



JDX Staff 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

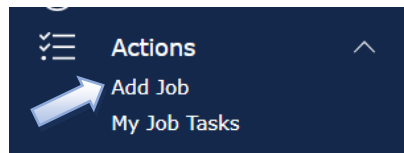
JDXpert Staff Vacancy Overview:

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

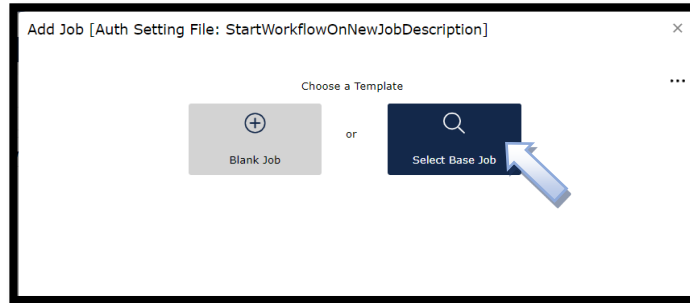
Add Job in JDXpert to Initiate Staff Vacancy Workflow:

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

- a. Select “Add Job”.

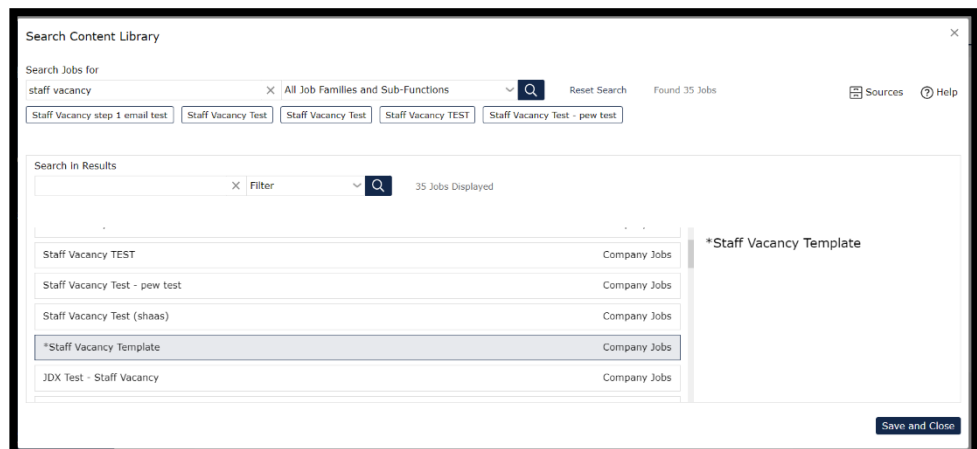


- b. Add Job – Choose a Template:
 - a. Always choose “Select Base Job”.



2. Search Content Library

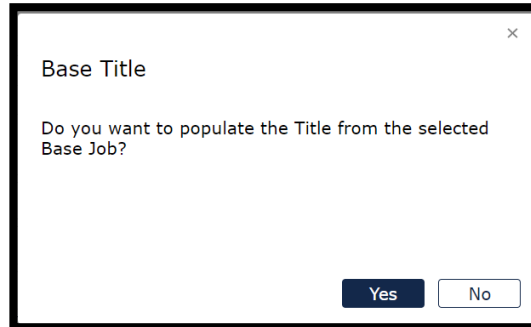
- a. Enter a key job title word.



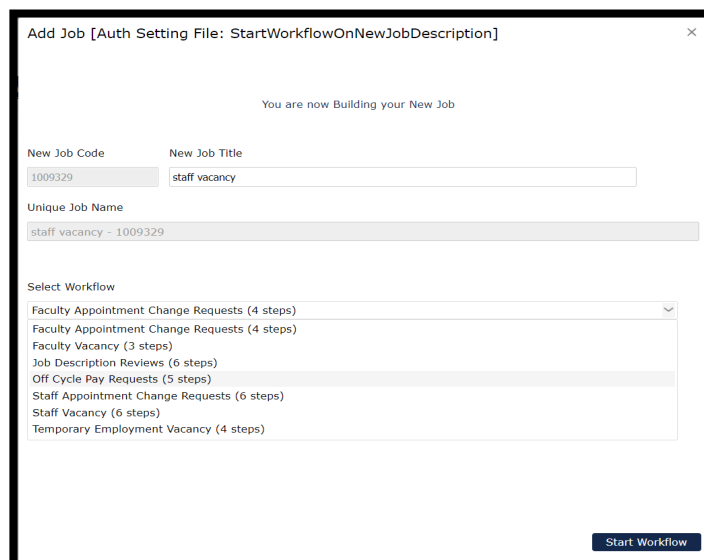
- b. Select a Job Template from the list of Company Jobs (Job Descriptions created on campus and fully approved).
 - a. If no job is found based on title search, type in ‘template’ and use “*Staff Vacancy Template”.
 - b. NOTE: Use “*Staff Vacancy Template” will be common until there are more staff vacancy 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 still be able to edit your 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 “Staff Vacancy (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.

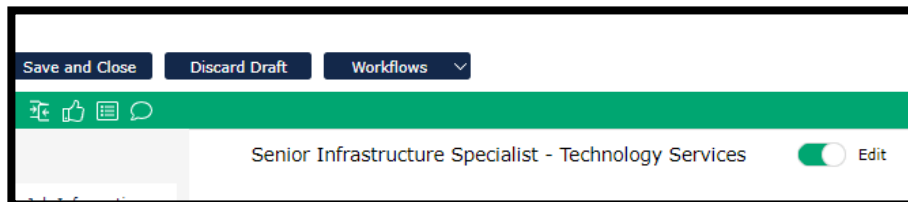
- iii. Click on 'Add Participant'.
- c. **Click on '+' for Hiring Manager Review** (Supervisor).
 - i. In 'Search', enter the Hiring Manager Reviewer's net ID.
 - ii. Click on the 'Emplid' you are searching for.
 - iii. Click on 'Add Participant'.
- d. **Click on '+' for College Reviews Job Description.**
 - i. In 'Search', enter the College HR 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'.**

- 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
	Senior Infrastructure Specialist - Technology Services - 1009264	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

Edit Revision Copy of Job Description 'Senior Infrastructure Specialist - Technology Services - 1009382' [Code: 1009382] [Auth Setting File: StartWorkflowOnNewJobDescription]

Save and Close Discard Draft Workflows

Spell check Preview Pane Split Screen Form Errors (1)

This Job is in Workflow: Action Required

Senior Infrastructure Specialist - Technology Services Edit

Job Information

Budget

Proposed Appointee

Off-Cycle Pay Changes

HR Use Only

Job Summary

Duties & Responsibilities

Qualifications

Physical Demands

Scope

FLSA

Approvals and Comments

Disclaimer

Job Information:

System Job Description Name: Senior Infrastructure Specialist - Technology Services - 1009382

System Job Code: 1009382

Title: Senior Infrastructure Specialist - Technology Services

Classification Title: 5031 - Information Technology Technical Associate

Has this position been reviewed and approved by IHR within the last 12 months (excludes job description reviews/updates)? Yes No

Have there been any changes to the job description since the last approved date? Yes No

Express Workflow: Express Workflow

Job Location or Region: Urbana-Champaign - 133

Job Description Reason: Vacancy




Appointment Type: Contract-Appointment

Position Number: UA6960

Position Class Code: 5031G-IT TECH ASSOC (LU)


Employee Group: C - Civil Service Web/Dpt Tm Entry

Previous Next Save

- 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. **Has this position been reviewed and approved by IHR within the last 12 months (excludes job description reviews/updates)?**
 - i. Select “Yes” or “No”
- c. **Have there been any changes to the job description since the last approved date?**
 - i. Select “Yes” or “No”
- d. **Express Workflow:**
 - i. As long as the job description being submitted has been approved in the last 12 months for a previous staff vacancy or promotion, and there are no changes to the job description itself, the workflow will automatically qualify as Express and be treated as such by IHR Classification for an expedited review and approval.
- e. **Job Location or Region** – auto populates - defaults to ‘Urbana-Champaign, can be changed by using a value from the drop down list.
- f. **Job Description Reason and Appointment Type:** auto populates from the base job.
- g. **Position Number** – will be assigned by IHR if unknown or for a new position.
- h. **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”.
- i. **Employee Group** – select from drop down if you know it, if not, leave blank.
- j. **Employee Class** – select from drop down if you know it, if not, leave blank.
- k. **COA** – defaults to ‘1 – Urbana’; should only be changed if this is a ‘System Office’ job.
- l. **Organization Code** – can be changed using the 
- m. **Organization Name** – auto populates based on Organization Code.

- n. **College/Administrative Unit** – auto populates based on Organization Code.
- o. **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.
- p. **Employment Eligibility question** – answer Yes if offering sponsorship for this position; if not sponsoring, select No.
- q. **Employment Eligibility justification** – only choose one of the preset justifications from the drop down if “No” is selected for the sponsorship question above.
- r. **Work Location Fields** – this section will only appear for contract appointments; complete with information on the actual location of the position.
- s. **FTE** – enter a value from 0.0 – 1.0
- t. **Shift and Work Schedule** – only complete if relevant to the position (e.g. Shift: Evenings; Work Schedule: T-S 4-11:30).
- u. **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).
- v. **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.
- w. **Number of Vacancies** – enter number of vacancies being filled. Again, only one workflow is needed to fill multiple positions with the same job description.
- x. **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).
- y. **Click on ‘Save’** to save information entered so far.
- z. **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. **Length of Appointment** – free text field (9/12, 12/12, Summer, etc).
- k. **Budgeted Salary Min Range:** – free text field, please provide annualized pay.

- l. **Budgeted Salary Max Range:** – free text field, please provide annualized pay.
- m. **Offer Salary Min Range:** – free text field. Enter the minimum salary you would like to request to offer a candidate.
- n. **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) **do not** need additional approval from IHR Compensation at time of offer.
- o. **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.
- p. **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.
- q. **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.

- r. **Click on ‘Save’** to save information entered so far.
- s. **Click on ‘Previous’** to move back to the Job Information Tab if you wish .
- t. **Click on ‘Next’ to move to ‘Job Summary’.**

3. Complete the Job Summary Tab

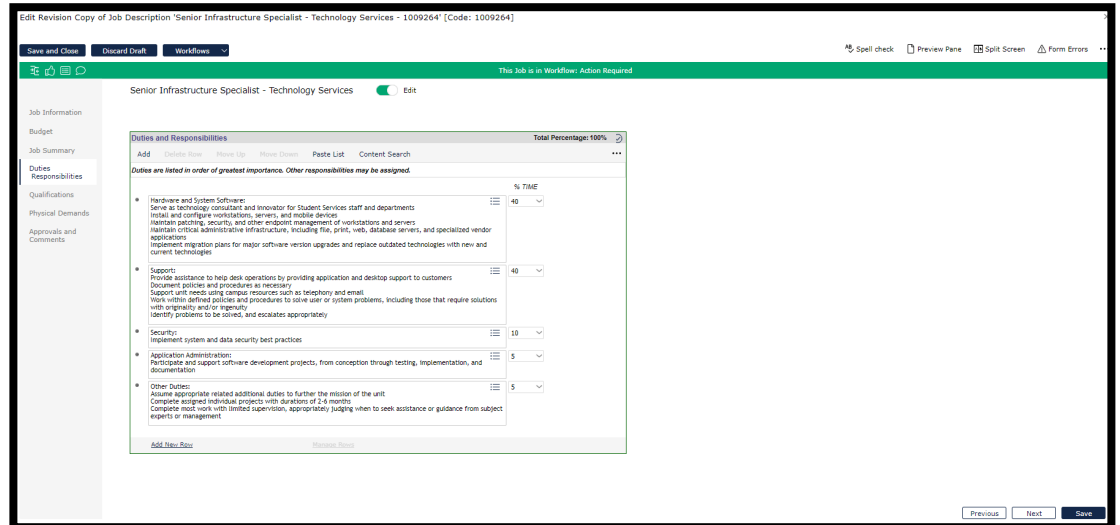
- a. **Primary Position Function/Summary** – This will auto populate from the Base Job selected.

The screenshot shows a web-based HR system interface. At the top, there's a navigation bar with 'Save and Close', 'Discard Draft', and 'Workflows' buttons. Below that, the job title 'Senior Infrastructure Specialist - Technology Services' is displayed. The left sidebar contains a menu with 'Job Information', 'Budget', 'Job Summary', 'Duties Responsibilities', 'Qualifications', 'Physical Demands', 'Approvals and Comments'. The main content area is titled 'PRIMARY POSITION FUNCTION/SUMMARY' and includes a search bar with 'Search Library' and 'Full Screen' options. Below the search bar, there's a text area with the following content: 'Applications are now being accepted for the Infrastructure Specialist and Senior Infrastructure Specialist positions for Student Affairs Technology at the University of Illinois at Urbana-Champaign. Student Affairs Technology serves as the IT department for a variety of Student Affairs units on the campus to provide better efficiency, broader support, and operational resilience, as well as create robust employment environments for the IT staff. We are seeking individuals with diverse backgrounds who can help create and foster communities that strive toward our vision. This includes supporting the academic mission of the University by developing environments conducive to student learning and academic success, respecting, advocating for the interests of our student population, and supporting the holistic development of all of our students. The University of Illinois is an Equal Opportunity, Affirmative Action employer that recruits and hires qualified candidates without regard to race, color, religion, sex, sexual orientation, gender identity, age, national origin, disability or veteran status. For more information, visit <http://go.illinois.edu/EOE>.' At the bottom right of the text area, there are 'Previous', 'Next', and 'Save' buttons.

- 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 Budget 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 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 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 requisition. The title is "Senior Infrastructure Specialist - Technology Services". The form is divided into several sections:

- QUALIFICATIONS:** A section with a sub-header "To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions." It contains three sub-sections:
 - Minimum Qualifications:** Includes education requirements (Bachelor's degree in Information Technology, IT Management, or a closely related discipline) and experience (96-120 semester hours or Bachelor's degree in Information Technology, IT Management, or a closely related discipline).
 - Specialty Factors:** A field for additional requirements.
 - Preferred Qualifications:** Lists preferred skills such as "Bachelor's degree in Information Systems, Computer Science, Business or other related field", "Experience with Apple OS and iOS in an enterprise environment", "Experience with Linux, Apache, MySQL, PHP (LAMP) servers and services", "Experience with digital storage and/or CCTV systems", and "Experience administering IIS, SQL Server and IIS web servers".
- Knowledge, Skills and Abilities (KSA):** A section with a sub-header "Select appropriate Knowledge, Skills and Abilities for this job description." It features a table with columns for "Add", "Delete Row", "Move Up Row", "Move Down Row", "Paste List", and "Global Search". Below the table are input fields for "test skills" and "test knowledge", each with a search icon. At the bottom of the table are "Add New Row" and "Remove Rows" buttons.

- 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

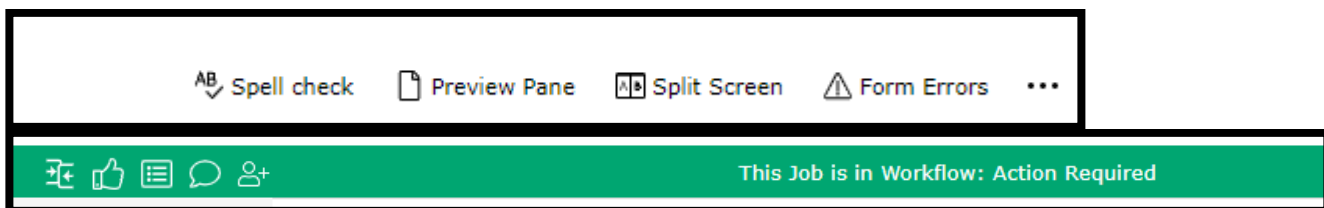
- b. **For each Physical Demand and Working Condition, Click on either ‘Rarely’, ‘Occasionally’, ‘Frequently’, or ‘Constantly’ and add ‘Details in the Comment box (when necessary), if it is desired to add the physical demand to the job description. Any physical demands not relevant to the job do not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




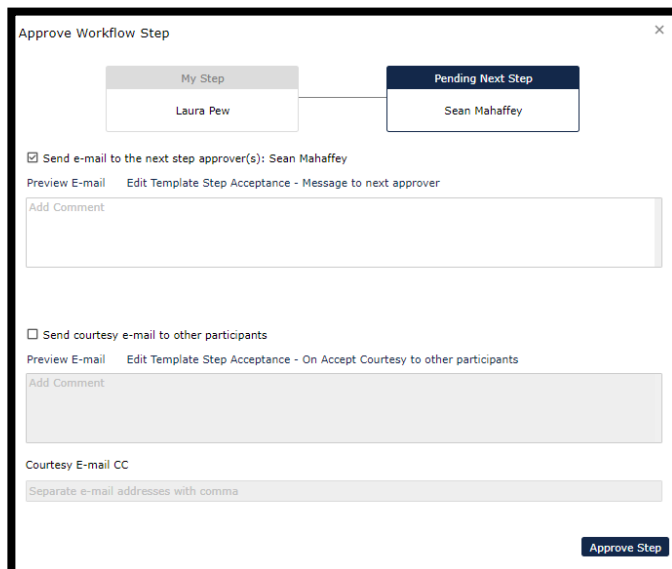
- a. You can review **Form Errors** by clicking on 'Form Errors' on the top left on the screen. These indicate where you have information missing within the Workflow.
 - i. Once you have corrected any errors, click on 'Save' and you will get a message: 'Saved OK' Job Description Saved. Click on 'OK'.
 - 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 modal window titled "Approve Workflow Step" with a close button (X) in the top right corner. At the top, there is a visual representation of a workflow: a box labeled "My Step" with "Laura Pew" below it, connected by a line to a box labeled "Pending Next Step" with "Sean Mahaffey" below it. Below this, there are two main sections. The first section is titled "Send e-mail to the next step approver(s): Sean Mahaffey" and has a checked checkbox. It includes links for "Preview E-mail" and "Edit Template Step Acceptance - Message to next approver", and a text input field 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 Step Acceptance - On Accept Courtesy to other participants", and a text input field labeled "Add Comment". At the bottom, there is a section for "Courtesy E-mail CC" with a text input field and a note "Separate e-mail addresses with comma". A blue "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 workflow diagram with two steps: 'Return to Step' (Unit Hr User10) and 'My Step' (Laura Pew). Below the diagram is a dropdown menu for 'Workflow Initiator (1)'. There are two sections for sending emails: one for the previous step approver (Unit Hr User10) and one for other participants. Each section has a checkbox, a preview link, and a comment field. A 'Return Step' button is at the bottom right.

- 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.

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