



JDX Faculty Appointment Change Job Aid

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How to Access the JDXpert System:

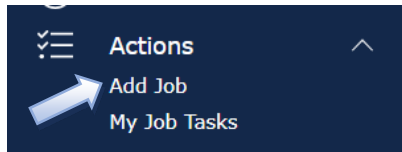
1. Open internet browser and go to: apps.uillinois.edu
2. Select [JDXpert](#) (found on the Human Resources card)
3. Log in to JDXpert using your net ID and password

JDXpert Faculty Appointment Change Overview:

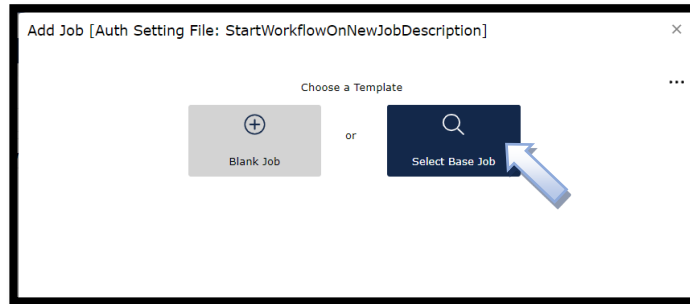
- Transaction Type – Faculty Appointment Change Workflow—Create a Job Description
- Routing required – 4 Steps = Workflow Initiator, Unit HR Review and Sign-off, College Reviews Job Description, OAE review and Sign-off

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”

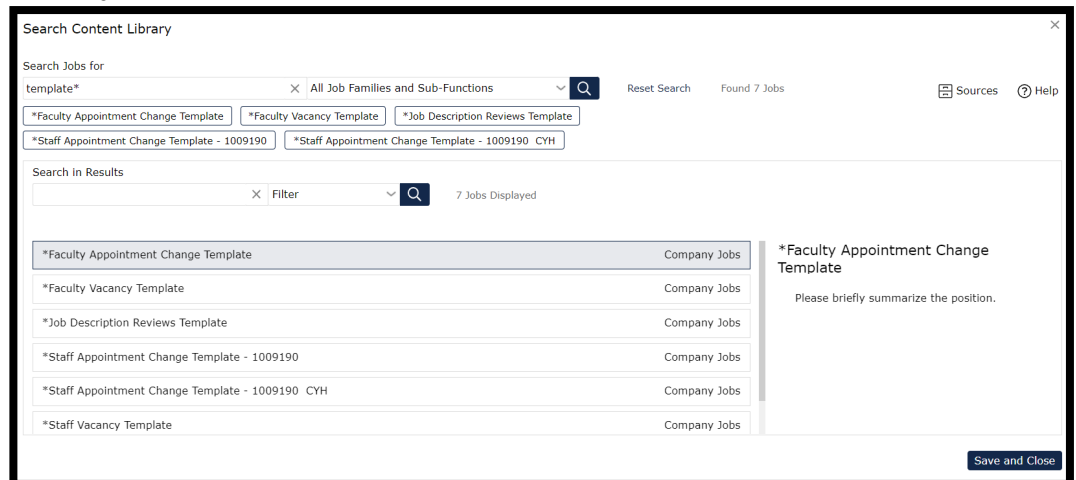


- b. Add Job – Choose a Template:
 - a. Always choose “Select Base Job”



2. Search Content Library

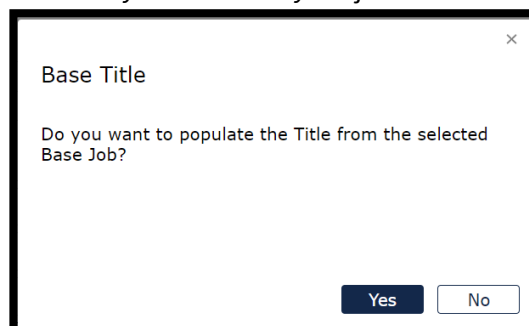
- a. Enter a key job title word



- 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



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.

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

Choosing and Defining Approvers for Workflow Approval Route Steps:

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 web form titled "Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]". The form contains the following fields and sections:


- New Job Code:** 1009314
- New Job Title:** Faculty Appointment Change TEST - JOB Aid
- Unique Job Name:** Faculty Appointment Change TEST - JOB Aid - 1009314
- Select Workflow:** Faculty Appointment Change Requests (4 steps)
- Workflow Initiator:** Unit Hr User10
- Unit HR review and Sign-off:** Laura Pew
- College Reviews Job Description:** Sean Mahaffey
- OAE review:** Oae Access

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.**

The screenshot shows a "Job Workflow Start Report" window. It contains the following information:

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

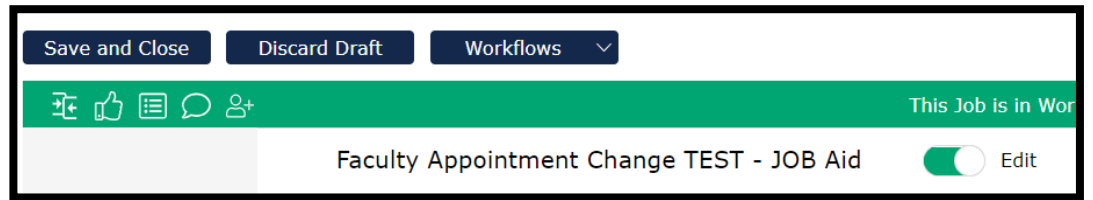
Action	Job	Details
	Faculty Appointment Change TEST - JOB Aid - 1009314	Revision was started.

- 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.




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

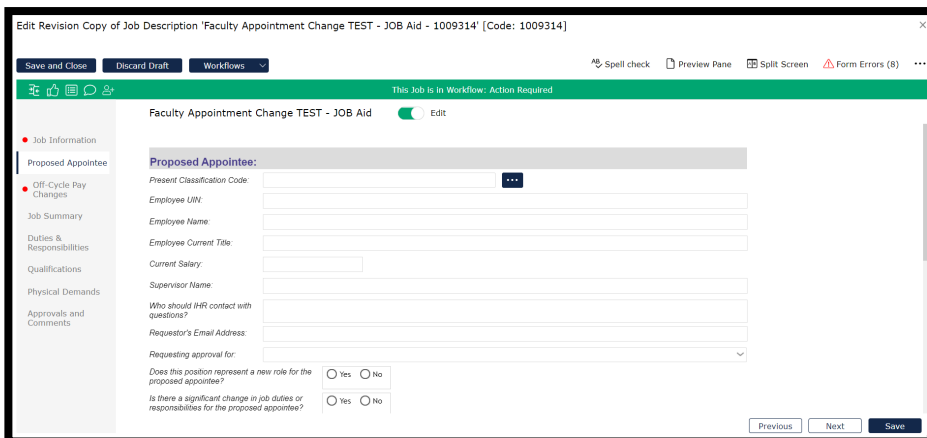
Completing the Workflow Tabs:

1. Complete the Job Information Tab

- Job Location or Region** – auto populates - defaults to ‘Urbana-Champaign, can be changed by using a value from the drop-down list
- Job Description Reason:** auto populates from the base job.
- Appointment Type:** select from the drop down if you know it, if not, leave blank
- Position Number** – will be assigned by IHR if unknown or for a new position
- Position Class Code:**
 - Select from the list if you know it, if not, leave blank and IHR will complete this field.
 - Select a title from the list or enter a search string to find values.
 - Click on “Select and Close”
- Employee Group** – select from drop down if you know it, if not, leave blank
- Employee Class** – select from drop down if you know it, if not, leave blank
- 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

Faculty Appointment Change TEST - JOB Aid Edit

Proposed Appointee:

Present Classification Code

Employee URN

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

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.
 - 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):

Faculty Appointment Change TEST - JOB Aid Edit

Employee Information:

Employee Name:

UIN:

Position Number:

Position Title:

Requestor:

Type of Increase:

Salary Information:

Current Salary:

Date of Last Salary Increase: 6/14/2022

Proposed Salary or Increment Amount:

Proposed Service Basis:

Percentage of Increase:

Previous Next Save

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

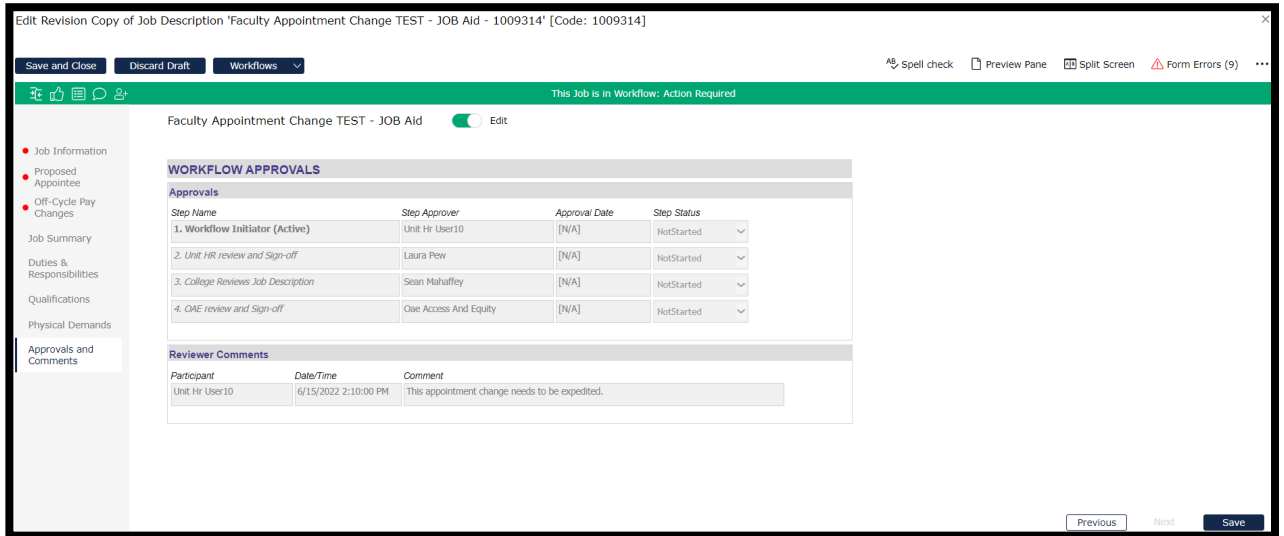
4. Complete the Job Summary Tab

- 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

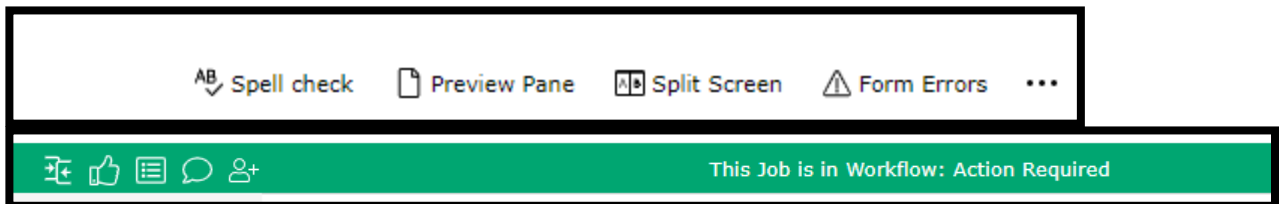
6. Review the Approval and Comments Tab



- a. The four 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 if you wish.

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

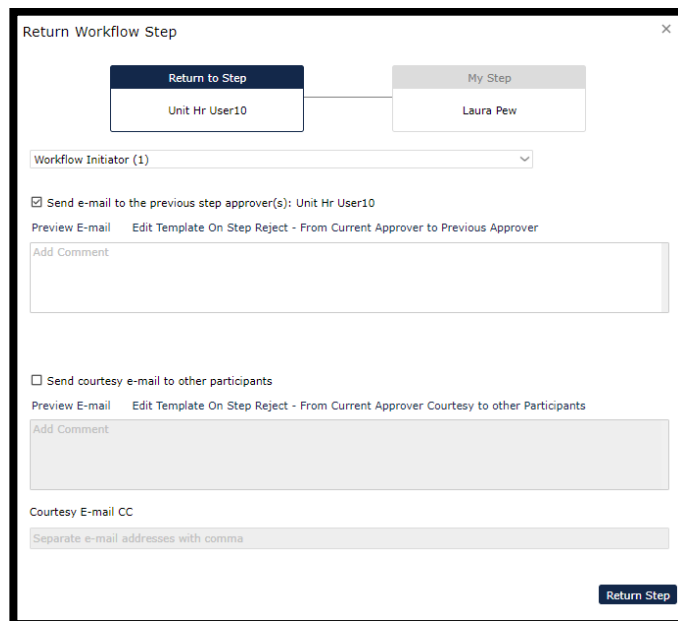
- a. To approve your workflow step, click on the green 'thumbs up'  icon in the top green Actions column.
- b. A Workflow Approval Step screen will appear where you can see yourself in the "My Step" box and the next approver in the "Pending Next Step" box.

The screenshot shows a window titled "Approve Workflow Step" with a close button (X) in the top right corner. At the top, there are two boxes representing workflow steps: "My Step" (light grey) with "Laura Pew" below it, and "Pending Next Step" (dark blue) with "Sean Mahaffey" below it. Below these is a checked checkbox "Send e-mail to the next step approver(s): Sean Mahaffey". Underneath are links for "Preview E-mail" and "Edit Template Step Acceptance - Message to next approver", followed by an "Add Comment" text area. Below that is an unchecked checkbox "Send courtesy e-mail to other participants". Underneath are links for "Preview E-mail" and "Edit Template Step Acceptance - On Accept Courtesy to other participants", followed by another "Add Comment" text area. At the bottom, there is a "Courtesy E-mail CC" field with the instruction "Separate e-mail addresses with comma". In the bottom right corner, there is a dark blue button labeled "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 is a diagram with two boxes: 'Return to Step' (containing 'Unit Hr User10') and 'My Step' (containing 'Laura Pew'). Below this is a dropdown menu labeled 'Workflow Initiator (1)'. There are two main sections for email notifications. The first section has a checked checkbox labeled 'Send e-mail to the previous step approver(s): Unit Hr User10', with a 'Preview E-mail' link and an 'Add Comment' text area. The second section has an unchecked checkbox labeled 'Send courtesy e-mail to other participants', with a 'Preview E-mail' link and another 'Add Comment' text area. At the bottom, there is a 'Courtesy E-mail CC' field with the instruction 'Separate e-mail addresses with comma' and a 'Return Step' button.

- 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.

Last Modified: February 8, 2024