



# JDX Faculty Vacancy Job Aid

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## How to Access the JDXpert System:

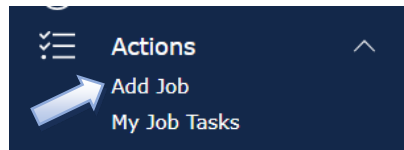
1. Open internet browser and go to: apps.uillinois.edu
2. Select [JDXpert](#) (found on the Human Resources ‘card’)
3. Log in to JDXpert using your net ID and password

## JDXpert Faculty Vacancy Overview:

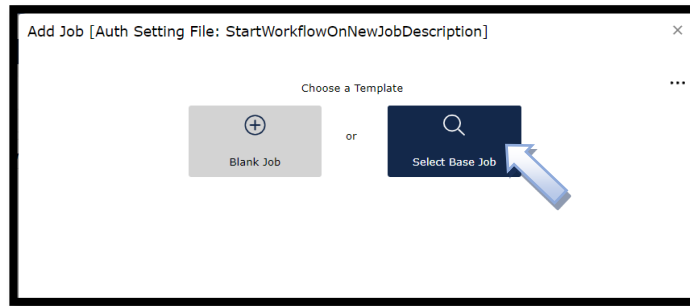
- Transaction Type – Faculty Vacancy Workflow—Create a Job Description (this will form the vacancy posting)
- Routing required – 3 Steps – Workflow Initiator, Unit HR Review and Sign-off, College Reviews Job Description
- Use this workflow to request to hire for a faculty vacancy, whether through search or search waiver

## Add Job in JDXpert to Initiate Faculty Vacancy Workflow:

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

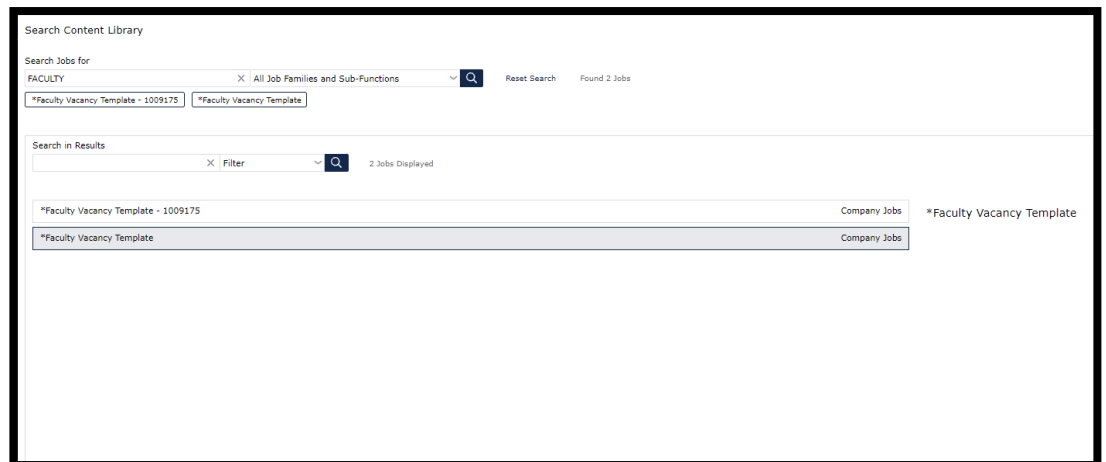


- b. Add Job – Choose a Template:
  - a. Always choose “Select Base Job”.



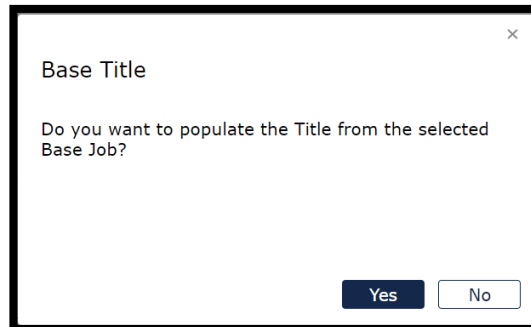
## 2. Search Content Library

- a. Enter a key job title word.

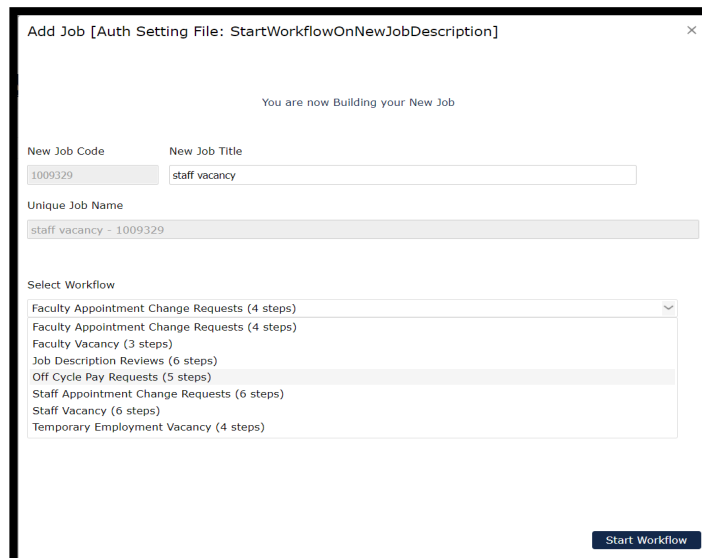


- b. Select a Job Template from the list of Company Jobs (Job Descriptions created on campus and fully approved).
  - a. If no job is found based on your title search, type in “template” and use “\*Faculty Vacancy Template”.
  - b. NOTE: Use “\*Faculty Vacancy Template” will be common until there are more faculty 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 ‘YES’ - you will be able to edit the job title in the next step.
  - b. Select ‘NO’ – you will enter your job title in the next step.



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



- 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 Vacancy (3 steps)” 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 3 steps – you must select an Approver for each of the 3 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’.
2. **Click on ‘Start Workflow’**

Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]

You are now Building your New Job

New Job Code: 1009294    New Job Title: FACULTY TEST

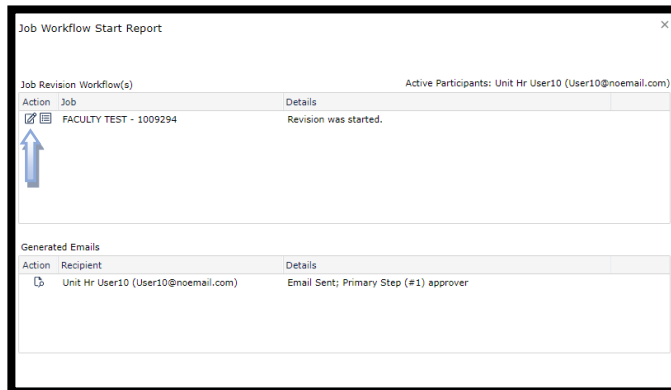
Unique Job Name: FACULTY TEST - 1009294

Select Workflow: Faculty Vacancy (3 steps)

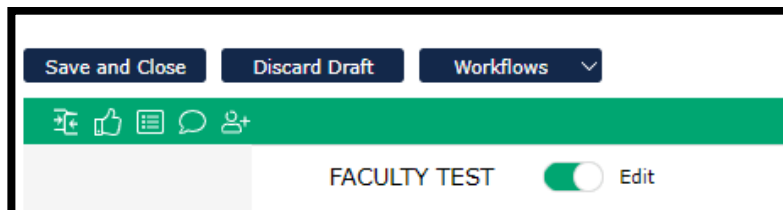
Workflow Initiator	Unit HR review and Sign-off	College Reviews Job Description
Unit Hr User:10	Select Unit HR	Select College Reviewer
+	+	+

Start Workflow

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



- 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

- a. **Classification Title:**

- 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. **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 and Appointment Type:** auto populates from the base job.
  - d. **Position Number** – will be assigned by IHR if unknown or for a new position.
  - e. **Employee Group – auto populates from Base Job.**
  - f. **Employee Class** – select from the drop down.
  - g. **COA** – defaults to ‘1 – Urbana’; should only be changed if this is a ‘System Office’ job.
  - h. **Organization Code** – can be changed using the 
  - i. **Organization Name** – auto populates based on Organization Code.
  - j. **College/Administrative Unit** – auto populates based on Organization Code.
  - k. **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.
  - l. **FTE** – enter a value from 0.0 – 1.0.
  - m. **Is this a multi-level position or multi-hire position?** – only complete if hiring for multiple positions, multiple levels within one search, or both. If hiring for multiple positions with the same job description, only one workflow needs to be completed.
  - n. **Number of Vacancies** – enter number of vacancies being filled. Again, only one workflow is needed to fill multiple positions with the same job description.
  - o. **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).
  - p. **Security Sensitive Questions** – radio buttons.
  - q. **Organizational Relationships** – free form text.
  - r. **Click on ‘Save’** to save information entered so far.
  - s. **Click on ‘Next’ to move to ‘Budget’.**

## 2. Complete the Budget Tab

- a. **Do you have a hiring plan approval code from the Provost Office?** – auto populates from the Base Job but should be changed based on the need of the current request.
  - i. **No** will display all fields on the tab to be completed. IHR will review and include the Provost office for approval when needed.
  - ii. **Yes** will display only a small subset of the fields on this tab. Providing a hiring plan approval code will be required for this option to finalize the workflow.
  - iii. **Yes, but I need a hiring request form** will display all the fields that “No” presents, but a hiring plan approval code will be required for this option as well to finalize the workflow. This option is to accommodate the internal processes of some units that still require a hiring request form in certain cases, even when budgetary approval for the position has been obtained previously.
- b. **Organization Name** – auto populates from Job Information Tab.
- c. **College/Administrative Unit** – auto populates from Job Information Tab.
- d. **Contact Name** – free form entry.
- e. **Job Title** – auto populates from Job Information Tab.
- f. **Number of Vacancies** – auto populates from Job Information Tab.
- g. **Full Time Equivalent** – auto populates from Job Information Tab.
- h. **Proposed Start Date** – auto populates from Job Information Tab, can change if necessary by clicking on  and **Select Date** – ‘**Select and Close**’.
- i. **Budget Profile Code** – auto populates from Job Information Tab, can change if necessary by using the drop down list, clicking on the desired value.
- j. **Hire Type** – **Click** on Faculty.
- k. **Position Type** – **Click** on Permanent or Visiting.

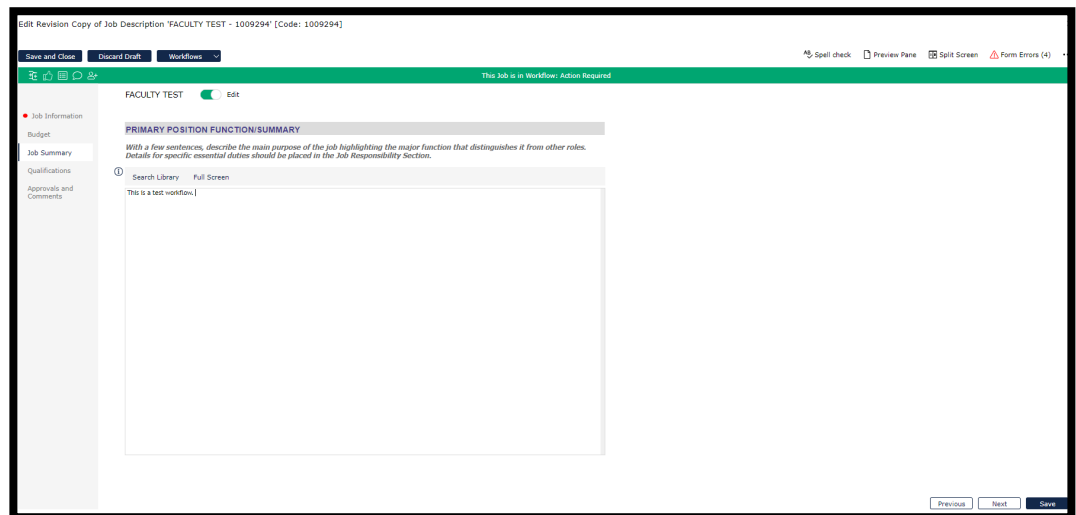
- l. **Position Status** – Click on ‘New Position’ or ‘Vacant Position’.
- m. **Length of Appointment** – free text field (9/12, 12/12, Summer, etc).
- n. **Budgeted Salary Min Range:** – free text field, please provide annualized pay.
- o. **Budgeted Salary Max Range:** – free text field, please provide annualized pay.
- p. **Offer Salary Min Range:** – free text field. **Enter the minimum** salary you would like to request to offer a candidate.
- q. **Offer Salary Max Range:** – free text field. **Enter maximum** salary you would like to request to offer a candidate. Defining an approved range for offer salary is part of the workflow approval process. Job offer salaries made within this approved range (or within 10% of maximum, if applicable) salaries **do not** need additional approval from IHR Compensation at time of offer.
- r. **Funding Source** – total funding source percentages must equal 100%.
  - i. **Enter % State Funds** – Department: free text field.
  - ii. **Enter % Other** (Specify Details Below): free text field.
  - iii. **FOAP:** Different FOAPs used must add up to 100%. Note the validation tool for this purpose at the upper right of the FOAP tool.
  - iv. **COA/Percentage:** Use the drop down lists to select a value.
  - v. **Fund/Orgn/Account/Program**– free text fields.
- s. **Guiding Principles** – will auto populate from the Base Job, you will need to use the check box to determine if this should be included in this Job Description, and use the comment box for additional information on how this applies to the position.
- t. **Justification for Filling the Position:**
  - i. **Could the duties of the position be redistributed on a short-term basis?**
    - a. Defaults to No, can change if necessary using the radio buttons.
  - ii. **Document any negative consequences that would occur if the proposed position action were delayed or remained unfilled.** – Free form entry.
  - iii. **Describe the funds you have available to ensure you can make this hire without incurring deficits. Are you able to demonstrate the financial ability to sustain the costs if funding is reduced?** - Free form entry.
  - iv. **General Comments** – free text field. Comments relevant to the budget of this position can be made here; downstream approvers and reviewers will be able to see these comments.
  - v. **Please upload any pertinent documentation, if applicable:**
    - a. **Click** on “Upload...”.



- b. **Enter** Document Name and click on Upload and select file attachment.
- vi. **Notes to unit (IHR Use Only)** – please leave blank. This field is for IHR to communicate notes and information back to the unit as part of the review process.
- u. **Click on ‘Save’** to save information entered so far.
- v. **Click on ‘Previous’** to move back to the Job Information Tab if you wish.
- w. **Click on ‘Next’ to move to ‘Job Summary’.**

### 3. Complete the Job Summary Tab

- a. **Primary Position Function/Summary** – This will auto populate from the Base Job selected.



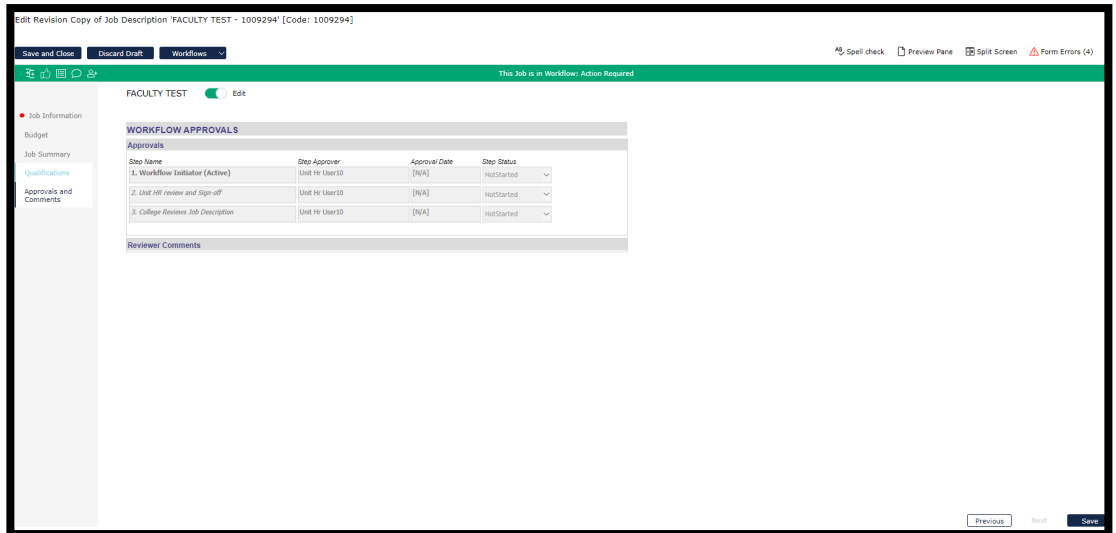
- b. This is a free-text field of your job’s primary function or you can use the **Search Library** function.
  - i. **Click** “Search Library”.
  - ii. Use the search function at the top of the page to search for keywords related to Job Title or Job contents.
  - iii. **Select** a Job from the list. The Primary Position Function/Summary will appear on the right-hand side of the screen.
  - iv. If you want to copy/paste the Position Summary from another document, please complete the following steps:
    - a. **Click** ‘Full Screen’.
    - b. Paste your Summary.
    - c. Click ‘Save and Close’.

- c. **Click on ‘Save’** to save information entered so far.
- d. **Click on ‘Previous’** to move back to the Job Information Tab if you wish.
- e. **Click on ‘Next’ to move to ‘Qualifications’.**

#### 4. 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. **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.
- c. **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.
- d. **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).
- e. **Click on ‘Save’** to save information entered.
- f. **Click on ‘Previous’** to move back to the **‘Job Summary’** if you wish.
- g. **Click on ‘Next’** to move to **‘Approvals and Comments’**.

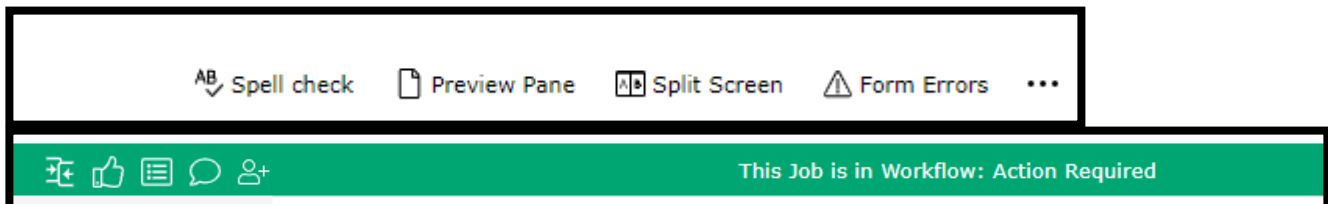
#### 5. Review the Approval and Comments Tab



- a. The three 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 '**Qualifications**' 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.

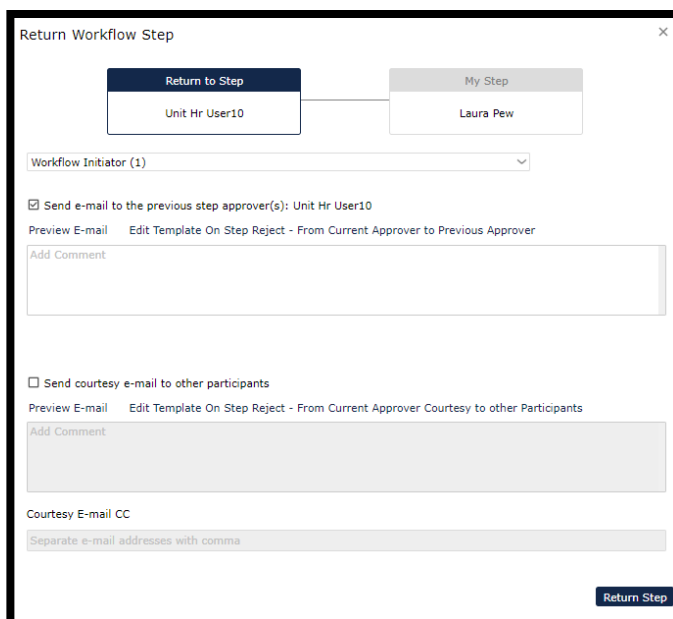
The screenshot shows a window titled "Approve Workflow Step" with a close button (X) in the top right corner. The window contains a workflow diagram with two boxes: "My Step" (light grey) with "Laura Pew" below it, and "Pending Next Step" (dark blue) with "Sean Mahaffey" below it. Below the diagram are two sections for email configuration. The first section has a checked checkbox "Send e-mail to the next step approver(s): Sean Mahaffey", a "Preview E-mail" link, an "Edit Template Step Acceptance - Message to next approver" link, and an "Add Comment" text area. The second section has an unchecked checkbox "Send courtesy e-mail to other participants", a "Preview E-mail" link, an "Edit Template Step Acceptance - On Accept Courtesy to other participants" link, and an "Add Comment" text area. At the bottom, there is a "Courtesy E-mail CC" field with the placeholder text "Separate e-mail addresses with comma" and an "Approve Step" button.

- 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, 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 but 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.



- 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):** will automatically be 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 automatically be 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 an email will be sent back to the Workflow Initiator indicating the workflow has been fully approved.

*Last Modified: February 8, 2024*