



# JDX Job Description Reviews Job Aid

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## How to Access the JDXpert System:

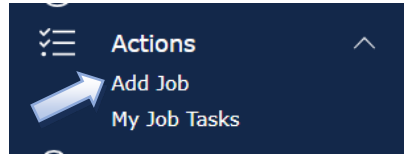
1. Open internet browser and go to: apps.uillinois.edu
2. Select [JDXpert](#) (found on the Human Resources ‘card’)
3. Log in to JDXpert using your net ID and password

## JDXpert Job Description Reviews Overview:

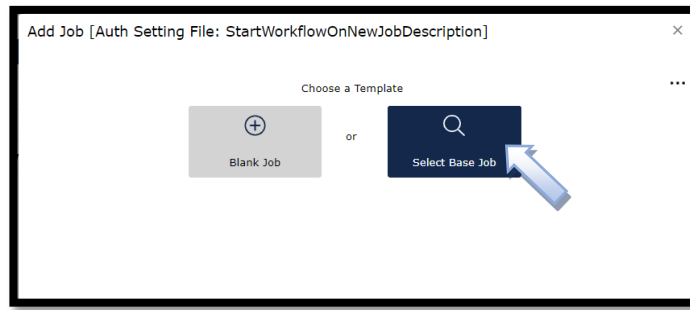
- Transaction Type – Annual Job Description Review Workflow—Review a Job Description
- Routing required – 6 Steps – Workflow Initiator, Unit HR Review and Sign-off, Hiring Manager Review, College Reviews Job Description, IHR Class Analyst Review and Sign-Off, IHR Classification Review and Sign-off
- Us this workflow to make updates to an existing job description as part of the triennial job description update process

## Review Job in JDXpert to Initiate Job Description Reviews Workflow:

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

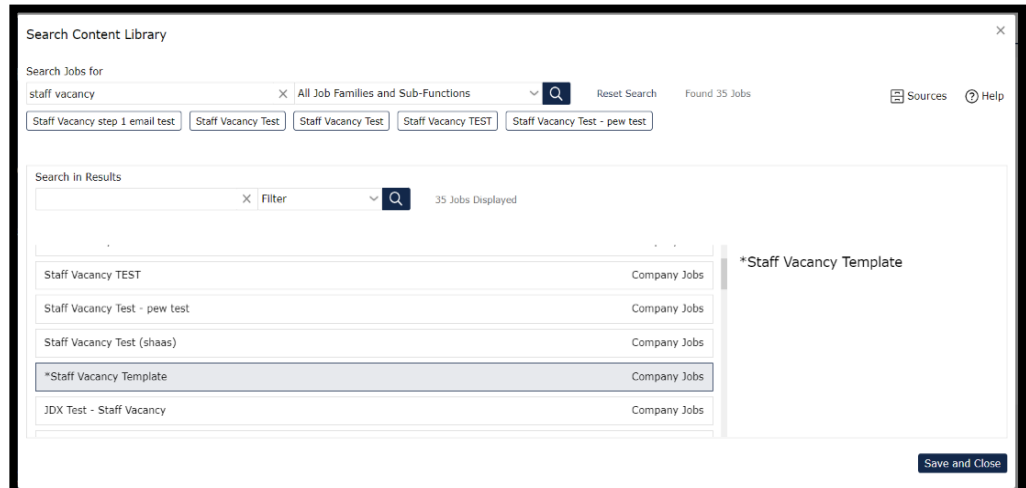


- b. Add Job – Choose a Template:
  - a. Always choose “Select Base Job”.



## 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 title search, type in “template” and use “\* Job Description Review Template”. However, you should use the job description you are updating as the base job if it exists in the library.
  - b. NOTE: Use “\* Job Description Review Template” will be common until there are more 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. ‘Yes’ -- you can still edit your job title in the next step.
- b. ‘NO’ – you will enter your job title in the next step.

4. **Add Job** – updating your job description.

a. **Enter Your New Job Title (if the title isn't changing, enter the current 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 "Job Description Review" (6 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 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'.**

The screenshot shows a pop-up window titled "Add Job [Auth Setting File: StartWorkflowOnNewJobDescription]". The main heading is "You are now Adding a New Blank Job".

Fields include:

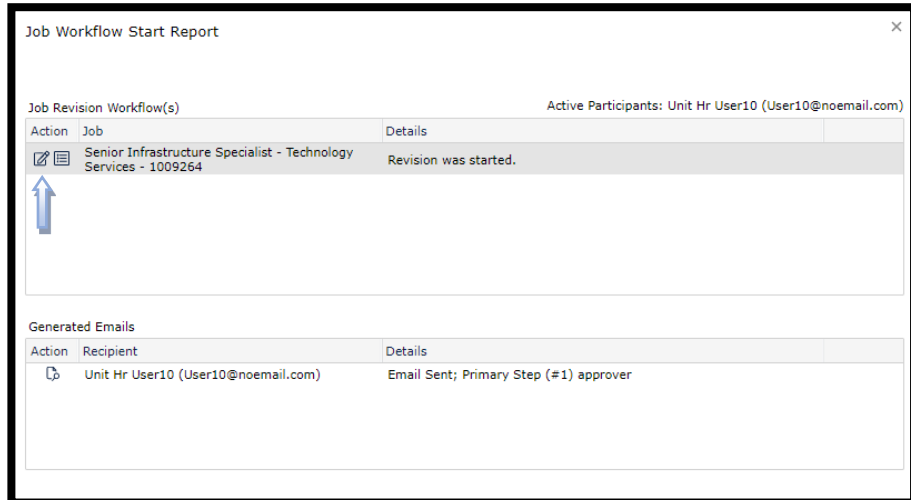
- New Job Code:** 1009264
- New Job Title:** Senior Infrastructure Specialist - Technology Services
- Unique Job Name:** Senior Infrastructure Specialist - Technology Services - 1009264
- Select Workflow:** Staff Vacancy (6 steps)

Below these fields is a table of workflow participants:

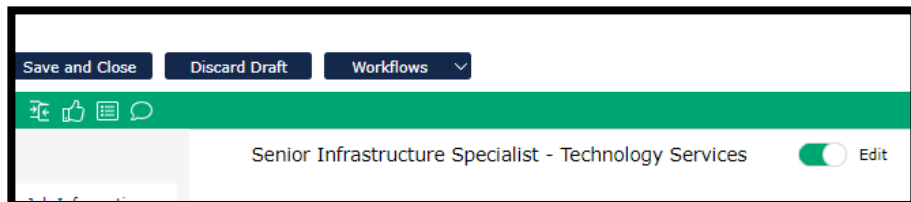
Workflow Initiator	Unit HR review and Sign-off	Hiring Manager Review	Colleg
Unit Hr User10	Laura Pew	Sean Mahaffey	
+	+	+	

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 job description review.**



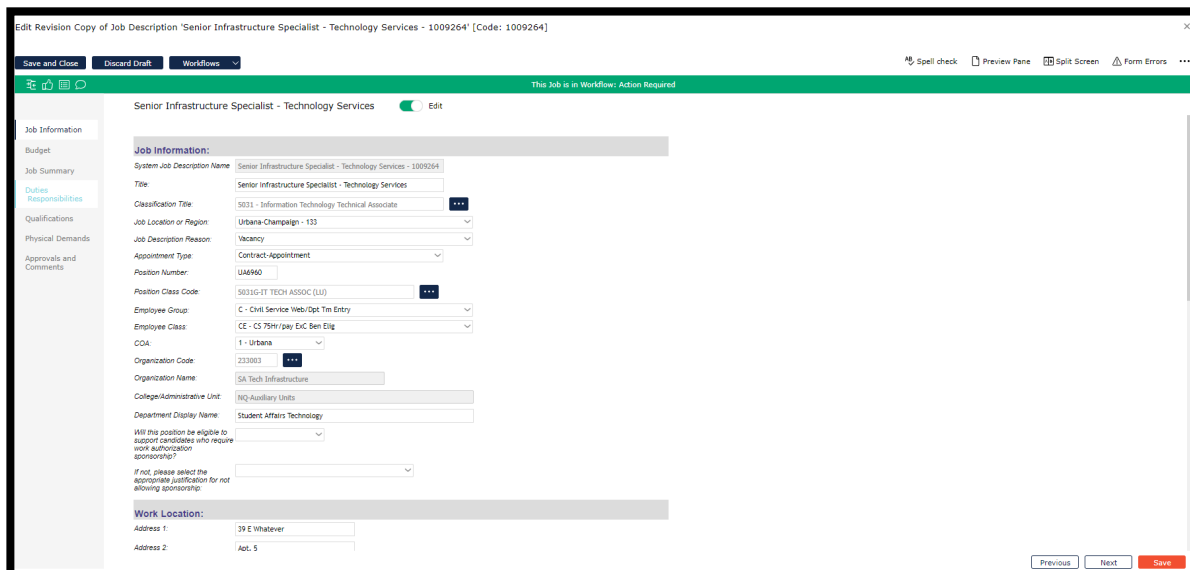
- b. After you click on the Edit Pencil, you will be brought into the workflow on the Job Information Tab.
- c. At the top center of the page, the “Edit” **toggle should be ON**, if not, slide the toggle to ON.






- 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. **System Job Description Name:** auto populates.
- b. **Title:** free form entry.
- c. **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”.
- d. **Job Location or Region** – auto populates - defaults to ‘Urbana-Champaign, can be changed by using a value from the drop-down list.
- e. **Job Description Reason and Appointment Type:** auto populates from the base job.
- f. **Position Number** – will be assigned by IHR if unknown or for a new position.
- g. **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”.
- h. **Employee Group** – select from drop down if you know it, if not, leave blank.
- i. **Employee Class** – select from drop down if you know it, if not, leave blank.
- j. **COA** – defaults to ‘1 – Urbana’; should only be changed if this is a ‘System Office’ job.
- k. **Organization Code** – can be changed using the 
- l. **Organization Name** – auto populates based on Organization Code.
- m. **College/Administrative Unit** – auto populates based on Organization Code.
- n. **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.
- o. **Work Location Fields** – this section will only appear for contract appointments, complete with information on the actual location of the position.
- p. **FTE** – enter a value from 0.0 – 1.0.
- q. **Shift and Work Schedule** – only complete if relevant to the position (e.g. Shift: Evenings; Work Schedule: T-S 4-11:30).

- r. **Ability to Work Remotely** – Select appropriate radio button; this is for reporting and informational purposes and does not impact the job posting or ability for position to work remotely (or not).
- s. **Flex Schedule:** select appropriate radio button.
- t. **Number of Vacancies** – enter number of vacancies being filled. Again, only one workflow is needed to fill multiple positions with the same job description.
- u. **Comments** – used to convey information to IHR or other downstream reviewers.
- v. **Is the position Security Sensitive?** Select appropriate radio button.
- w. **Is this a Protection of Minors position?** Select appropriate radio button.
- x. **Purchasing Authority of \$5,000 or more?** Select appropriate radio button.
- y. **Supervisory Authority of 20 or more?** Select appropriate radio button.
- z. **Organizational Relationship:** free form text, Enter reporting hierarchy.
- aa. **Click ‘Save’ to save information entered so far.**
- bb. **Click ‘Next’ to move to ‘Job Summary’ tab.**

## 2. Complete the Proposed Appointee Tab

- a. **Employee UIN:** Enter UIN of the person you wish to appoint
- b. **Employee Name:** Enter the name of the person you wish to appoint
- c. **Enter Document Name and click on Upload and select file attachment.** Upload any pertinent documents to the workflow.
- d. Click **‘Save’** to save information entered
- e. Click **‘Previous’** to move back to **‘Job Information’** Tab if you wish
- f. Click **‘Next’** to move to **‘Job Summary’** Tab

### 3. Complete the Job Summary Tab

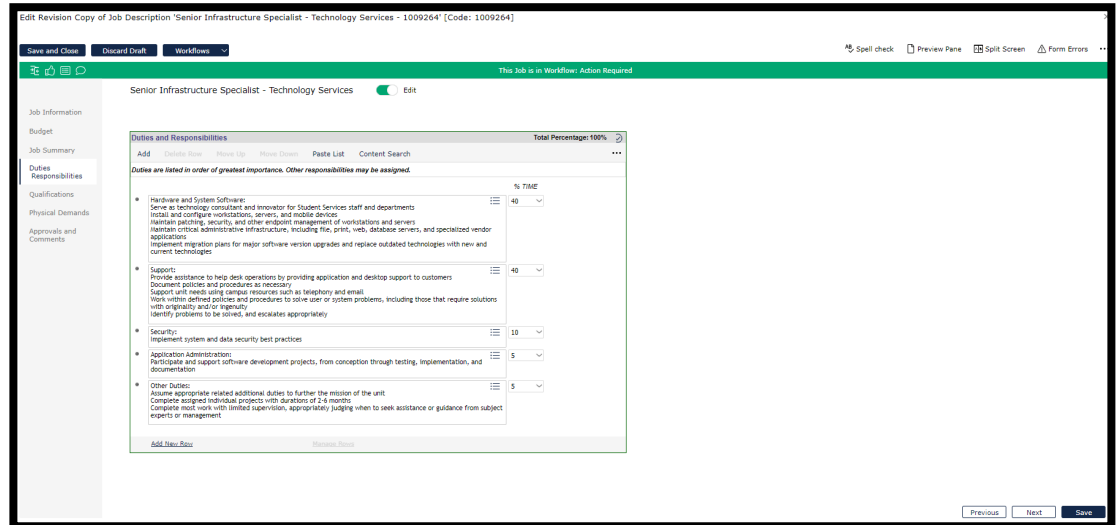
- a. **Primary Position Function/Summary** – This will auto populate from the Base Job selected.

- 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 below. 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 **'Job Information'** Tab if you wish.
- e. **Click on Next to move to 'Duties/Responsibilities'.**

### 4. 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 should 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 should be 100%.
- d. **Click on a row and Click 'Delete Row' to delete the duty/responsibility**; total percentage should be 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 what you want to do what you want to do (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 should be 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 'Qualifications'**.

## 5. Complete the Qualifications Tab:

The screenshot shows a web-based form for a job posting. The title is 'Senior Infrastructure Specialist - Technology Services'. The form is divided into several sections: 'Job Information', 'Budget', 'Job Summary', 'Duties', 'Responsibilities', 'Qualifications', 'Physical Demands', 'Approvals and Comments', and 'Comments'. The 'Qualifications' section is currently active and contains the following fields: 'Minimum Qualifications', 'Specialty Factors', 'Preferred Qualifications', and 'Knowledge, Skills and Abilities (KSA)'. The 'KSA' section is open, showing a search bar and a list of KSAs with search icons. The 'KSA' section also includes an 'Add New Row' button and a 'Manage Rows' button.

- 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 (KSA):**
  - 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’**.

## 6. 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.

Edit Revision Copy of Job Description 'Senior Infrastructure Specialist - Technology Services - 1009264' [Code: 1009264]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors

This Job is in Workflow: Action Required

Senior Infrastructure Specialist - Technology Services Edit

Job Information  
Budget  
Job Summary  
Duties  
Responsibilities  
Qualifications  
Physical Demands  
Approvals and Comments

**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 Details

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 type="radio"/>	<input type="radio"/>	<input checked="" 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 type="radio"/>	<input checked="" 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 type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Climbing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Balancing	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Bending/Stooping	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Kneeling	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Squatting/Crouching	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Crawling	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Reaching	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Grip/Dexterity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Twisting	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Talking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	

Previous Next Save

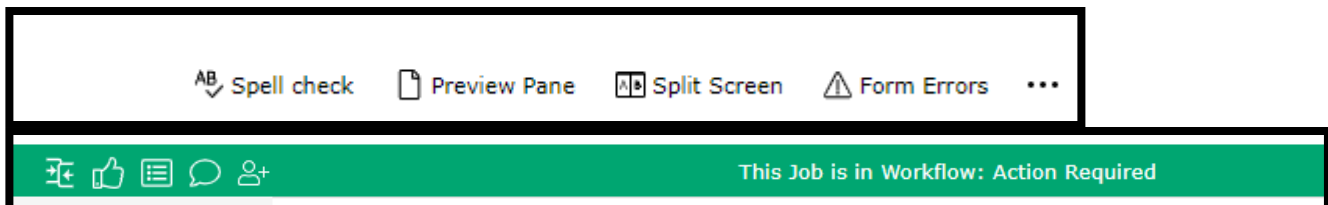
- b. **For each Physical Demand and Working Condition, Click on either ‘Rarely’, ‘Occasionally’, ‘Frequently’, or ‘Constantly’ and add ‘Details in the Comment box (when necessary), if it is desired to add the physical demand to the job description. Any physical demands not relevant to the job do not 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’.**

7. **Review the Approval and Comments Tab:**

- 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** - 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". At the top, there is a flow diagram with two boxes: "My Step" (containing "Laura Pew") and "Pending Next Step" (containing "Sean Mahaffey"). Below this, there are two main sections. The first section has a checked checkbox "Send e-mail to the next step approver(s): Sean Mahaffey" and links for "Preview E-mail" and "Edit Template Step Acceptance - Message to next approver". It includes a text area labeled "Add Comment". The second section has an unchecked checkbox "Send courtesy e-mail to other participants" and links for "Preview E-mail" and "Edit Template Step Acceptance - On Accept Courtesy to other participants". It also includes a text area labeled "Add Comment". At the bottom, there is a field for "Courtesy E-mail CC" with the instruction "Separate e-mail addresses with comma". An "Approve Step" button is located in the bottom right corner.

- 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 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.

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 options. The first section is titled 'Send e-mail to the previous step approver(s): Unit Hr User10' and is checked. It includes a 'Preview E-mail' link, an 'Add Comment' text area, and an 'Edit Template On Step Reject - From Current Approver to Previous Approver' link. The second section is titled 'Send courtesy e-mail to other participants' and is unchecked. It includes a 'Preview E-mail' link, an 'Add Comment' text area, and an 'Edit Template On Step Reject - From Current Approver Courtesy to other Participants' link. At the bottom, there is a 'Courtesy E-mail CC' field with the instruction 'Separate e-mail addresses with comma'. A 'Return Step' button is located at the bottom right of the dialog.

- 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.