

JOB BUILDER

JDXpert User Guide

UC Berkeley People & Culture

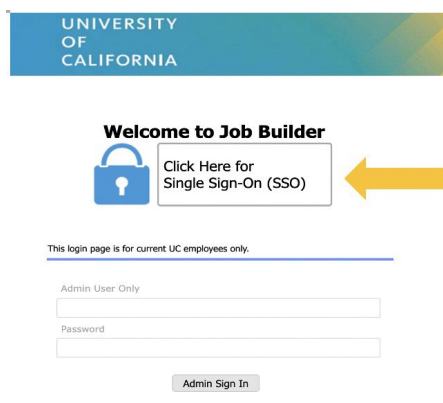
compdesk@berkeley.edu

JDX URL: <https://universityofcalifornia.marketpayjobs.com/>

*Note: This User Guide is being updated monthly during implementation of this new system.
Please continue to visit the P&C website for the most updated version.*

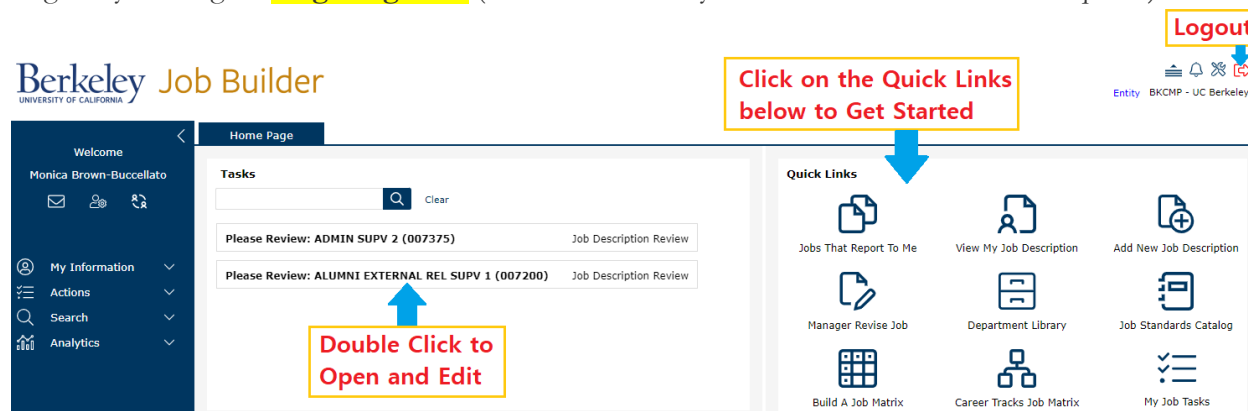
Job Builder (JDXpert)

Updated [20-minute video](#)



- Tool for managers to use when writing staff (PPSM & Represented) job descriptions.
- Provides access to UC Career Tracks Job Standards for employees to plan and track their job growth.
- Acts as a repository for all staff (i.e. non-student & non-academic) job descriptions.
- Uses various workflows that route to the Manager for initial editing, HR Partner for review and revisions, and to the Compensation Analyst for Classification evaluation.

Log-in by clicking on **Single Sign-On** (Select UC Berkeley + CalNet Authentication is required).














- To begin creating a new job description (JD) select **Add New Job Description** (then **Select Base Job** to choose the job title you want)
 - Every JD in JDX must have a Workflow started to save and edit in the system. Use the **Formal Classification Review, 3-step workflow**.
 - Tip: Add yourself to Step 1, search participant list by Last Name,First Initial (without a space)
- (Managers/Supervisors) Open the **Jobs That Report to Me** OR **Department Library** Quick Link
 - Find the JD using the search menu, click once to select the JD, and select **Workflows** to **Start Workflow**.
- (Managers/Supervisors) To view job descriptions of your Direct Reports select **Jobs That Report to Me**.
 - To find JDs without a Position Number or positions that are currently vacant, open the **Department Library** Quick Link.
- (HR Partners) To find a job description, open the **HR Library** Quick Link.
 - To initiate updating an existing description use the search menu to find the JD, click to select the JD, and select **Workflows** to **Start Express Workflow**.
- To search and find a Job Standard open the **Job Standard Catalog** or **Career Tracks Job Matrix**.
Questions? Email UCB's Compensation team at compdesk@berkeley.edu or join a virtual [drop-in session](#)

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Quick Links

Quick Link:	Description:	Used by:
 Job Standards Catalog	Allows users to search and view specific UC Job Standards. (Includes information such as Job Code, Title, Generic Scope, Custom Scope, Key Responsibilities, Salary Structure and more).	All users
 Career Tracks Job Matrix	View Career Tracks Job Standards by a specific Job Function in side-by-side view.	All users
 Build A Job Matrix	Customize and create a unique Job Matrix for various job titles (can be used to compare different job functions and levels).	All users
 Jobs That Report To Me	<p>View Job Descriptions of your Direct and Indirect Reports. You can also begin a Workflow to start editing a JD in this list. Every Job Description in Job Builder must have a Workflow started to save and edit in the system.</p> <p>*Note: if your JD shows as “DEFAULT Conversion – JOB STANDARD ONLY” then your manager will need to update the JD in JDX before this is considered your actual job description.</p>	Users with one or more Direct Reports (i.e. Managers and Supervisors)
 Manager Revise Job	Allows users with one or more Direct Reports to revise an existing job description in their unit. This can be used for updating encumbered job descriptions but should not be used for Reclassification Requests.	Users with one or more Direct Reports (i.e. Managers and Supervisors)
 Department Library	<p>Allows Managers and Supervisors to find and view Job Descriptions across their own Department (specifically helpful when a JD doesn't have a Position Number and/or an Active Employee in the job). You also can begin a Workflow to start editing a JD. Every Job Description in Job Builder must have a Workflow started to save and edit in the system.</p> <p>If you need access to additional departments, please email compdesk@berkeley.edu.</p>	Users with one or more Direct Reports (i.e. Managers and Supervisors)

 Add New Job Description	Allows users to create new job descriptions and/or submit Reclassification Requests. Use Select Base Job to find the desired JD template. When using this quick link, select the Formal Classification Review 3-step workflow. Note: Every Job Description in Job Builder must have a Workflow started to save and edit in the system.	All users
 HR Library	Allows HR Staff to find and view job descriptions across campus. You can also begin a Workflow to start editing a JD in this list. Every Job Description in Job Builder must have a Workflow started to save and edit in the system. Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email compdesk@berkeley.edu . *This Quick Link is being updated to filter by Departments in each Region	HR Partners
 HR Revise JDs	Allows HR Partners to initiate a workflow for job descriptions across campus that may need to be revised and/or updated. Every Job Description in Job Builder must have a Workflow started to save and edit in the system. Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email compdesk@berkeley.edu . *This Quick Link is being updated to filter by Departments in each Region	HR Partners
 View My Job Description	View your own job description in the system. Note: if your JD shows as “DEFAULT Conversion – JOB STANDARD ONLY” then your manager will need to update the JD in JDX before this is considered your actual job description	All users
 My Job Tasks	Allows you to view all the active workflows that you are a part of. This Quick Link will not show in your view if you do not have any active JDs in workflow that you are a part of. You can also view the workflow details using this quick link.	All users that are part of a workflow

Job Standards Catalog



- ▶ The catalog lists all the UC Job Standards available in JDXpert.
- ▶ Each Job Standard includes information such as Job Code, Job Title, Job Family and Function Descriptions, Generic Scope, Custom Scope, Key Responsibilities, Salary Structure and more.

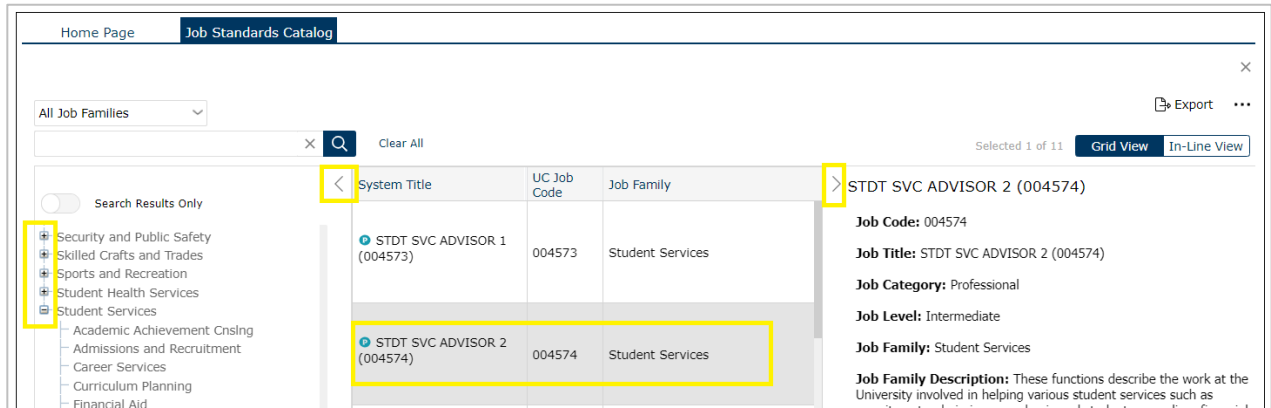


Figure 1

To Search for Job Standard by Job Family

- Start by selecting a Job Family by either:
 - The drop-down menu labeled “All Job Families.” This gives a full list of the UC Job Families.
 - Use the **carrot (<)** located to the left of System Title. (Figure 1)
 - Displays a drop-down list of all Job Families and specific Job Functions.
- Click to select the **Job Title** you would like to view (see shaded grey STDT SVC ADVISOR 2).
- On the far-right panel, you can view the **Job Standard**.
- Use the scroll bar on the bottom to scroll from left to right to see additional information including **if the title is extended to UCB**.

Job Category	Salary Structure	Job Function Description	Job Family Description	Education	Extended to UCB
Operational and Technical	Grade 17	Responsible for operations aboard a seagoing vessel or lab engaged in oceanographic research, including some or all of the	These functions exist primarily to support marine research such as provided by the Scripps Institute of Oceanography at UC San Diego.	High school diploma and / or equivalent certification / experience / training	No
Professional	Grade 42	Involves the professional management of the Absolute Returns asset class in order to meet specified investment goals for the benefit of	These functions describe the work involved with safeguarding and maintaining the University's portfolio of assets on behalf of the	Bachelor's degree in related area and / or equivalent experience / training	No
Professional	Grade 43	Involves the professional management of the Absolute Returns asset class in order to meet specified investment goals for the benefit of	These functions describe the work involved with safeguarding and maintaining the University's portfolio of assets on behalf of the	Bachelor's degree in related area and / or equivalent experience / training Advanced degree and / or working toward a professional MBA / CFA and 8 or	No

Scroll to the far right

Figure 2

Printing a Single Job Standard

1. The Job Standards Catalog defaults to **Grid View** as shown in Figure 3. Select a Job Title you would like to view

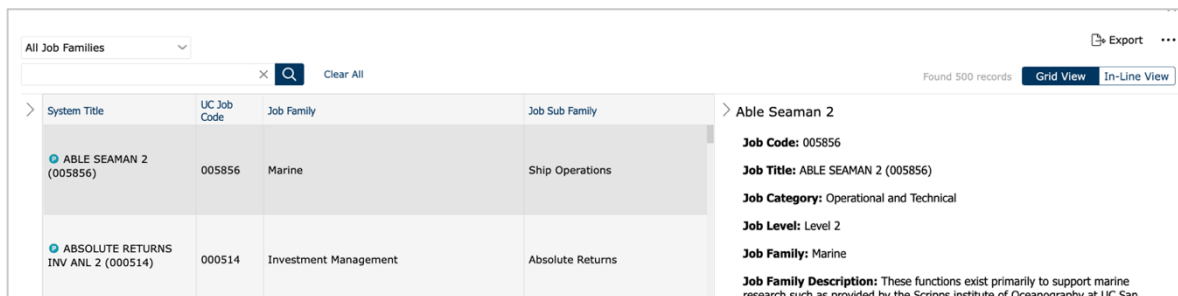


Figure 3

2. Change the view to **In-Line View**. (Figure 4)
3. Click on the Job Title. (Figure 4)



Figure 4

5. This will open the print preview page. Here, you can download the job standard as a Word file or a PDF by clicking on the respective buttons. (Figure 5)

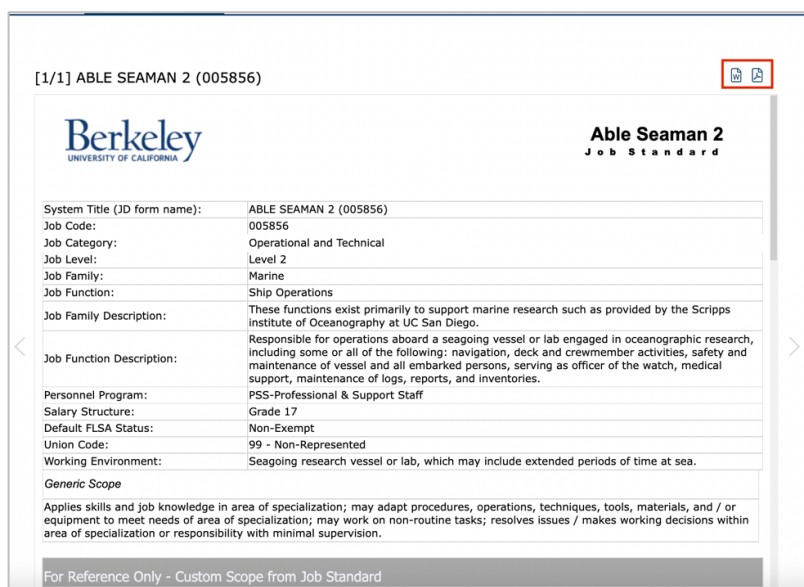


Figure 5

Career Tracks Job Matrix



- ▶ View Career Tracks Job Standards in Side-by-Side view.
- ▶ Allows for comparison between Job Titles across a Job Function.

View Career Tracks Side-by-Side

1. Click (Figure 6) to select Job Function.
2. The icon will show a list of all the Job Families.
3. Click the “ ” icon on the left to show specific Job Functions listed under each Job Family.
4. Select the Job Function that you would like and click **Select and Close**
5. You can then either:
 - a. Click **View Side-By-Side**
 - i. Displays all Job Standards across a Job Function. (Figure 6)
 - b. Click **Download Job Standards**
 - i. Downloads **all** Job Titles in a Job Function into an Excel File which will allow you to print. See also 6b for more information. (Figure 6)

Figure 6

	Communications Health Care Manager 4 X	Communications Manager 1 X	Communications Manager 2 X	Communications Manager 3 X
Date Last Edited	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM
System Title	COMM HC MGR 4 (005598)	COMM MGR 1 (000408)	COMM MGR 2 (000409)	COMM MGR 3 (000410)
Is Title Extended to UCB	No	Yes	Yes	Yes
Job Code	005598	000408	000409	000410
UC Payroll Title	COMM HC MGR 4 (005598)	COMM MGR 1 (000408)	COMM MGR 2 (000409)	COMM MGR 3 (000410)
Job Category	Supervisory and Management	Supervisory and Management	Supervisory and Management	Supervisory and Management
Job Level	Manager 4	Manager 1	Manager 2	Manager 3
Job Family	Job Family: Communications Sub-Family: General Communications These functions describe the various modes of communication used at the University and by various components of the University.	Job Family: Communications Sub-Family: General Communications These functions describe the various modes of communication used at the University and by various components of the University.	Job Family: Communications Sub-Family: General Communications These functions describe the various modes of communication used at the University and by various components of the University.	Job Family: Communications Sub-Family: General Communications These functions describe the various modes of communication used at the University and by various components of the University.
Job Function Description	Involves developing, implementing or executing a comprehensive, multidisciplinary communications program; involves work in two or more communications disciplines OR work not otherwise covered in other	Involves developing, implementing or executing a comprehensive, multidisciplinary communications program; involves work in two or more communications disciplines OR work not otherwise covered in other	Involves developing, implementing or executing a comprehensive, multidisciplinary communications program; involves work in two or more communications disciplines OR work not otherwise covered in other	Involves developing, implementing or executing a comprehensive, multidisciplinary communications program; involves work in two or more communications disciplines OR work not otherwise covered in other
Environment		Campus, medical center or other university setting and various external	Campus, medical center or other university setting and various external	Campus, medical center or other university setting and various external

Figure 7


6. After you click **View Side-By-Side** you can:
 - a. **Reset** resets the Career Tracks Job Matrix.
 - b. **Export as Excel** downloads an Excel file that displays information about selected Job Titles. (Figure 7)
 - i. *Note, you can “x” Job Titles you wish to deselect and then click Export as Excel. This allows you to select individual Job Titles that you wish to download.
 - c. **Highlight Differences:** marks the differences between Job Standards.
 - d. **Hide Identical Rows:** hides the rows that share the same information across different Job Standards.
 - e. **Is Title Extended to UCB:** indicates “Yes” if this title is extended and “No” if not. (Figure 7)

Build a Job Matrix



- Ability to view UC Job Titles and allows for comparison between multiple Job Standards within various Job Families and Functions.
- This is a valuable resource for HR Partners to utilize when comparing Job Standards before making a recommendation to the Department/Manager on which Job Title to use when creating a new position.

To Search for Job Families, you can either:

- Use the Filter function next to the search bar (Figure 8).
 - Click Filter by Job Family and Select a Value.
 - Select your desired Job Family.
- Use the carrot (>) on the left side of the screen (Figure 8, carrot is located to the left of Ambulatory Care Clinics..).
 - Displays a drop-down list of all Job Families.
 - Click  to display additional Job Functions under each Job Family.
- Hover your cursor on either the left or right arrows on top of the screen to scroll through the Job Families. The "<" arrow can be seen to the left of Ambulatory Care while the ">" can be seen to the right of Cardiovascular Services

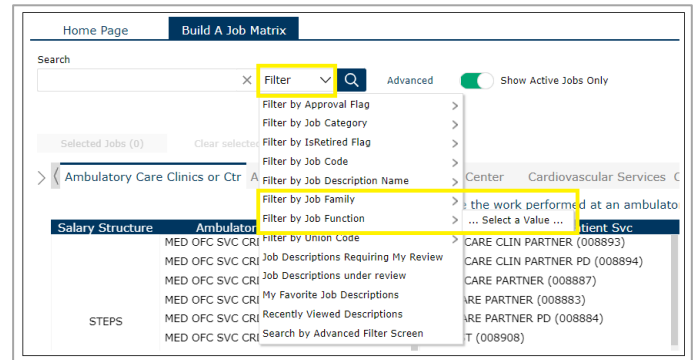


Figure 8

General Steps for Building a Job Matrix

- After Searching for a Job Family, select various Job Titles listed in the grey rows to create a customized Job Matrix. You can select multiple Job Standards by holding Ctrl/Cmd when selecting.
 - *Note: Job Standards with a STEPS Salary Structure are represented jobs
- Click on **Selected Jobs** to view the Job Standards and compare. (Figure 9)
- Once you've selected the job titles you want to compare, Click **Side-By-Side**

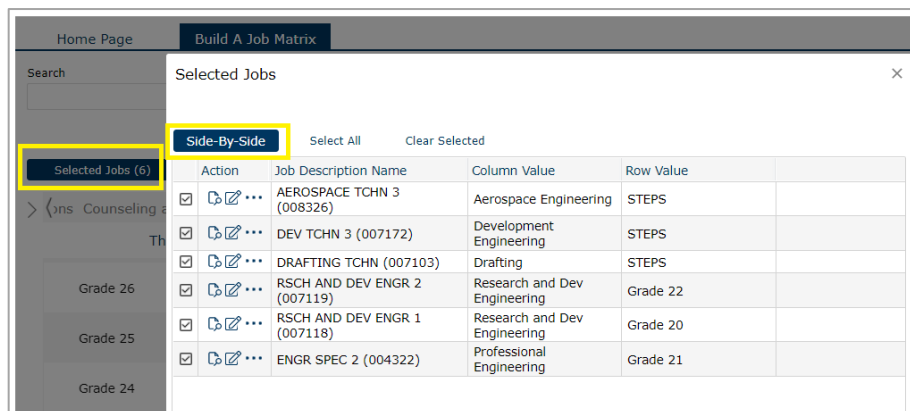


Figure 9

Side-by-Side View

- The Side-by-Side view shows a comparison chart between the selected job standards. You can also click “x” to deselect any Job Standards you wish to delete. (Figure 10)
 - **Reset** resets the matrix and the jobs selected.
 - **Export as Excel** downloads the Job Standards selected as an Excel sheet.
 - By checking **Highlight Differences**, the system will mark the differences between the job standards in yellow.
 - By checking **Hide Identical Rows**, it will hide the similarities in the job standards and display the unique characteristics.

Side-By-Side View

Reset

Export as Excel

Edit Profiles

Selected Jobs

6 Jobs Selected

Side-by-Side Profile

Career Ladder

☐ Highlight Differences
 ☐ Hide Identical Rows

	AEROSPACE TCHN 3 (008326) ×	DEV TCHN 3 (007172) ×	DRAFTING TCHN (007103) ×
Date Last Edited	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM
System Title	AEROSPACE TCHN 3 (008326)	DEV TCHN 3 (007172)	DRAFTING TCHN (007103)
Job Code	008326	007172	007103
UC Payroll Title			
Job Category	Not Leveled	Not Leveled	Not Leveled
Job Level	No Level	No Level	No Level
Job Family	Job Family: Engineering Sub-Family: Aerospace Engineering	Job Family: Engineering Sub-Family: Development Engineering	Job Family: Engineering Sub-Family: Drafting
Job Family Description	These functions describe the various types of engineering at the University from professionally licensed engineers, development engineers, and drafters.	These functions describe the various types of engineering at the University from professionally licensed engineers, development engineers, and drafters.	These functions describe the various types of engineering at the University from professionally licensed engineers, development engineers, and drafters.

Figure 10

Jobs that Report to Me



- View Job Descriptions of your Direct and Indirect Reports that report to you.

Jobs under this Quick Link only appear if the correct position number is included on the Job Description template in JDX AND is a filled position.

- Easily revise and edit a job description through this Quick Link (click & select the JD, click “Workflows”, and Start Express Workflow).
- NOTE:** For **Classified** JDs you can use the Minor Update to JD 1-Step workflow. For **DEFAULT JDS or JDs without a Status**, you should use the Formal Classification Review 3-Step workflow when writing the description for the purposes of recruitment.

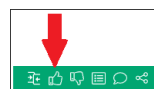
Action	Job Description Name	Status of Position Descri	Position Number
	JD---70000		DEFAULT
	JD-FMHUM-007394-23023	DEFAULT Conversion - JOB STANDARD ONLY	40151006
	JD-FMHUM-007583-16479	Classified	40170014
	JD-FWHHS-000333-16596	Classified	40149704
	JD-FWHHS-000562-15478	Classified	40192124
	JD-FWHHS-000562-16591	Classified	40144719
	JD-FWHHS-000562-16593	Classified	40159641

Figure 11

- Side-By-Side** Use the Shift key to select and highlight multiple JDs. The Side-by-Side view shows a comparison chart between the selected JDs. See more information on **page 8**.
- Actions:
 - View:** allows you to view the Job Template, not editable.
 - Employees:** view the employees that encumbers this job.
 - Set as favorite:** when favorited, it allows for the ability to “Filter by My Favorites” which may help locate these JDs faster.

To Revise a Job Description

- Click & select the job that you would like to revise (highlights the job row in grey).
- Click on **Workflow** and **Start Workflow**. Choose between the different workflows. There is additional information available in the [Workflows section](#) of this User Guide.
- Select participants and click Start Workflow. **Remember to include yourself in the first step if you want to Edit the JD immediately.**
 - Tip: search for participants by last name, first initial with no space. (ex: Doe, J) Note: select the “Primary Record” for all participants that are a part of workflow
- Click **Start Workflow** The Job Description Review task will appear in the Task Bar on the home page for each participant.
- Double click on the JD** under Tasks on the Home Page to start editing the JD. Remember to click **Save** on the bottom to save your progress.
- Approve your step by clicking on the **Thumbs Up icon** in the green banner to move it to the next step in workflow or to Finalize the Workflow.



- You can view the progress of this workflow through the “My Job Tasks” Quick Link.

Manager Revise Job



- Allows Managers & Supervisors (anyone with a Direct Report) to revise an existing job description. This can be used for updating existing job descriptions but should not be used for Reclassification Requests.
- This Quick Link is particularly helpful to find and edit JDs that do not have a Position Number or include a Position Number that does not have an Active Employee in the job.

Figure 12

Figure 13

To Revise a Job

- Click **Add Job**
- Check the boxes on the left for the jobs that you would like to revise. (Figure 12)
 - You can use the Search Bar to search by Job ID, Position Number, Form Name, etc.
- Select the job you'd like to revise. Then click **Select and Close**
 - The pop-up screen will display the selected job along with some functions. (Figure 13)
 - Actions:
 - View Job:** allows you to view the Job Template, not editable.
 - Delete:** allows you to remove Job Description from the revised list.
- Select between the Workflows from the drop-down options, more info in the [Workflows section](#). Add appropriate participants to each step of the workflow. **Remember to include yourself in the first step if you want to Edit the JD immediately.**
 - Tip: search for participants by last name, first initial with no space. (ex: Doe, J)** Note: select the "Primary Record" for all participants that are a part of workflow
- Click **Start Workflow** the Job Description Review task will then appear in the Task Bar on the home page for each participant.
- Double click on the JD** to begin revising the Job Description. Remember to click **Save** on the bottom to save your progress.
- Approve your step by clicking on the **thumbs-up icon** in the green banner to move it to the next step in workflow.



- You can view the progress of this workflow through the "My Job Tasks" Quick Link.

Department Library



- ▶ This allows users (Managers/Supervisors) to search a department-wide Job Description Library using text search and quick filters. [Direct Manager User Role & User Role 2]
- ▶ Use this quick link to find JDs that are missing Position Numbers. **JDs not found in your Jobs that Report to Me will be visible here.**


Action	ID	Position Number	UC Payroll Title:	Job Code	System Title
	120467	40190528	LABOR REL MGR 2 (000494)	494	JD-FMHUM-000494-25965
	120469	40152848	LABOR REL REPR 4 (000495)	495	JD-FMHUM-000495-25429
	120470	40192125	LABOR REL REPR 4 (000495)	495	JD-FMHUM-000495-25730
	120471	40152848	LABOR REL REPR 4 (000495)	495	JD-FMHUM-000495-26345
	120472	40152848	LABOR REL REPR 4 (000495)	495	JD-FMHUM-000495-26493
	120473	40146785	EMPLOYEE REL REPR 4 (000497)	497	JD-FMHUM-000497-22068
	120474	40152087	EMPLOYEE REL REPR 4 (000497)	497	JD-FMHUM-000497-23060
	120475	40154574	EMPLOYEE REL REPR 4 (000497)	497	JD-FMHUM-000497-25675
	120476	40190528	EMPLOYEE REL REPR 4 (000497)	497	JD-FMHUM-000497-25965

Figure 14



1. This Quick Link automatically has “Recently Viewed Descriptions” checked. Uncheck “Recently Viewed Descriptions” (select the red “x” to Remove Filter) to view all JDs available in your department.
 - If you need access to additional departments, email the request to compdesk@berkeley.edu.
 2. The system title is the same PD Form Name in the Old Job Builder. JDX does not include the Version Number in the form name.
 3. If the “**Status of Position Description**” indicates “**DEFAULT Conversion – JOB STANDARD ONLY**” then the manager of the position may need to update Job Builder/JDX with the actual Job Description information before the employee can view in the JDX platform. **Refer to “Make Updates to a Job Description.”**
- **Actions:**
 - **Set as favorite:** when favorited, it allows for the ability to “Filter by My Favorites” which may help locate these JDs faster.
 - Select a Job, on the right panel (click the carrot icon), there will be:
 - **Preview:** allows you to see the print version of the JD. You can download as Word/PDF.
 - **Employees:** allows you to see employees assigned to the JD.

TIP:
Uncheck the automatic filter “Recently Viewed Job Descriptions” to see a full search

How to Download JD as Word/PDF:

1. From the Department Library, select a JD. Click on the Preview icon . This will open the print version of the JD on the right. (Figure 15)
2. Although there are 4 ways to download a JD, **Word and PDF** are the best options.

Click on either icon to:

-  ➤ Download as Word
-  ➤ Download as PDF

3. Afterwards, there will be a confirmation screen pop-up. Click **Download File(s)**.

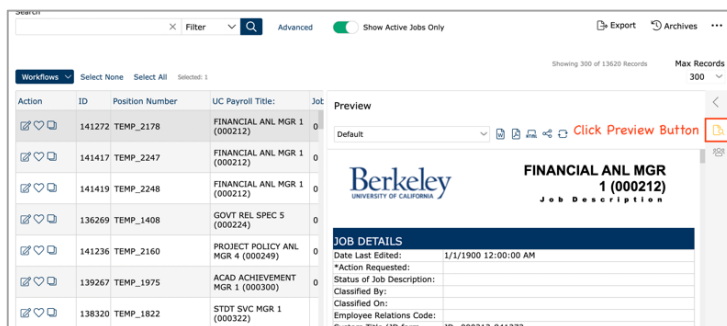
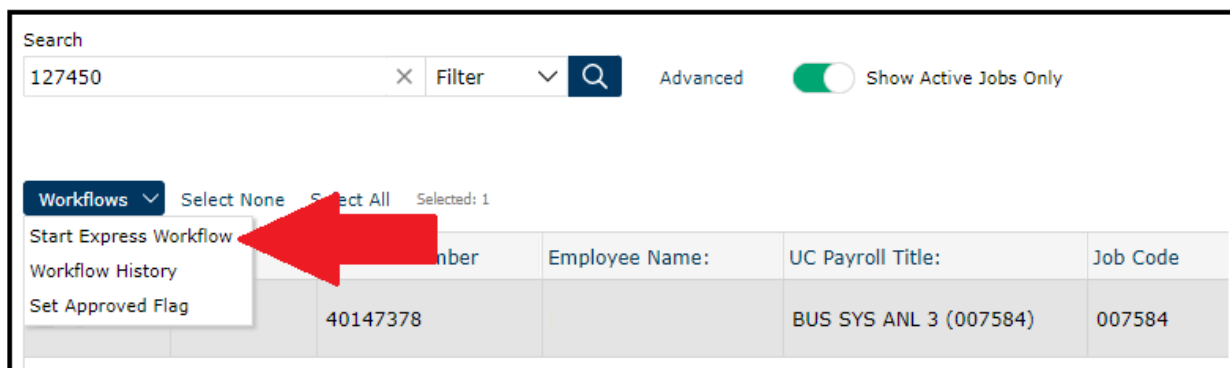


Figure 15

Make Updates to a Job Description

1. Click & select the job that you would like to revise (highlights the job row in grey). (Figure 15)
2. Click on the **Workflows** button and **Start Express Workflow**.
3. Select between the Workflows from the drop-down options, more info in the [Workflows section](#). Add appropriate participants to each step of the workflow. Remember to include yourself in the first step if you want to Edit the JD immediately.
 - **Tip:** search for participants by last name, first initial with no space. (ex: Doe,J) **Note:** select the "Primary Record" for all participants that are a part of workflow



4. Click **Start Workflow**, then "x" out of the pop up window which is simply confirmation that the workflow was started. The Job Description Review task will appear in the Task Bar on the home page for each participant.
5. **Double click on the JD** under **Tasks on the Home Page** to start editing the JD. Remember to click **Save** on the bottom to save your progress.
6. Approve your step by clicking on the **Thumbs Up icon** in the **green toolbar/banner** to move it to the next step in workflow.



- a. You can view the progress of this workflow through the "My Job Tasks" Quick Link.

Add New Job Description



- ▶ This quick link allows you to create a new job description or submit reclassification requests.
- ▶ JDXpert offers the Search Library function that can be found throughout different sections when editing & customizing a job description. These job descriptions can be saved in the system and be retrieved later.

Figure 16

[Step-by-step instructions for adding a new JD and/or starting a reclassification.](#)

Add a New Job Description

1. Select Base Job → which is the Job Title/Job Code you want to use for the JD.
2. Search by the job code or job title, click the title once, then **Select and Close**
3. Next, Select the Workflow from the drop-down menu. More information in the [Workflows section](#).

Figure 17: Add a New Job Description

4. Choose the **Formal Classification Review** workflow if unsure of which workflow to choose
 - a. Add yourself to Step 1 and any others in your unit that need to review/edit the JD.
 - b. Add your HR Partner to Step 2.
 - c. Lastly, add your Comp Consultant to Step 3.
5. Click on **Start Workflow**, then click on the "x" to close the next screen that displays the workflow that was started.
6. The job description will then appear on your Home Page in JDX under Tasks
 Double click on the JD name to open it up and edit. Remember to hit **Save on the bottom** to save your progress.

TIP:
Search by Last name, First initial with no spaces (ex: Doe,J)

7. Make edits to the job description template, **Save and Close** when you're done making edits.
 - a. You can return to the JD and continue making edits.
 - b. Once all edits are complete, hit **save on the bottom**, and then select the **Thumbs Up** icon in the green toolbar to approve the JD to the next step of workflow (i.e. in this case it would route to the HR Partner as the HR reviewer).
8. You can view the progress of this workflow through the “My Job Tasks” Quick Link.

Content Search

- ▶ When you are actively editing the Key Responsibilities and Knowledge, Skills, and Abilities (KSAs) sections of the JD, you can use the function called “Content Search.” This can be found in the toolbar under the KSAs section. Content Search can be used to provide relevant existing information in the database that can be applied to the blank job description template.
 - This feature uses Artificial Intelligence. It is available in certain sections when editing a Job Description.
 - Used to provide relevant existing information in the database that can be applied to JD.

Content Search Options via Smart/Detailed/Specific Search

Under the selected JD, there will be related Job Functions that will pop up as suggestions

1. **Smart Search:** returns individual job characteristics across selected Job Family (Fig. 13)
 - a. The Search Bar will auto-populate by Job Title. The bottom of the search bar is suggested JDX jobs similar to the job standard you selected previously.
 - b. Ability to select multiple descriptions that match your job.
 - c. A special feature is the ability to click on “More Like This” which gives similar variations of the KSAs.
2. **Detailed Search:** categorizes job characteristics by individual Job Functions and Key Responsibilities. (Figure 18)
 - a. Left side: displays suggested Job Functions that match your selected Job Family. The jobs under the search bar will now be shown on the left-hand side of the screen.
 - b. Right side: KSA’s for selected Job Function pop-up on the right
- You can switch between the two by clicking the button on the right labeled with these Names. (Figure 18/19)
3. When you are finished highlighting all the descriptions that you like, click **Add to Job** on the bottom right.

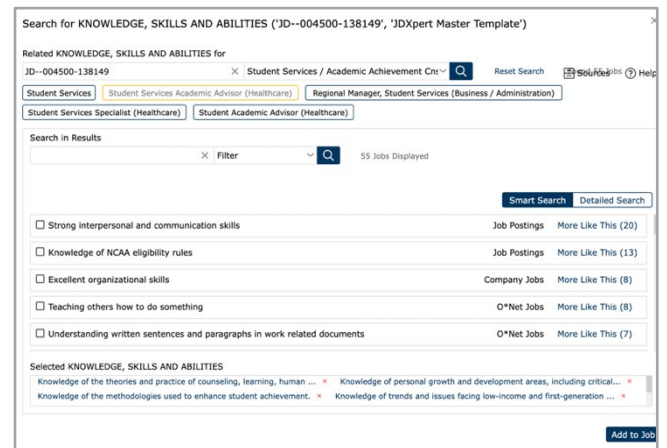


Figure 18: Smart Search

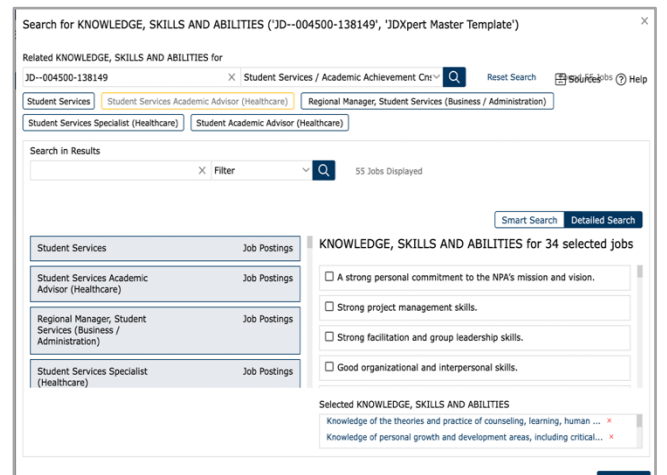


Figure 19: Detailed Search

Reclassification Request

- ▶ You can request a reclass of a job description directly in JDX through the **Add a New Job Description quick link**
- ▶ **When starting a reclassification request, use the proposed title, not the current title**
- ▶ Reclassification requests, if approved, are effective the first day of the month following receipt of all the required documents (old/original job description, new/updated position description, old/original org chart, and new/proposed organizational chart) by the Compensation unit.

Requesting a Reclassification

1. Start from the “Add a New Job Description” quick link. Then select **Base Job**.
2. Search by the **proposed job code or job title**, click the title once, then **Select and Close**
3. Next, **Select the Workflow** from the drop-down menu. More information in the [Workflows section](#).

Figure 20

4. Choose the **Formal Classification Review** workflow if unsure of which workflow to choose
 - a. Add yourself to Step 1 and any others in your unit that need to review/edit the JD.
 - b. Add your HR Partner to Step 2.
 - c. Lastly, add your Comp Consultant to Step 3.
5. Click on **Start Workflow**, then click on the "x" to close the next screen that displays the workflow that was started.
6. The job description will then appear on your Home Page in JDX under Tasks **Double click** on the JD name to open it up and edit. Remember to hit **Save on the bottom**.

TIP:

1. Search by Last name, First initial with no spaces (ex: Doe,J)
2. Add yourself to first step

Editing Reclassification JD

1. When editing the JD, **the Action Requested field should indicate “Reclassification”**.
 - Click on the carrot icon in Action Requested field to reveal a drop-down menu
 - Select “Reclassification” as seen in Figure 21

Figure 21

2. This will open the Reclassification section of the JD template which is required to be completed for all Reclassification Requests. This additional section can be found in the left column that lists all sections in the JD template as seen in Figure 22.

Figure 22

Reclassification Section

This page is **REQUIRED** for all Reclassification Requests

1. Reclassification Request Questionnaire (This section replaces the "Cover Page" document.)
2. Describe the significant changes that have taken place to the **position** since the position was last reviewed
 - This section should speak about the position not the incumbent. Do not use he/she/him/her/they or the incumbents name in this section.
 - Explain how these new duties evolved. For instance, are they new to the department? Were they previously done by another employee? Are they an expansion of the employee's current duties? Have duties been removed or redelegated?
3. Describe where the additional duties came from.
 - This section should speak about the **position** not the incumbent. Do not use he/she/him/her/they or the incumbents name in this section.
4. When did the position assume the additional duties?
 - This section should speak about the **position** not the incumbent. Do not use he/she/him/her/they or the incumbents name in this section.
5. If there is more than one incumbent in the current payroll title in the department, summarize why this position was chosen to be assigned the additional duties.
 - A recruitment may be required.

Select Yes/No for the following 4 questions:

1. Is the work outlined in the updated position description on-going and permanent?
2. Does the department anticipate backfilling the current level position?
3. Is this position currently represented by a bargaining unit?
4. Has any portion of the job duties been previously performed by a position in a bargaining unit?

Attachments:

Upload the following **required documents**:

1. Old/Original Org Chart
2. Old/Original Job Description
3. New/Proposed Org Chart

Toolbar Functionalities in JD Template

- ▶ The “Paste List” function can be useful when you input content from a separate file (such as Word) into JDx.

Top Toolbar



1. **Add:** allows you to add another row. You can also click on “Add New Row” located on the bottom.
2. **Delete Row:** select a row, then click “Delete Row” in the toolbar to delete the selected row.
3. **Move Up Row:** select a row, then click “Move Up Row” in the toolbar to move the row up one row.
4. **Move Down Row:** select a row, then click “Move Down Row” in the toolbar to move the row down one row.
5. **Paste List:** click on “Paste List” to open Text Editor. (Figure 23)
 - Text Editor allows you to copy/paste text from a separate document, such as a Word doc.
 - A line break is identified by a capital letter that starts a new sentence. (Figure 23)
 - Toggle the Line Break Character drop down to format the Count before selecting Save and Close.
6. **Content Search:** can be used to provide relevant existing information in the database that can be applied to the blank job description template.

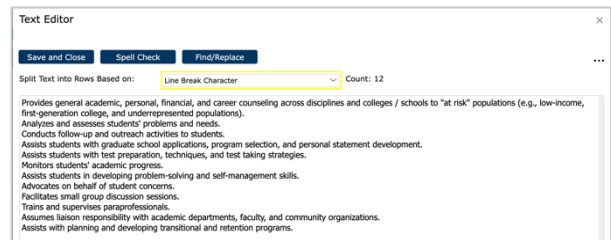


Figure 23 Paste List

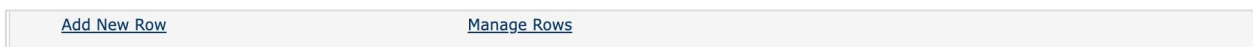
Duties should listed in order of greatest importance. Other responsibilities may be assigned.
*Key Responsibilities
Provides general academic, personal, financial, and career counseling across disciplines and colleges / schools to "at risk" populations (e.g., low-income, first-generation college, and underrepresented populations).
Analyzes and assesses students' problems and needs.
Conducts follow-up and outreach activities to students.
Assists students with graduate school applications, program selection, and personal statement development.

Figure 24 Paste List Translation to Key Responsibilities

There are two options to search by:

1. **Smart Search:** returns individual job characteristics across selected Job Family.
 2. **Detailed Search:** categorizes job characteristics by individual Job Functions and Key Responsibilities.
- Select the descriptions you'd like to add to the JD. Click on **Add to Job** when you are finished selecting the descriptions to finalize your selection.

Bottom Toolbar



7. **Add New Row:** equal functionality to the “Add” button in the toolbar
8. **Manage Rows:** gives additional functionalities that you can apply to your descriptions
 - **Format Text(Bold, Italic, Underline):** allows you to format selected row with these three options. If you'd like to remove formatting, click on Manage Rows then Format Text again.
 - **Indent Row:** allows you to indent the selected row
 - **Delete all Rows:** deletes all rows. You can undo this action by closing the form without saving.
 - **Find/Replace all Text:** finds and replaces all text in selected row

Paste List

- ▶ This toolbar is available in various sections in the job template, including the Key Responsibilities and KSAs section.
- ▶ If you are pasting a lot of information, let's say from an existing Word doc, to the current job template, the “Paste List” feature comes in handy.
- ▶ There are four methods that the system can use to divide the text with the “Paste List” feature:
 1. **Line Break Character:** breaks text when you hit “Enter” in your keyboard.
 2. **Single Blank Line:** breaks text based on the inclusion of a blank line.
 3. **Double Blank Line:** breaks text based on the inclusion of two blank lines.
 4. **Three asterisks *** (Horizontal Rule):** breaks text when you hit “Enter” and include *** before the text.

TIP:

Line Break Character or Single Blank Line are the easiest methods to use

Guided Example:

In the Key Responsibilities section, click “Paste List” in the toolbar. (Figure 25)



Figure 25

1. This will open up the “Text Editor” pop-up
2. The “**Split Text in Rows Based on:**” is automatically set to “Line Break Character” but you can change this to another method by selecting the drop-down menu. (Figure 26)
3. In the blank text box, paste in the copied information from your existing Word doc.

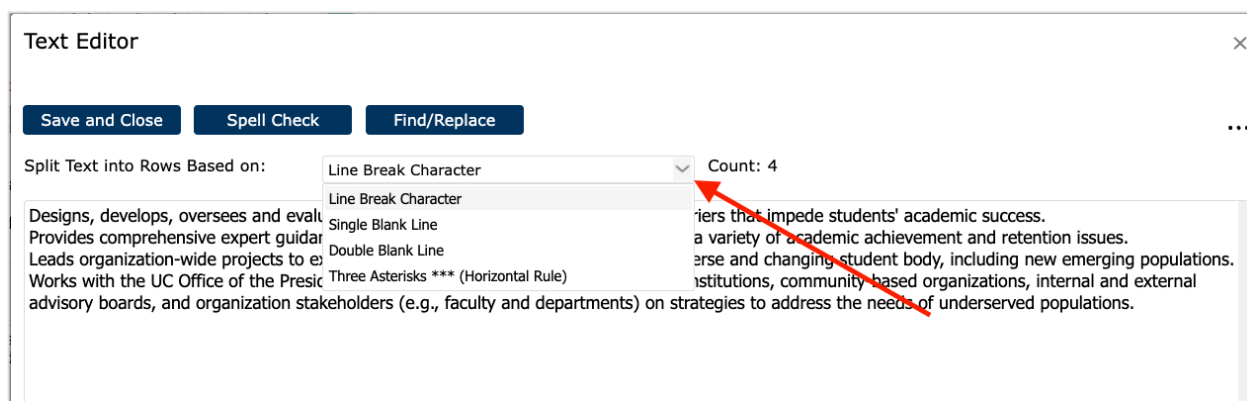


Figure 26

Line Break Character

- A line break is automatically identified by a capital letter that starts each sentence. It can also break text when you hit “Enter” in your keyboard.

Steps:

1. After you paste in the desired text, the system will automatically identify each sentence that starts with a capital letter as it's own Key Responsibility. You can also **press “Enter”** on your keyboard to specify where you want each Key Responsibility to be separated.
2. For instance, if you want to split “Designs.. and Provides..” into two distinct Key Responsibilities, hit “Enter” after the last word “success”.
 - a. This will inform the system that the following sentence (“Provides...”) should be treated as a separate Key Responsibility
3. The **“Count”** lets you know how many individual Key Responsibilities the system has accounted for. (Figure 27)
 - a. As you can see, the system has accounted for four Key Responsibilities (Figure 27):

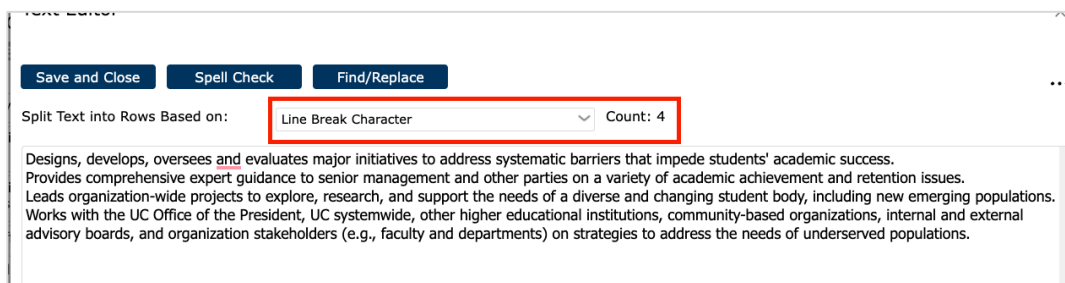


Figure 27: Count

4. This results in four Key Responsibilities:

Key Responsibilities			Total Percentage:20%
Add Delete Move Up Move Down Paste List Search			...
Duties should listed in order of greatest importance. Other responsibilities may be assigned.			
*Key Responsibilities	*Percentage of Time	*Essential/Not Essential	
Designs, develops, oversees and evaluates major initiatives to address systematic barriers that impede students' academic success.	5	Essential	
Provides comprehensive expert guidance to senior management and other parties on a variety of academic achievement and retention issues.	5	Essential	
Leads organization-wide projects to explore, research, and support the needs of a diverse and changing student body, including new emerging populations.	5	Essential	
Works with the UC Office of the President, UC systemwide, other higher educational institutions, community-based organizations, internal and external advisory boards, and organization stakeholders (e.g., faculty and departments) on strategies to address the needs of underserved populations.	5	Essential	

Figure 28: Translation from Text Editor to Key Responsibilities

Single Blank Line

- Breaks text based on the inclusion of a blank line

Steps:

1. After you paste in the desired text, **press “Enter” until there is a blank line** between the Key Responsibilities you’d like to separate
2. For instance, if you want to split “Designs.. and Provides..” into two distinct Key Responsibilities, hit “Enter” after the last word “success” **until you see a blank line.** (indicated by arrow in Figure 30)
 - a. This will inform the system that the following sentence(s) should be treated as a separate Key Responsibility
3. In Figure , the red arrow shows the blank line that divides the two Key Responsibilities
4. The “Count” lets you know how many individual Key Responsibilities the system has accounted for.
 - a. As you can see, the system has accounted for two Key Responsibilities (Figure 30):

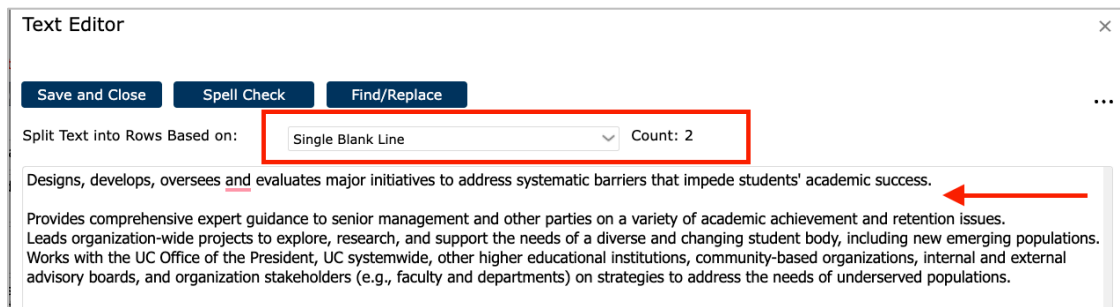


Figure 29: Count

5. This will result in two Key Responsibilities

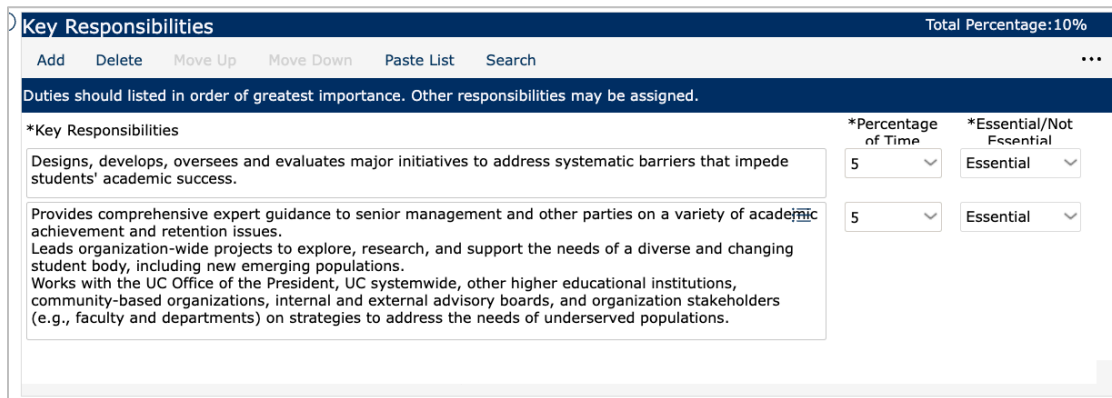


Figure 30: Translation from Text Editor to Key Responsibilities

Double Blank Line

- Breaks text based on the inclusion of two blank lines

Steps:

1. After you paste in the desired text, press “Enter” **until there are two blank lines** between the Key Responsibilities you’d like to separate (indicated by two red arrows in Figure 31)
2. For instance, if you want to split “Designs., Provides., and “Works...” into three distinct Key Responsibilities, hit “Enter” after the last word “success” **until you see two blank lines**. Repeat after the last word “populations.”
 - a. This will inform the system that the following sentence(s) should be treated as a separate Key Responsibility
3. In the image below, the red arrow shows the two blank lines that divides the three Key Responsibilities
4. The “**Count**” lets you know how many individual Key Responsibilities the system has accounted for. (Figure 31)
 - a. As you can see, the system has accounted for three Key Responsibilities (Figure 31):

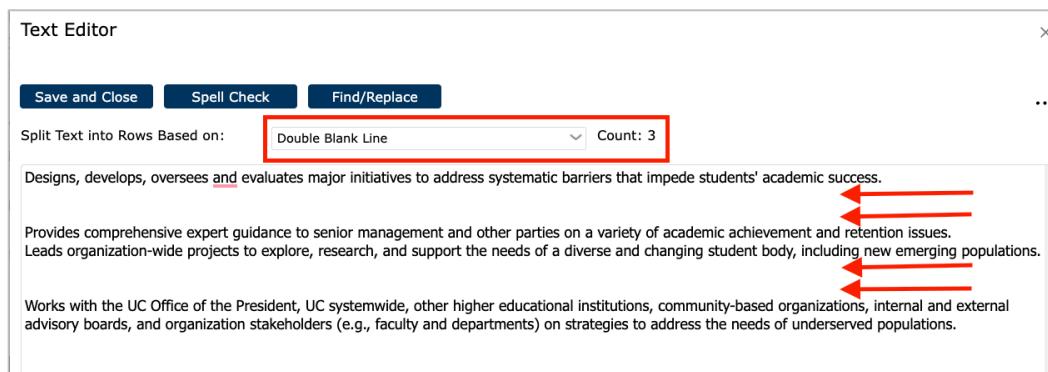


Figure 31: Count

5. This will result in three Key Responsibilities:

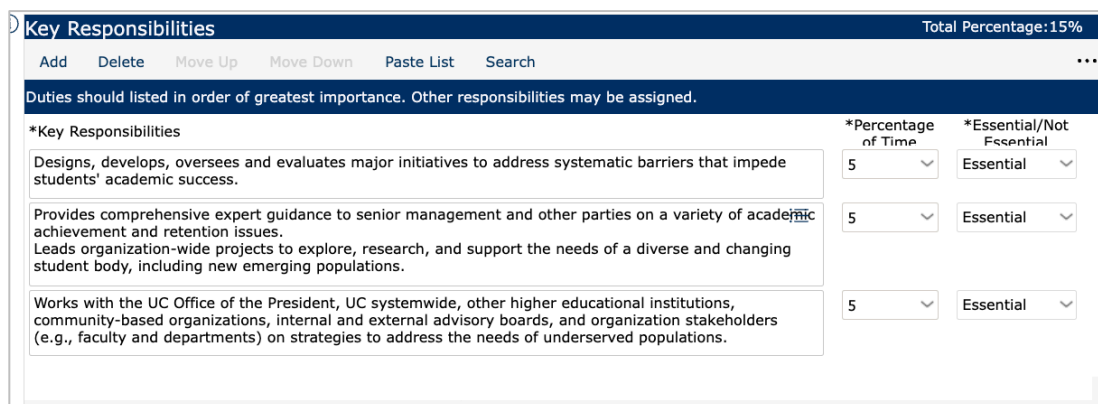


Figure 32: Translation from Text Editor to Key Responsibilities

Editing Key Responsibilities and KSAs

Key Responsibilities

- For Reference Only – Key Responsibilities from CT Job Standard
 - This section auto populates based on the Job Standard that you selected and is non-editable.
 - You can use this as a reference when editing the Key Responsibilities section.

- Key Responsibilities: editable field.

A minimum of 4 Key Responsibilities are required, 15 is the maximum → you will receive a Form Error is there are less than 4 title key responsibilities listed.

- a. **Add:** add additional Key Responsibilities as needed.
- b. **Delete:** select a Key Responsibility and click “Delete” to delete it.
- c. **Move Up:** select a Key Responsibility that you’d like to “Move Up” on the list
- d. **Move Down:** select a Key Responsibility that you’d like to “Move Down” on the list
- e. **Paste List:**

- i. Text Editor: Allows you to copy/paste text from a separate document, such as a Word doc.
- ii. A line break is identified by a capital letter that starts a new sentence. (Figure 34)
- iii. Every line break represents a new row in the Key Responsibilities section. (Figure 34)
- iv. Toggle Line Break Character drop down to adjust the “Count” of lines before selecting Save and Close.

Figure 33: Paste List

Figure 34: How Paste List Translates to Key Responsibilities

- f. Search (Content Search), more info can be found on **page 17**.
 1. Content Search can be used to provide relevant existing information in the database that can be applied to the blank job description template.
 2. There are two options to search by:
 1. **Smart Search:** returns individual job characteristics across selected Job Family.
 2. **Detailed Search:** categorizes job characteristics by individual Job Functions and Key Responsibilities.
 3. Select the Key Responsibilities you’d like to add to the JD. Click on **Add to Job** when you are finished selecting the Key Responsibilities.

Knowledge, Skills, and Abilities (KSAs)

- ▶ For Reference Only – Knowledge, Skills, and Abilities from Job Standard
 - a. This section auto populates based on the Job Standard that you selected and is non-editable.
 - b. You can use this as a reference when editing the KSAs section which will always align with the Job Standard template language for a particular job title/job code.
- ▶ Knowledge, Skills, and Abilities (KSAs): editable field
 - a. **Add:** add additional KSAs as needed.
 - b. **Delete:** select a KSA and click “Delete” to delete it.
 - c. **Move Up:** select a KSA that you’d like to “Move Up” on the list
 - d. **Move Down:** select a KSA that you’d like to “Move Down” on the list
 - e. **Paste List:**
 - Text Editor: Allows you to copy/paste text from a separate document, such as a Word doc.
 - A line break is identified by a capital letter that starts a new sentence. (Figure 35)
 - Every line break represents a new row in the Key Responsibilities section. (Figure 36)
 - Toggle Line Break Character drop down to adjust the “Count” of lines before selecting Save and Close.

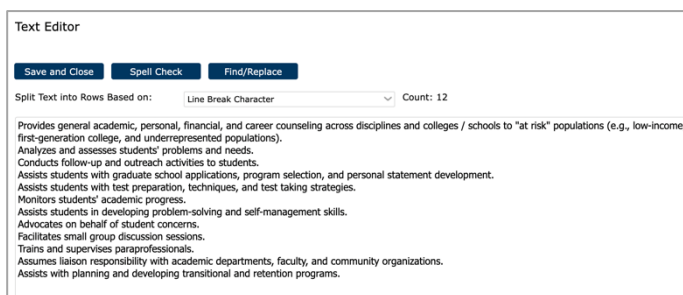


Figure 35: Paste List

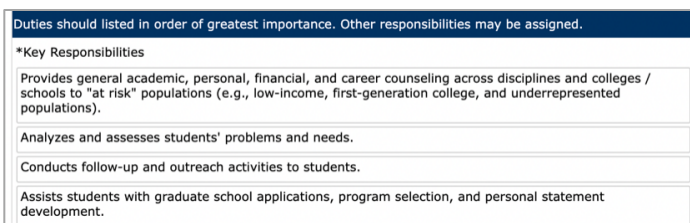


Figure 36: How Paste List Translates to KSAs

- f. Search (Content Search), more info can be found on [page 17](#).
 - 1. Content Search can be used to provide relevant existing information in the database that can be applied to the blank job description template.
 - 2. There are two options to search by:
 - 1. **Smart Search:** returns individual job characteristics across selected Job Family.
 - 2. **Detailed Search:** categorizes job characteristics by individual Job Functions and Key Responsibilities.
 - 3. Select the Key Responsibilities you’d like to add to the JD. Click on **Add to Job** when you are finished selecting the Key Responsibilities.



- ▶ This section allows HR Partner users to find and view job descriptions across campus. Note: This quick link will eventually be limited to showing JDs across respective region.

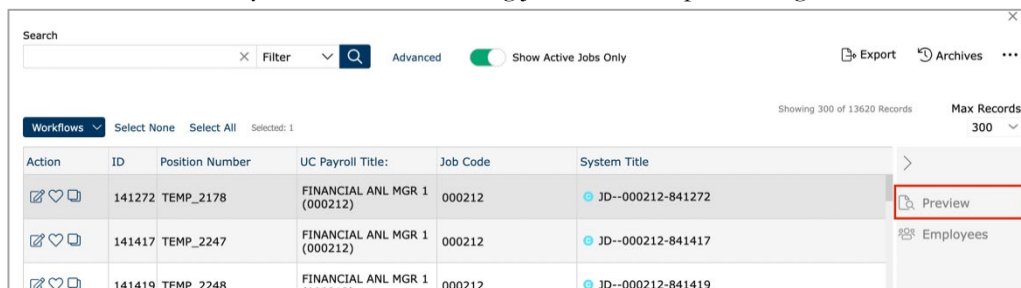


Figure 37

1. This Quick Link automatically has “Job Descriptions Requiring My Review” Filter turned on. **Uncheck “Job Descriptions Requiring My Review” (red “x”) to view all JDs available in the HR Library.**
 2. You can search by Job ID, Position Number, Form Name, Job Code etc. to find your desired JD.
- Actions:
 - Edit:** Double click to view the Job Template, not editable
 - Set as favorite:** ability to filter by “My Favorite Job Description” to find these JDs easier.
 - Select a Job, on the right panel (click the carrot icon), there will be: (Figure 37)
 - Preview:** allows you to view print version of JD. You can also download as Word/PDF.
 - Employees:** allows you to see employees assigned to this Job Description.

TIP:
Uncheck the automatic filter “Job Descriptions Requiring my Review” to have a full search

How to Download JD as Word/PDF

1. Select a JD. Click on the Preview icon . This will open the print version of the JD on the right. (Figure 38)
2. Although there are 4 ways to download a JD, **Word and PDF** are the best options. Click on either icon to:
 - a. **Download as Word**
 - b. **Download as PDF**
3. Afterwards, there will be a confirmation screen pop-up. Click **Download File(s)**.

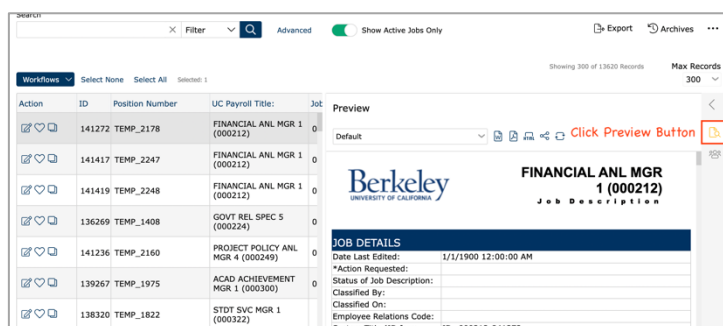


Figure 38

To Start a Workflow

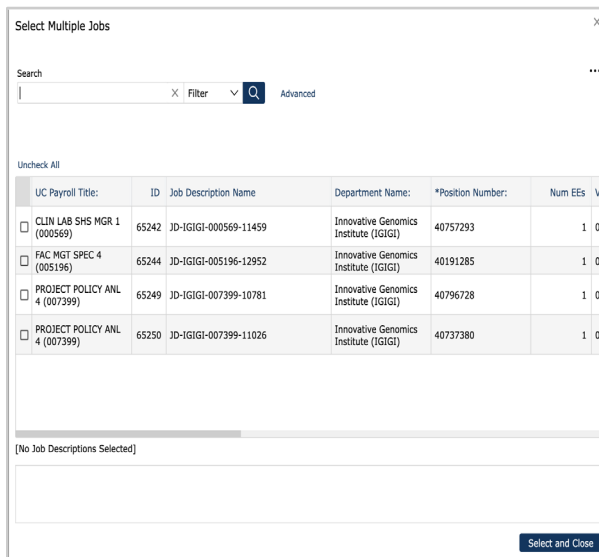
1. Select a JD. Click on the **Workflows** button and Start Express Workflow. **Select Workflow** from the drop-down menu. There is additional information available in the [Workflows section](#) of this User Guide.
2. Select participants for each step in workflow. Remember to include yourself in the first step if you want to Edit the JD right away.
 - **TIP:** Search by Last name,First initial with no spaces (ex: Doe,J)
3. Click **Start Workflow** to have the “Review Job Description” task auto-populate under Tasks on your home page.
4. **Double click on the JD under Tasks on the Home Page to start editing the JD.** Remember to click **Save** on the bottom to save your progress.
5. Approve your step by clicking on the **Thumbs Up icon** in the green banner to move it to the next step in workflow.
 - You can view the progress of this workflow through the “My Job Tasks” Quick Link.

TIP:

1. Search by Last name,First initial with no spaces (ex: Doe,J)
2. Add yourself to first step

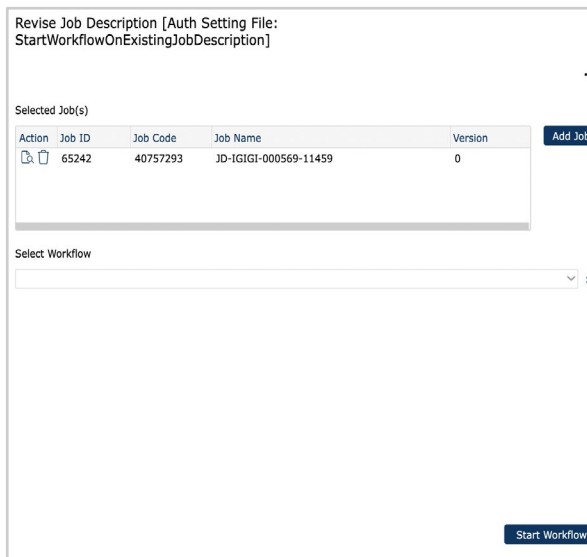
HR Revise JDs

- Allows HR Partners to initiate a JD into workflow and/or revise job descriptions. HR Partners have visibility into JDs across campus. Ensure the JD selected is the appropriate description.



UC Payroll Title:	ID	Job Description Name	Department Name:	*Position Number:	Num EEs
<input type="checkbox"/> CLIN LAB SHS MGR 1 (000569)	65242	JD-IGIGI-000569-11459	Innovative Genomics Institute (IGIGI)	40757293	1 0
<input type="checkbox"/> FAC MGT SPEC 4 (005196)	65244	JD-IGIGI-005196-12952	Innovative Genomics Institute (IGIGI)	40191285	1 0
<input type="checkbox"/> PROJECT POLICY ANL 4 (007399)	65249	JD-IGIGI-007399-10781	Innovative Genomics Institute (IGIGI)	40796728	1 0
<input type="checkbox"/> PROJECT POLICY ANL 4 (007399)	65250	JD-IGIGI-007399-11026	Innovative Genomics Institute (IGIGI)	40737380	1 0

Figure 39







Action	Job ID	Job Code	Job Name	Version
 	65242	40757293	JD-IGIGI-000569-11459	0

Figure 40

To Revise a Job:

- Click **Add Job**
- Check the boxes on the left for the jobs that you would like to revise. (Figure 39)
 - You can use the Search Bar to search by Position Number, Form Name, etc. or Filter
- Select the job you'd like to revise. Then click **Select and Close**
 - The pop-up screen will display the selected job(s) along with some functions. (Figure 40)
 - Actions:
 -  **View:** opens the Job Template in a non-editable form.
 -  **Delete:** allows you to remove Job Description from the revised list.
- Select Workflow** from the drop-down menu. There is additional information available in the [Workflows section](#) of this User Guide.
- Select participants for each step in workflow. Remember to include yourself in the first step if you want to edit the JD right away.
 - Tip:** search for participants by last name, first initial with no space. (ex: Doe,J)
 - Tip:** add the "Primary Record" when adding users to the workflow
- Click **Start Workflow**. The Job Description Review task will appear in the Task Bar on the home page for each participant.
- Double click on the JD** under Tasks on the Home Page to start editing the JD. Remember to click **Save** on the bottom to save your progress.
- Approve your step by clicking on the **thumbs-up icon** in the green banner to move it to the next step in workflow. You can view the progress of this workflow through the "My Job Tasks" Quick Link.

Workflows

Choosing a Workflow

1. **Add Position Number to JD (1-step):** should only be used to enter the Position Number on the JD template.
2. **Employee to Manager (2 steps):** can be used when an Employee needs to edit their own job description.
3. **Formal Classification Review (3-steps):** the workflow that is most frequently used because it is the main workflow that includes the Compensation Team for Classification Evaluation.
 - a. As of January 1, 2023 JDX is to be used for: New Positions before posting for recruitment, Vacant positions that need to be filled, and Reclassification Requests.
 - b. Step 1, add yourself by searching the participant list by Last Name (first person you Add will be the Step Approver), then add any other person(s) who may need to review/edit the JD.
 - c. Step 2, add your [department's BRS HR Partner](#)
 - d. Step 3, add your [department's assigned Compensation Consultant](#)
4. **Preliminary Review: Manager to HR Partner (2 steps):**
 - a. Intended to be used when you are in between making minor edits/major changes to an existing job description.
 - b. Managers can work with their HR Partner to determine if the Compensation Team needs to get involved in the re-review of Classification for a particular JD.
 - i. If Compensation does need to get involved, finalize the Preliminary Review workflow and **start a new** workflow that includes Compensation, i.e. Formal Classification Review 3-step.
5. **Minor Update to JD (1-step):**
 - a. Use when you are creating a JD in JDX for an encumbered position.
 - b. Use when a JD is in Classified status and you are making a minor update.
 - i. There's not a specific percentage as far as what is considered a "minor edit" vs "significant changes." See chart below for guidance.

Examples of Minor Edits:	Examples of Significant Changes: (should go through Formal Classification Review workflow)
Adding in Position Number from UC Path or updating the Employee Name listed on the JD	Adding supervisory components to an individual contributor role (generally should come through for re-review by the assigned Comp Consultant)
Editing the Department Summary	Removing direct reports from a Supervisor or Manager level position
Updating the terminology for a new system/software/project throughout the JD	Adding in a new 30+% key responsibility
Changing 5-10% of the key responsibilities and not updating the problem solving examples	Changing the job description more than 50%

General Steps for Starting a Workflow

1. Select between the 5 Workflows (Manager)/ 6 Workflows (HR Partner. Fill in the boxes underneath with the designated participants. (Figure 41)

Figure 41 is a screenshot of a web form titled "Select Workflow". At the top, there is a dropdown menu showing "Formal Classification Review, MGR to HRP to COMP (3 steps)" with a gear icon to its right. Below this, the form is organized into three columns. The first column is titled "Manager Review" and contains a "Select Direct Manager" button and a plus sign (+). The second column is titled "HR Partner Review and Sign-off" and contains a "Select HR Reviewer" button and a plus sign (+). The third column is titled "Compensation Finalizes Job Description" and contains a "Select Compensation Consultant" button and a plus sign (+).

Figure 41

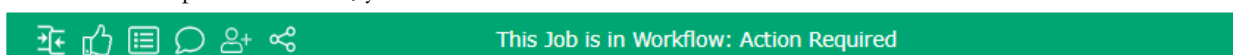
2. Click on the “Select ...” to start selecting a participant for Manager/ HR Partner/ etc. by using Search Bar and filters. Remember to include yourself as the first step if you want to Edit immediately.
 - i. Tip: search for participants by last name,first initial with no space. (ex: Doe,J) Note: add the “Primary Record” when adding users to the workflow
 - a. If you would like to add multiple participants under the same role (i.e., selecting two Direct Managers, click on the plus sign.
 - b. If you have trouble finding the employee’s name, please email compdesk@berkeley.edu for assistance.
3. Click **Add Participant**
 - a. Find your department’s assigned [HR Partner](#).
 - b. Find your department’s assigned [Compensation Consultant](#).
4. After you indicate all Participants for the selected Workflow, click **Start Workflow**
5. The job description will then populate in Step 1 participants’ Tasks on their JDX Home Page. (Figure 42)










Figure 42 is a screenshot of a web page titled "Home Page". Under the "Home Page" header, there is a "Tasks" section. This section includes a search bar with a magnifying glass icon and a "Clear" button. Below the search bar, there is a list of tasks. Each task is displayed in a box with the text "Please Review: [Task Name]" on the left and "Job Description Review" on the right. The tasks listed are "Lab Ast 3", "SRA 3", and "SRA II NEX - Covid Tester".

Figure 42

General Directions for Editing a Job Description

1. A Workflow must be started BEFORE making any edits on a Job Description.
2. Under Tasks, double click “Please Review...” to open the Job Template for revisions. Make necessary edits throughout the Job Description Template. (There are more details on how to fill out the Job Template in the Job Description Template Required Fields section).
3. On the top of the screen, you will see a Green Toolbar. Hover over the icons to see their function.



-  • Compare working copy to base version
-  • Approve Current Workflow Step → moves the JD forward through workflow
-  • Indicate the Current Workflow Step as Complete (*Only appears for the second participant that was added under the same step, i.e. the Step Reviewer). It is not recommended to use this for approving the JD as this indicates to the system that this user no longer needs to make any updates to the JD.
-  • Return/Reject Current Workflow Step. (*Only appears after first step of workflow has been approved, i.e. in Step 2 or Step 3).
-  • Show Workflow Details for the Job Description. You can also replace/add participants in your step in workflow; more information can be found on page 19.
 -  • Add Participant: allows you to add additional participants to your specific step in workflow.
 -  • Replace Participant: allows you to replace existing participants with another
-  • Show all Comments for this Workflow. Comments added are visible while JD is in the workflow *only* by all participants but will disappear when workflow is finalized.
-  • Share Revision Workflow through a link. **This is not the recommended way to share a JD with other participants for review, instead add them a participant.**

4. As you are editing the Job Description, remember to click Save on the bottom right of the screen to save progress as you're working on the JD template. Click on Continue Editing to continue working on JD. NOTE: To Save and Exit the job description, select **Save and Close** at the top left of the JD.

- a. You can also hit Form Errors on the top right to see any sections you may have missed.
5. After you ensure that all the sections have been filled out completely and correctly, hit the **Thumbs Up button** to approve this step in the workflow.
 6. A pop-up showing “Approve Workflow Step” will allow you to send an email to the next step approver.
 - b. Click “Send e-mail to next step approver(s)” to notify them of your approval
 - **Preview Email:** lets you see the email that will be auto sent.
 - **Edit Template:** allows you to edit the default email before it is sent.
 - You can also Cc others.
 7. Depending on the workflow, the same process will continue until it reaches the Final Step Approver.
 - c. Participants will open the Job Review Task on their Home page and make edits as needed and approve when appropriate.
 - a. For participants in workflow, you can click on the **My Job Tasks** Quick Link to view all the workflows you were a part of.



Approving Workflow Step

- ▶ There will be two different pop-ups that will appear before you approve the Workflow based on whether you are a Step Approver or a Final Step Approver.
 - ▶ Ensure checkbox is checked under “Send e-mail to the next step approver(s)...” to send email confirmation.
- d. **Step Approvers:** click **Approve Step** to send this JD to the next person in the workflow for review.

The 'Approve Workflow Step' pop-up form displays a workflow diagram with two steps: 'My Step' (Monica Brown-Buccellato) and 'Pending Next Step' (Monica Brown-Buccellato). It includes checkboxes for sending emails to the next step approver(s) and other participants, with links to preview emails and edit templates. There are also text areas for adding comments and a field for courtesy email CC addresses. An 'Approve Step' button is at the bottom right.

Figure 43: Step Approver Pop-up

- e. **Final Step Approvers:** click **Finalize Workflow** to complete the Workflow.
- Finalized workflow results in a new version number in the system.
 - Automated emails will be sent to the primary participant in this workflow.
 - **Note:** finalizing a workflow does not mark a job as Classified; it is only marked as having a workflow Approved and Finalized.

The 'Finalize Workflow for JD--007375-845585' pop-up form offers options to 'Finalize the Workflow and Save the changes to Job.' (selected), 'Notify Managers', 'Save Revised Job as a new Job', or 'Send e-mail to Primary Participant: Jennifer Lei' (checked). It includes links to preview emails and edit templates, a comment field, and a 'Finalize Workflow' button.

Figure 44: Final Step Approver Pop-up



Rejecting Workflow Step

- ▶ You can only reject a workflow step after it has been approved by the first participant in workflow.
- ▶ Reject a workflow step by clicking on the thumbs-down icon in the green banner. The first participant in workflow will not see this icon in their green banner

Steps to Return Workflow:

1. Click on the **thumbs-down icon** in the green banner.
2. There will be a pop-up which will allow you to send an email notifying the prior participant in workflow that you have rejected your step in workflow.

In this case, HR Partner Stacy is sending the workflow back to Manager Jennifer for further review.

- a. Ensure checkbox is checked under “Send e-mail to the next step approver(s)...” to send email to prior participant in workflow.
- b. You can also check “Send courtesy e-mail to other participants” if you’d like to Cc anyone else. Include their emails in the “Courtesy E-mail CC” line.

3. Click on **Return Step** to complete the action.

Figure 45: Return Workflow Step



Marking Workflow Step as Complete




- ▶ Additional participants added to each step in workflow (i.e. Step Reviewers) have the option to mark the workflow as “completed” by clicking the Checkmark icon in the green banner.
- 1. Step Reviewers are not recommended to use the Checkmark in the green toolbar as doing so indicates to the system that you no longer need to make any edits on the JD.
- ▶ Additional participants added to each step in workflow do not have the thumbs-up icon to approve a workflow.

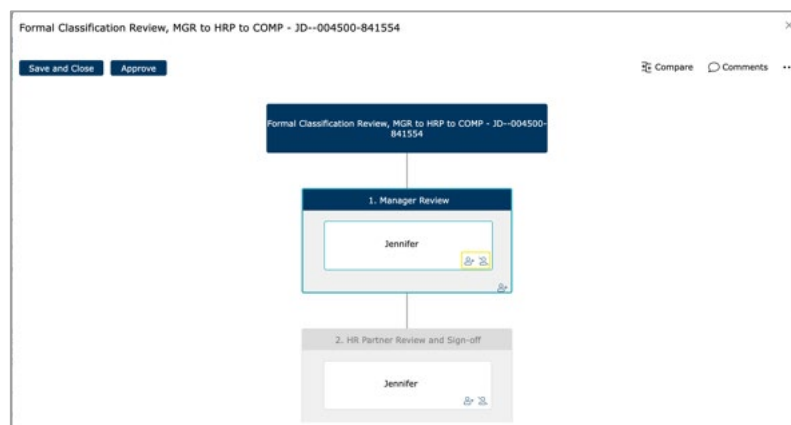
Steps to Mark Workflow Step as Completed:

1. Click on the checkmark icon in the green banner.
2. There will be a pop-up which will allow you to send an email notifying the primary approver in your step of workflow that you marked the workflow as completed.
 - a. You can Cc additional participants by including their email in the CC row.
3. Click **Send Email** to complete the action.

Figure 46: Mark Workflow Step as Complete

Workflow Details

1. Click **Workflows** located on the top of the screen allows you to access **Workflow Details**
2. **Workflow Details:**
 - Allows you to see a detailed view on which workflow a JD is in
 - Lists the participants in each step in workflow along with their approval signs.
 - The step marked in a blue outline represents the step in workflow a JD is currently in. For example, this workflow is currently in the Manager Review Step. (Figure 47)
 - Actions:
 -  **Approve:** approves the current step and the workflow automatically routes the JD to the next step in the workflow (same as clicking the Thumbs Up icon).
 -  **Compare:** lets you view edits made by participant vs original Job Description Template
 -  **Comments:** leave comments on the job description form.
 - Comments added are visible while JD is in workflow by all participants but will disappear when workflow is finalized.
3. **Adding/Replacing Participants in Workflow**
 - Primary approvers are the only people that can add additional users to their step in workflow.
 - All users can replace participants if they are part of that step in workflow.





- Grey Boxes (Figure 47)
 -  **Add Participant:** add additional participants if needed.
 - **Tip:** Search by Last name, First initial with no space (Doe,J) **Note:** add the “Primary Record” for every participant in workflow. **Note:** you may only add participants to the step in workflow that you are a part of (once workflow has started)
 -  **Replace Participant:** allows you to replace an existing participant with another.
 - Find your department’s assigned [HR Partner](#).
 - Find your department’s assigned [Compensation Consultant](#).

Figure 47

Deleting a Workflow

- ▶ **Note:** Deleting a Workflow will delete any and all edits made to the JD while the JD was in that workflow.
- ▶ Steps to take if wrong workflow was selected:
 1. If you'd like to keep the edits made thus far, continue making edits in the current workflow.
 2. Save edits and give a Thumbs Up to complete and finalize the workflow.
 3. Find the JD in the Department Library and start the correct workflow.
- ▶ DX Admins, Comp Team, and Step Approver roles can delete workflows.
- ▶ Only Admin can delete JDs.
 1. Email compdesk@berkeley.edu for additional assistance in deleting workflows/JDs.

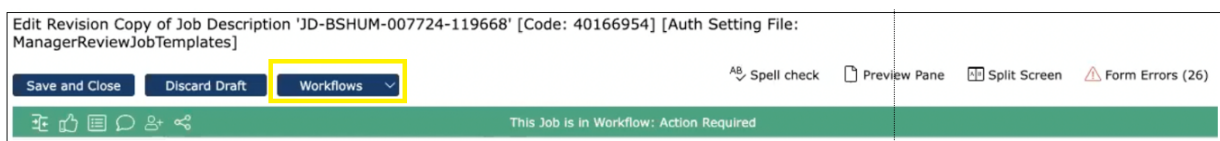


Figure 48: Workflow Details

1. Click Workflows and then click **Workflow Details** to view the audit trail of the Workflow. (Figure 48)
2. Click the three dots located on the right side of the screen. Select **Delete Workflow**. (Figure 38)
3. A pop-up will appear, allowing you to send an email notification to the primary participant and other participant(s) if needed. You can preview the email sent or edit the template before it is sent out. (Figure 49)
4. Click **Delete** to finalize the deletion of the workflow.

***NOTE:** Deleting a Workflow will delete any edits made to the JD while the JD was in that workflow.

Figure 49: Notify Participants of Deletion via Email



Comparing Between Different Versions of the JD Template

1. This Compare feature is similar to Tracked Changes.
2. Under the Green Bar, click on the first icon to compare the old version and the new version of the Job Description.
3. You can either view the changes as:
 - a. **Merged Changes** or

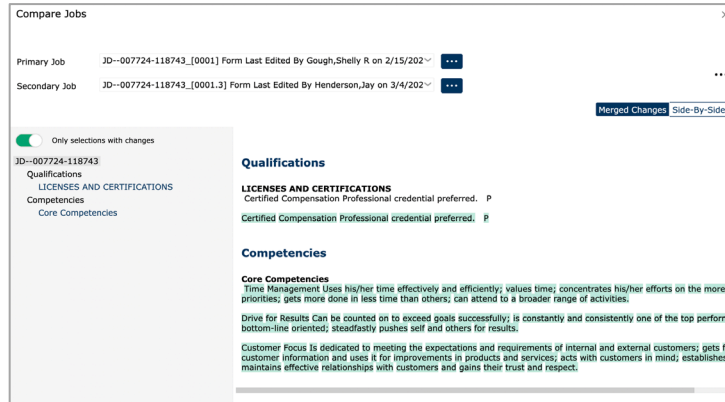


Figure 50

- b. **View the changes Side-by-Side.** Changes will be highlighted in green

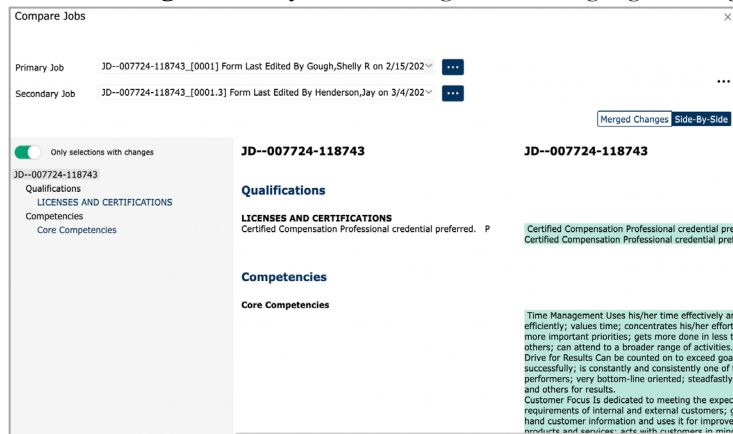
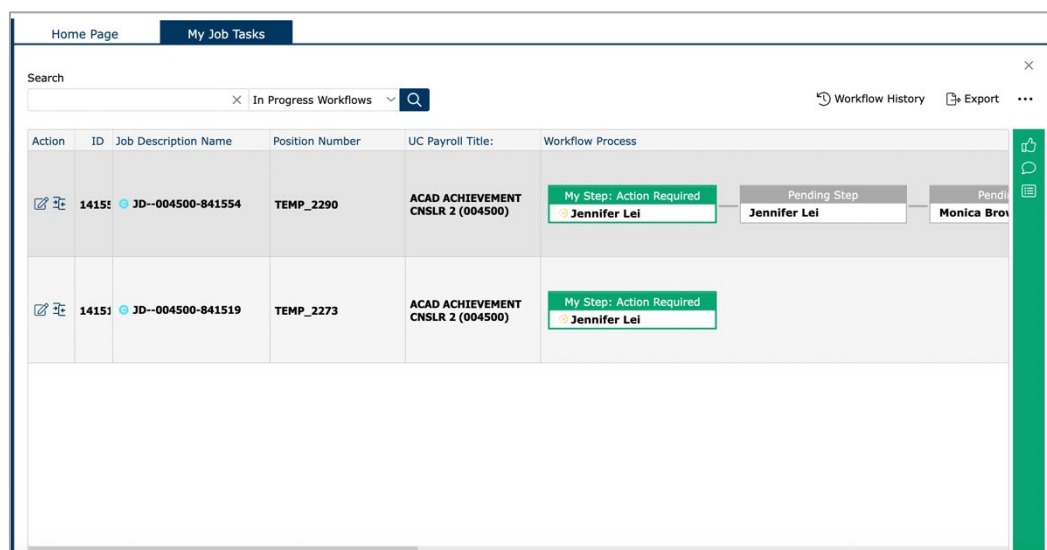


Figure 51

My Job Tasks

- ▶ Allows users to **view any JD that's in an active workflow** that you are part of (even if the JD is not in your step of workflow currently).
- ▶ Workflow Process - displays each step of the workflow and marks in Green any JD that's in your Step and that you are the Step Approver for. (Your step will be marked in dark Blue when the JD is in your Step but you are not the Step Approver)
- ▶ This Quick Link will not show in your JDX view if you do not have any JDs in an active workflow that you are a part of.
- ▶ **Once a workflow has been finalized, it will no longer appear in this Quick Link. Note: you can find the completed JD in the Department Library Quick Link.**










Action	ID	Job Description Name	Position Number	UC Payroll Title	Workflow Process
	14151	JD--004500-841554	TEMP_2290	ACAD ACHIEVEMENT CNSLR 2 (004500)	<div>My Step: Action Required Jennifer Lei</div> <div>Pending Step Jennifer Lei</div> <div>Pending Step Monica Bron</div>
	14151	JD--004500-841519	TEMP_2273	ACAD ACHIEVEMENT CNSLR 2 (004500)	<div>My Step: Action Required Jennifer Lei</div>

Figure 52

- Actions:
 -  **Edit:** Double-click a JD to start editing.
 -  **Compare:** compare the old version and the new version of the JD. See more [here](#).
- Workflow Process: lists all participants that are part of a JD's workflow. The workflow step marked in green represents which step in workflow a JD is currently in. **Note:** once a workflow has been marked completed, it will be removed from this quick link. Instead, you can find the completed JD in the Department Library Quick Link.
- Green Side Bar: located on the right-hand side of your screen
 -  **Approve step:** allows you to approve your step in Workflow
 -  **Comments:** allows you to view all comments that have been included throughout the workflow process. You can add a new comment by clicking on **Add Comment**
 - *Note:** once a workflow has been finalized, the comments will disappear
 -  **Workflow Details:** see more details on [Workflow Details](#)
 - Allows you to see a detailed view of which workflow a JD is in
 - It also lists the participants in each step in workflow along with their approval signs.
 - The step marked in a blue outline represents the step in workflow a JD is currently in.

SRA Addendum

- ▶ Completion of the SRA Addendum is required when submitting a Staff Research Associate (SRA) position to the Compensation unit review.
- ▶ The SRA addenda is a job evaluation tool, used to assist you and/or your HR Partner in providing necessary and basic information about the key responsibilities of SRA positions
- ▶ If you have any questions about this addendum, [contact your Compensation Analyst](#).

The screenshot shows a web application interface for the SRA Addendum. At the top, there are buttons for 'Save and Close', 'Discard Draft', and 'Workflows'. To the right, there are links for 'Spell check', 'Preview Pane', 'Split Screen', and 'Form Errors (141)'. Below these is a green banner that says 'This Job is in Workflow: Action Required'. The main content area is titled 'Staff Research Associate 1' with an 'Edit' button. On the left, there is a sidebar with a list of items: 'Problem Solving Examples', 'Appointment Details', 'Physical, Environmental, and Mental Demands (PEM)', 'Reporting Requirements and Critical Positions', 'SRA Addendum' (which is highlighted), 'Signature Page', 'Competencies', 'Workflow Details', 'HR/Comp Approvals', and 'Compensation Information'. The main content area has a blue header 'SUPPLEMENTAL QUESTIONNAIRE FOR STAFF RESEARCH ASSOCIATES'. Below this, there are two sections: 'I. OUTLINE OF RESEARCH PROJECT(S)' and 'II. SKILLS AND VARIETY OF FUNCTIONS REQUIRED BY POSITION'. Each section has a text box for input. At the bottom right, there are buttons for 'Previous', 'Next', and 'Save'.

Figure 53

1. Previously, SRA positions needed to fill out the Staff Research Associate Position Addendum through Word. **Now, the SRA Addendum is incorporated into JDX for all SRA Positions.**
2. When you add a new SRA position, the SRA addendum will automatically pop up. You can find it on the left-hand side of the job template.
3. Some text boxes may appear to not expand but once you click “Save” and return to edit the template, the textbox will expand.

JD Acknowledgement and Signatures

- Appears when you open the **print preview pane** for a job description
- Where to find Preview Pane:
 1. Jobs that Report to Me Quick Link
 2. Department Library Quick Link
 3. HR Library Quick Link

Employee Name	
Employee Signature	
Employee Date	
Supervisor Name	
Supervisor Signature	
Supv Date	
Department Head Name	
Dept Head Signature	
Dept Head Date	

- The signature section can be used in conjunction with current onboarding processes for new hires and/or reclassifications of incumbered positions. DocuSign can be used to fill in these fields and gather e-signatures.
- A copy of the JD with the signatures section completed should be filed and saved in the Employee Personnel File.

View my Job Description

- ▶ View your own job description.
- ▶ Opens a print view of your Job Description.
- ▶ *Note: if the **Status** of your Job Description indicates:
 - “DEFAULT Conversion – JOB STANDARD ONLY” then your Manager/Supervisor will need to update Job Builder/JDX with your actual Job Description before you can view your own job description in the JDX platform. (Figure 54)
 - “Classified” then this JD is your actual customized job description. (Figure 55) Note: If you have questions about your Job Description, please contact your Manager/Supervisor.

The screenshot shows a 'Preview' window for a job description. At the top, there's a 'Default' dropdown and icons for Word, PDF, HTML, and a share icon. Below this is the Berkeley University of California logo and the job ID 'JD-FMHUM-007394-23023'. The 'JOB DETAILS' table is as follows:

JOB DETAILS	
Date Last Edited:	4/20/2022 5:18:43 PM
*Action Requested:	Conversion
Status of Job Description:	DEFAULT Conversion - JOB STANDARD ONLY
Classified By:	
Classified On:	
Employee Relations Code:	

Figure 55

The screenshot shows a 'Preview' window for a job description. At the top, there's a 'Default' dropdown and icons for Word, PDF, HTML, and a share icon. Below this is the Berkeley University of California logo and the job ID 'JD-FMHUM-007394-23023'. The 'JOB DETAILS' table is as follows:

JOB DETAILS	
Date Last Edited:	4/20/2022 5:22:01 PM
*Action Requested:	Conversion
Status of Job Description:	Classified
Classified By:	Monica Brown-Buccellato
Classified On:	10/12/2021
Employee Relations Code:	E-All Others - Not Confidential

Figure 54

- Job Descriptions are linked to each staff employee based on the Position Number field on the JD Template in JDX. If the JD does not have the UC Path Position Number saved on the JDX template, the description will not show in a user's View My Job Description quick link.

Download JD as Word/PDF

1. Although there are 4 ways to download a JD, **Word and PDF** are the best options. Click on either icon to:
 - a. Download as Word
 - b. Download as PDF
2. Afterwards, there will be a confirmation screen pop-up. Click **Download File(s)**.

Job Description Template Required Fields

1. *Job Details

a. Job Status and History

- Date last edited: auto-populates; time will update after clicking save (currently displays EST)
- ***Action Requested:** required, select from choice list
 - **New Position:** used for creating new positions (new FTE)
 - **Reclassification:** used for requesting a reclassification of an existing position (start from a new JD template of the proposed Job Title)
 - **Update Job Description:** used for jobs that exist and were formerly classified (outside of JDX) and initiator is creating the JD in JDX. Also used for making updates to existing JDs in JDX
 - **Conversion:** displays when the JD was imported from the old Job Builder
 - **Delete JD from JDX:** used for requesting a JD to be deleted from JDX
- Status of Position Description: editable by comp only
- Classified By: editable by Comp only
- Classified On: editable by Comp only
- Employee Relations Code: editable by Comp only
- System Title (JD form name): auto-populates, non-editable

b. Position and Employee Details (*see Additional Information below*)

- ***Position number:** required, editable
- ***Employee name:** required, editable
- ***Supervisor name:** required, editable

c. Organization

- ***Department:** required, select from choice list
- ***Department Summary:** required, editable
- Department Requirement: non-editable
- Dept Level 4: auto-populates based on department selection (**after clicking save**)
- Sub-Division: auto-populates based on department selection (**after clicking save**)
- Division: auto-populates based on department selection (**after clicking save**)
- Location (business unit): auto-populates, defaults to BKCMP

d. Job Details (all auto-populated)

- Job Code: auto-populates, non-editable
- UC Payroll Title: auto-populates, non-editable
- Job Category: auto-populates, non-editable
- Job Level: auto-populates, non-editable
- Job Family: auto-populates, non-editable
- Job Function: auto-populates, non-editable
- Job Family Description: auto-populates, non-editable
- Job Function Description: auto-populates, non-editable
- Personnel Program: auto-populates, non-editable

- Salary Structure: auto-populates, non-editable
- Default FLSA Status: auto-populates, non-editable
- Working Environment: auto-populates, non-editable
- e. Upload Attachments: available once JD is in workflow

2. *Overview

- a. Job Summary
 - i. Working Title: auto-populates, editable
 - ii. *Job Summary: required, editable
 - iii. Generic Scope: auto-populates, non-editable
 - iv. For Reference Only – Custom Scop from Job Standard: auto populates, noneditable
 - v. *Custom Scope: auto-populates, editable
- 3. *Reclassification (section only shows when Reclassification is selected under Action Requested in Job Details)

a. *Reclassification Request Questionnaire (each field is required to be completed)

- Is this action being performed for the purpose of recruitment?
- Incumbent's Name
- Current Job Title and Job Code
- Proposed Job Title and Job Code
- Four short answer questions
- Four multiple-choice questions:
- Attachments

4. *Key Responsibilities (minimum of 4, maximum of 15)

- a. *Key Responsibilities: auto-populates, required, editable
 - i. Edit and customize each applicable key responsibility from the job standards
 - ii. Input the percentage of time spent for each key responsibility listed
 - iii. Indicate which key responsibility is Essential/Not Essential (by checking the box)

5. *Knowledge, Skills, and Abilities (KSAs)

- a. For Reference Only – Knowledge, Skills, and Abilities from Job Standard: auto populates, noneditable
- b. *Knowledge, Skills and Abilities: required, editable
 - i. Indicate which KSAs are Required vs Preferred
- c. For Reference Only – Education: auto populates, noneditable
- d. Education: auto-populates, editable
 - i. User can add additional education
- e. For Reference Only – Licenses and Certifications: auto populates, noneditable
- f. Licenses and Certifications: editable
- g. Additional Licenses and Certifications: editable
- h. Budgetary Responsibilities: editable

6. *Supervision

- a. *Level of Supervision received: required, select from choice list
- b. Direct Reports (Subordinate Staff): editable
 - *(if the position will have direct reports, this section is required to be completed)
- c. Legacy Names and Payroll Titles of Employees

7. *Problem Solving Examples

- a. Common problems solved by this position: editable (3 required)
- b. Less frequent and more complex problems solved by this position: editable (3 required)
- c. Problems or situations that are referred to the supervisor of this position: editable (3 required)

8. Appointment Details: optional

- a. FTE: editable
- b. Employee Class: editable, select
- c. Working Days: editable, select
- d. Working Hours: editable
- e. Work Location: editable

9. *Physical, Environmental, and Mental Requirements (PEM)

- a. Physical Demands Category: Select an option to see pre-filled selections populate below
- b. Physical Demands: required, select
- c. Environmental Requirements: required, select
- d. Blood/Fluid Exposure Risk: check the category
- e. Mental Demands: required, select
- f. Travel Requirements: required, editable
- g. PEM Legacy: editable

10. *Reporting Requirements and Critical Positions

- a. Reporting requirements and Critical Positions: editable, check any that apply
- b. Essential elements of critical positions: editable, check any that apply

11. Competencies

- a. UC Core Competencies: read only

12. Workflow Details

- a. Workflow Approvals: lists the participants in workflow
 - i. Approvals: non-editable
 - ii. Reviewer Comments: non-editable

13. HR/Comp Approvals

HR Approvals – HR Partners should fill out letters a-e if known:

- a. Is this JD from a Copy of another JD: editable
- b. ServiceHub Case: editable
- c. ServiceHub Task: editable
- d. Was this job classified outside of JDX: editable
- e. What date was this job previously classified: editable

Comp/Classification Approvals – Compensation will edit

- f. Classification Approved Action: required, editable
- g. Comp Decision Date: editable
- h. Comp Approved Job Title: automatically populates, editable
- i. Proposed Job Title (if different from Approved title): editable
- j. Change Payroll Title: editable, select
- k. JDX Job Description ID: automatically populates, non-editable
- l. *Original Job ID: required, editable

HR/Comp Reviewer comments

- m. Classification Decision/Summary of Comp Reviewers Decision: editable
 - n. Other Comments/Additional Information to Support the Comp Reviewer's Decision: editable
 - o. Strength of Classification: required, editable, select
 - p. Comp Team Notes (visible by Comp. only)
 - q. HR Partner Notes (Visible by HR User Role and Comp ONLY)
 - r. CUA (MSP) Review: editable by CUA only. Used when CUA wants/needs to input their MSP review decision into JDX this box is for them.
 - s. General Notes: editable
 - t. Historical Notes: editable
 - u. Attachment
 - v. Job Builder Last Modified Date: automatically populates, non-editable
14. Compensation Information: visible to Compensation only

Additional Information:

Position Number → including a valid and active Position Number on the Job Description (JD) template **will not automatically input the Employee Name and Supervisor Name** into those fields on the JD.

- The Position Number connects the JD to the Employee and to the Manager in the system, however, it does not automatically input this info onto the JD template itself. (include Position Number on JD by using Add Position Number to JD, 1-step workflow)
- Both the Employee Name and Supervisor Name fields are to be manually entered on the JD template. If the job is vacant, the Employee Name field should indicate "Vacant". (use Minor Update to JD, 1-step workflow)
- Note: This also means if the Position becomes vacant or encumbered by another Employee, the Employee Name field should be manually updated in JDX. (use Minor Update to JD, 1-step workflow)
- Including the Employee Name and Supervisor Name on the JD template will allow for easier searching in the HR Library, HR Revise JDs, and other areas in the system.

Other Resources

- Find additional information on the People & Culture Compensation website:
<https://hr.berkeley.edu/compensation-benefits/compensation/job-builder>