 the **'Physical Demands'** Tab

7. Complete the Physical Demands/Working Conditions Tab

- a. **Please Note:** A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act. The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Staff Appointment Change Test - 1009266 [Code: 1009266]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (6)

Staff Appointment Change Test Edit

PHYSICAL DEMANDS/WORKING CONDITIONS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

Reset to Default Undo

A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act. The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Physical Demand	N/A	Rarely	Occasionally	Frequently	Constantly	Details
Standing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Walking	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Stairs	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Sitting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Lifting/Carrying	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Pushing/Pulling	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Climbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Balancing	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Previous Next Save

- b. **For each Physical Demand and Working Condition, Click on either 'Rarely', 'Occasionally', 'Frequently', or 'Constantly' and add 'Details in the Comment box (when necessary), if it is desired to add the physical demand to the job description. Any physical demands not relevant to the job do not require any value to be entered; simply skip that row.**

The N/A option is available if a value for a physical demand was entered in error and no value is desired.

- i. Note: physical demands with no value entered or a value of N/A will not appear on the final view of the job description
- c. Click on **'Reset to Default'** to return the form to its default values.
 - i. A pop up screen to Confirm Action – Are you sure you want to reset to default values? Any changes you have made will be lost! – Click on 'Yes' or 'No'.
- d. **Physical Demands/Working Conditions Comments** – free form entry for any additional details or any physical demands and/or working conditions not represented in the pre-defined lists.
- e. **Please upload any pertinent documentation, if applicable**
 - i. Enter Document Name and click on Upload and select file attachment. Examples include physical demand schedules for certain positions that have been pre-approved by IHR
- f. **Travel Requirements**
 - i. **Est Amount** – click on drop down and select a percentage amount
 - ii. **Add a Brief Description** – free form entry
- g. Click on **'Save'** to save information entered
- h. Click on **'Previous'** to move back to the 'Qualifications' Tab if you wish
- i. Click on **'Next'** to move to 'Approvals and Comments'

8. Review the Approval and Comments Tab

Edit Revision Copy of Job Description 'Staff Appointment Change Test - 1009266' [Code: 1009266]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (6)

This Job is in Workflow: Action Required

Staff Appointment Change Test Edit

Job Information
Proposed Appointee
Off-Cycle Pay Changes
Job Summary
Duties & Responsibilities
Qualifications
Physical Demands
Approvals and Comments

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 & Approval	Unit Hr User10	[N/A]	Not Started
3. Hiring Manager Review	Sean Mahaffey	[N/A]	Not Started
4. College Review and Approval	Andrew Hagler	[N/A]	Not Started
5. IHR Class Analyst Review	Ihr Classification	[N/A]	Not Started
6. IHR Classification Review and Sign-Off	Ihr Classification	[N/A]	Not Started

Reviewer Comments

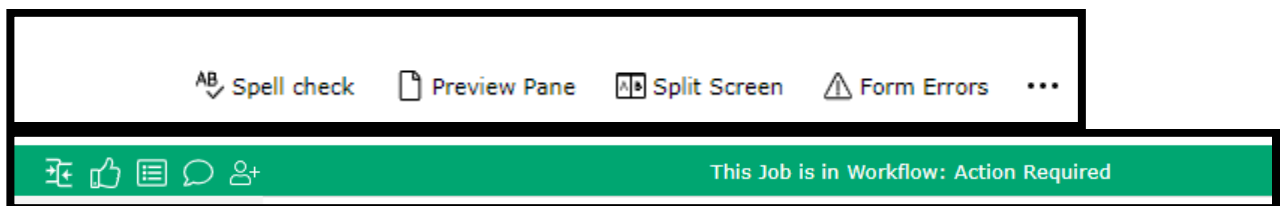
Participant	Date/Time	Comment
Unit Hr User10	6/15/2022 3:09:02 PM	Please expedite this workflow.

Previous Next Save

- a. The six approval steps (Approval Date and Step Status) will be updated as actions are taken.
- b. **Reviewer Comments:** All comments by any approver at any route stop are available to be viewed on this tab.
- c. **Click on 'Save'** to save information entered.
 - i. 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'.
- d. **Click on 'Previous'** to move back to the 'Physical Demands' Tab.

Workflow Action Buttons:

1. Workflow Action Buttons




- a. 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.
 - i. 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

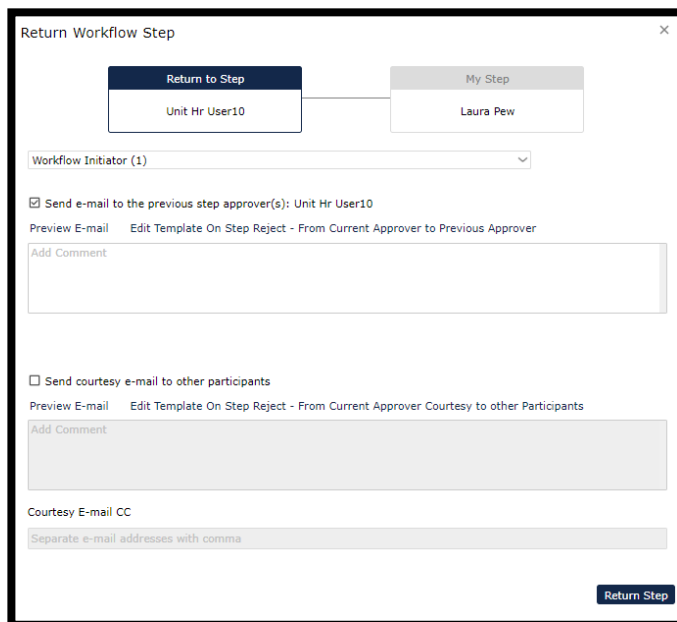
Approve Step

- 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 image shows a web application window titled "Return Workflow Step" with a close button in the top right corner. 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 labeled "Workflow Initiator (1)". There are two main sections for email notifications. The first section is titled "Send e-mail to the previous step approver(s): Unit Hr User10" and has a checked checkbox. It includes links for "Preview E-mail" and "Edit Template On Step Reject - From Current Approver to Previous Approver", followed by a text area labeled "Add Comment". The second section is titled "Send courtesy e-mail to other participants" and has an unchecked checkbox. It includes links for "Preview E-mail" and "Edit Template On Step Reject - From Current Approver Courtesy to other Participants", followed by a text area labeled "Add Comment". At the bottom, there is a field for "Courtesy E-mail CC" with a placeholder "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