# JOB BUILDER

# JDXpert User Guide

UC Berkeley People & Culture

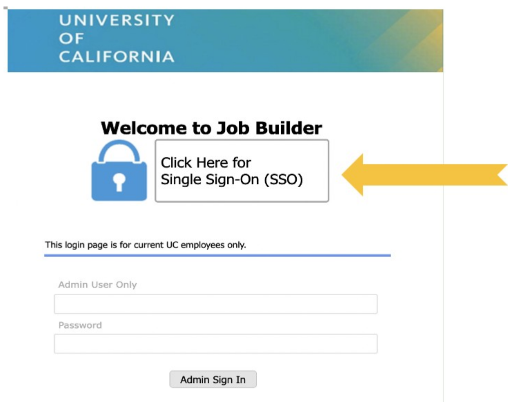
compdesk@berkeley.edu

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

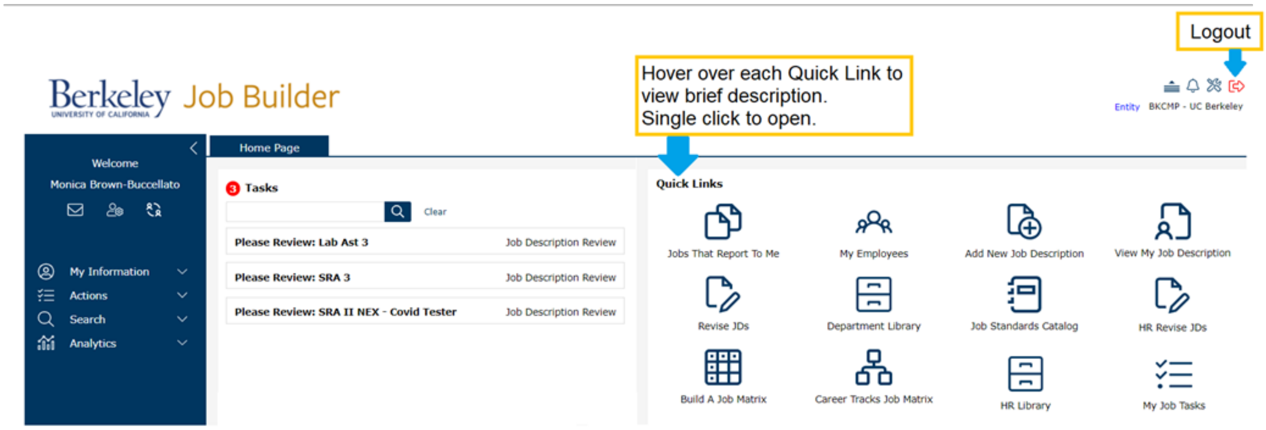
*Note: This User Guide is being updated monthly during implementation of this new system. Please continue to visit the P&C website for the most updated version.*

# Job Builder (JDXpert)

Updated [20 minute video]




- Tool for managers to use when preparing 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** (CalNet Authentication is required).




- To search and find a Job Standard select **Job Standard Catalog**.
- To begin creating a new job description select **Add New Job Description (Select Base Job)**
  - Every Job Description in Job Builder must have a Workflow started to save and edit in the system → Use Formal Classification Review, 3-step workflow.
  - Add yourself to Step 1 of any workflow you select.
- (Managers/Supervisors) To update an existing job description select: **Jobs That Report to Me** or **Revise JDs. (Find the JD, click once to select, and click Workflow to choose a workflow).**
- (Managers/Supervisors) To view job descriptions of your Direct Reports select **Jobs That Report to Me.**
  - To find JDs without a Position Number select **Department Library.**
- (HR Partners) To find a job description select **HR Library.**
  - To initiate updating an existing description click to select the JD and then Start Workflow.

**Questions?** Email UCB's Compensation team at compdesk@berkeley.edu or join a virtual drop-in session

# Table of Contents

# 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 | 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.<br><br>*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. | 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 | 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.<br><br>If you need access to additional departments, please email compdesk@berkeley.edu. | 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.<br><br>Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email compdesk@berkeley.edu.<br><br>***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.<br><br>Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email compdesk@berkeley.edu.<br><br>***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.<br><br>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.

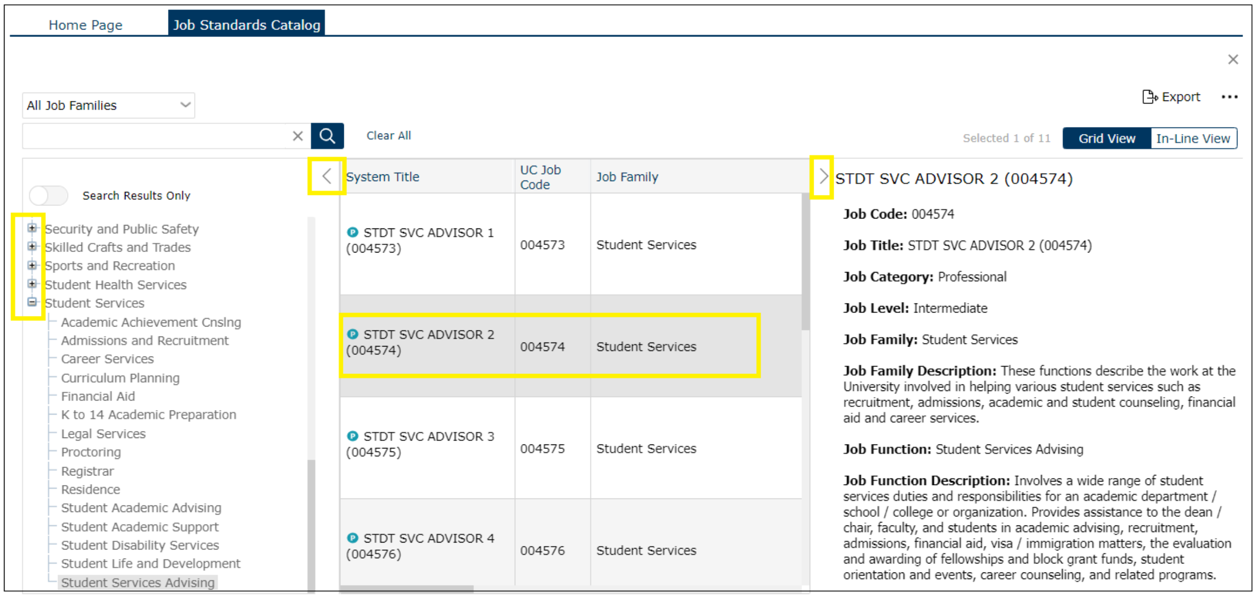



Figure 1

## To Search for Job Standard by Job Family

- Start by selecting a Job Family by either:
    a. The drop-down menu labeled "All Job Families." This gives a full list of the UC Job Families.
    b. Use the carrot (<) on the left side of the screen. The carrot is located to the left of System Title. (Figure 1)
        i. 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 Job Sub Family, Job Level, etc.

# Career Tracks Job Matrix

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

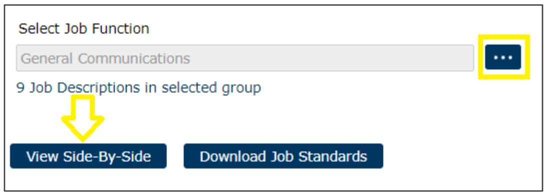



Figure 2

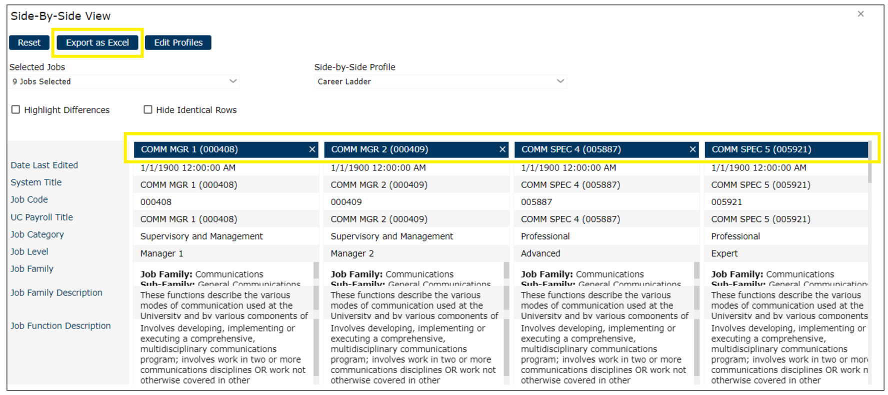



Figure 3

## Get Started

1. Click ••• (Figure 2) 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 either:
    a. Click **View Side-By-Side**
        i. Displays all Job Standards across a Job Function. (Figure 2)
    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 2).
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 3)
        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.

# 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

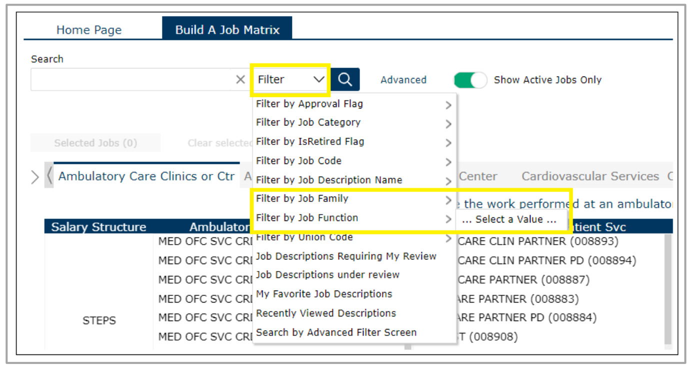


Figure 4

1. Use the Filter function next to the search bar (Figure 4).
   a. Click Filter by Job Family and Select a Value.
   b. Select your desired Job Family.
2. Use the carrot (>) on the left side of the screen (Figure 4, carrot is located to the left of Ambulatory Care Clinics..).
   a. Displays a drop-down list of all Job Families.
   b. Click [+] to display additional Job Functions under each Job Family.
3. 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

## General Steps for Building a Job Matrix

1. 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.
   a. *Note: Job Standards with a STEPS Salary Structure are represented jobs
4. Click on **Selected Jobs** to view the Job Standards and compare. (Figure 5)
5. Once you've selected the job titles you want to compare, Click **Side-By-Side**

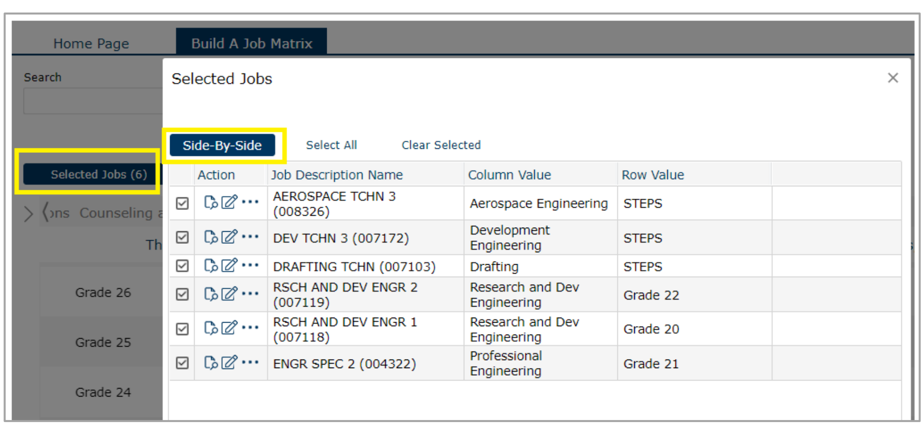


Figure 5

## 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 6)
  - Reset resets the chart.
  - 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.

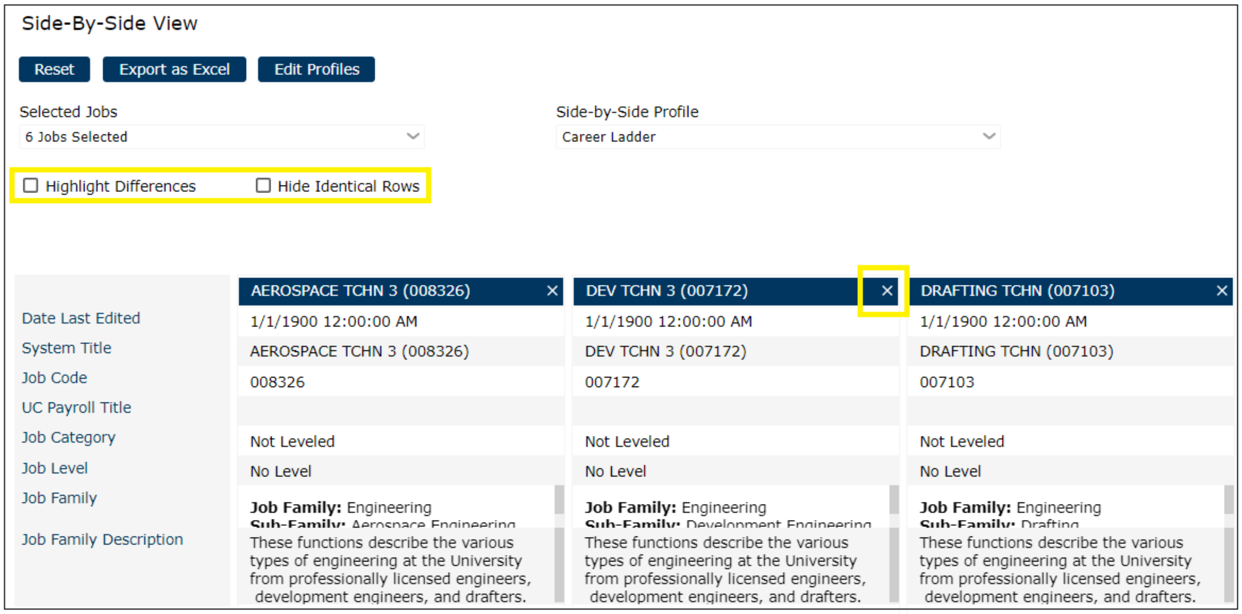


Figure 6

# 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.
- Easily revise a job description through this Quick Link (click & select the JD, click "Workflows", and Start Express Workflow).
- 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 in the JDX platform. Classified means a Compensation Consultant has reviewed and classified this JD. (Figure 7)

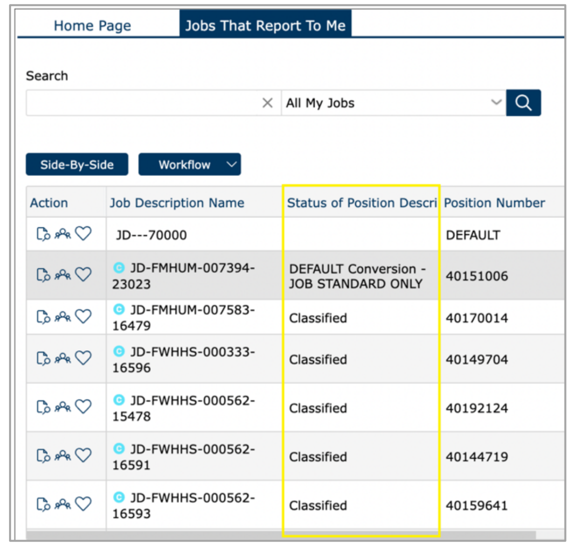



Figure 7

- 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 7.
- 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

1. Click & select the job that you would like to revise (highlights the job row in grey).
2. Click on Workflow and **Start Workflow**. Choose between the options. There is additional information available in the Workflows section of this User Guide.
3. Select participants and click Start Workflow. Remember to include yourself in the first step.
   - Tip: search for participants by **last name,first initial with no space**. (ex: Doe,J)
4. Click Start Workflow 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 banner to move it to the next step in workflow.
7. 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 encumbered 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.

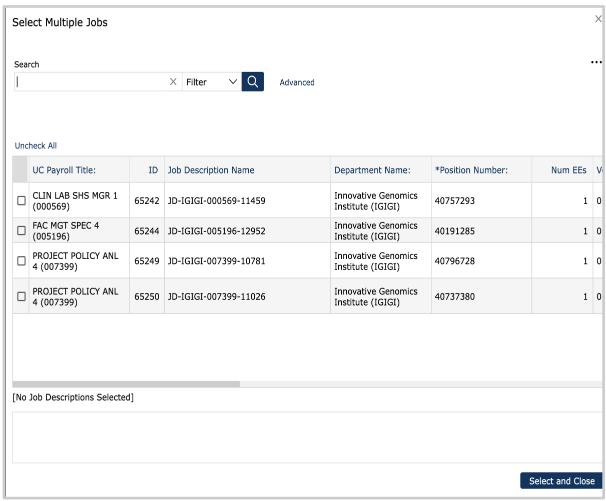



Figure 8

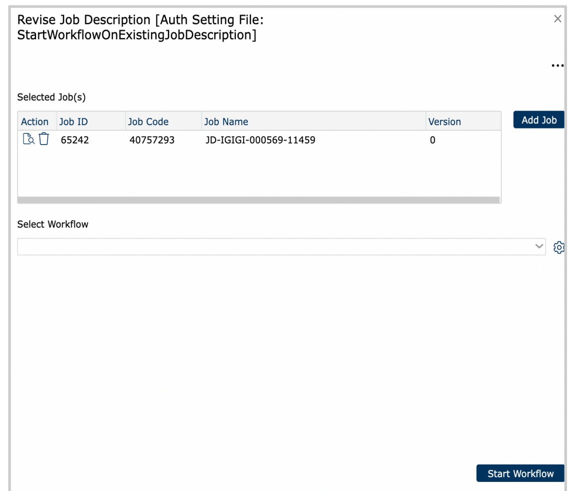



Figure 9

## To Revise a Job

1. Click Add Job
2. Check the boxes on the left for the jobs that you would like to revise. (Figure 8)
    a. You can use the Search Bar to search by Position Number, Form Name, etc
3. Select the job you'd like to revise. Then click Select and Close
    a. The pop-up screen will display the selected job along with some functions. (Figure 9)
    - Actions:
        - View Job: allows you to view the Job Template, not editable.
        - Delete: allows you to remove Job Description from the revised list.
4. 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!
5. Click Start Workflow The Job Description Review task will then appear in the Task Bar on the home page for each participant.
6. **Double click on the JD** to begin revising the Job Description. Remember to click **Save** on the bottom to save your progress.
8. 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, anyone with a Direct Report) to search a department-wide Job Description Library using text search and quick filters.
- 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.

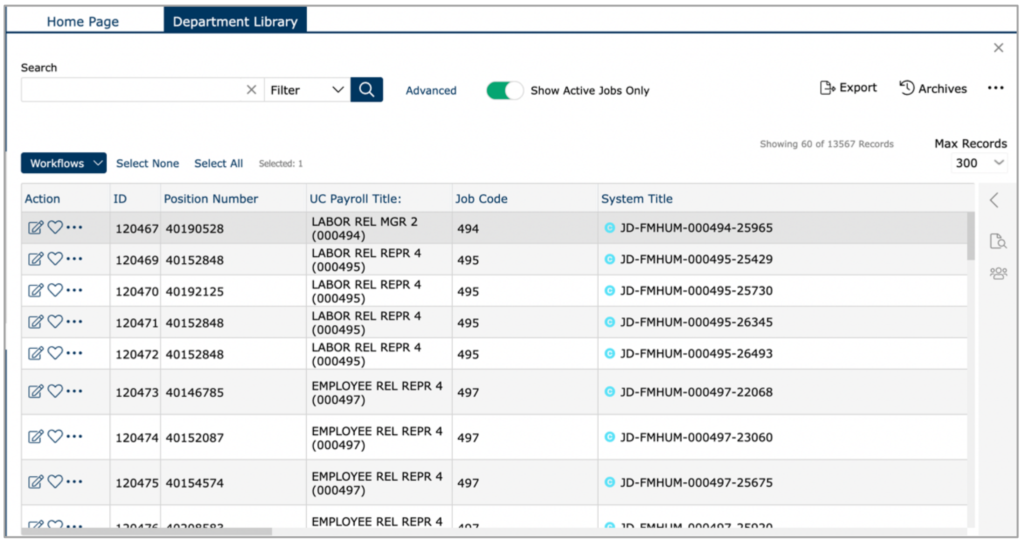



Figure 10

1. This Quick Link automatically has "Recently Viewed Descriptions" checked. Uncheck this to view all JDs available in your department.
   - If you need access to additional departments, please email 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 your Manager/Supervisor will need to update Job Builder/JDX with your actual Job Description before you can view in the JDX platform. **Refer to "To Make Updates to a Job Description.")**
   - It must then be routed to the respective Compensation Consultant for review.
   - Classified means a Compensation Consultant has reviewed and classified this JD. (Figure 7)

- Actions:
  - Edit: Double click a Job Title to start editing.
  - Set as favorite: when favorited, it allows for the ability to "<u>Filter</u> by My Favorites" which may help locate these JDs faster.
  - More Actions: Allows you to create a copy of a JD.
- 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.

## How to Download JD as Word/PDF:

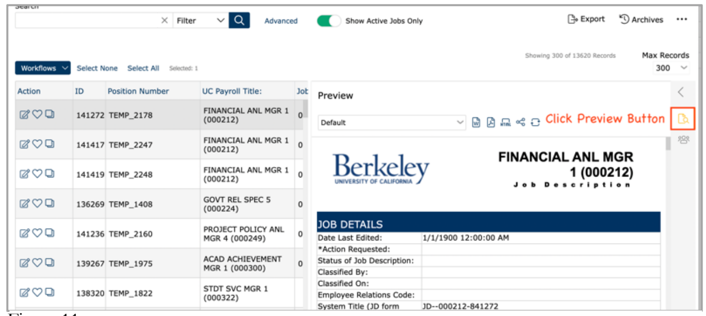



Figure 11

1. Select a JD. Click on the Preview icon. This will open the print version of the JD on the right. (Figure 11)
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).**

## To Make Updates to a Job Description

1. Click & select the job that you would like to revise (highlights the job row in grey). (Figure 11)
2. Click on the Workflows button and **Start Express Workflow**. Choose between the options. There is additional information available in the [Workflows section]() of this User Guide.
3. Select participants for each step in workflow. Remember to include yourself in the first step!
   1. Tip: search for participants by **last name,first initial with no space.** (ex: Doe,J)
4. Click Start Workflow 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 banner to move it to the next step in workflow.
7. You can view the progress of this workflow through the "My Job Tasks" Quick Link.

# Add New Job Description

- This function allows you to create a new job description or 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.

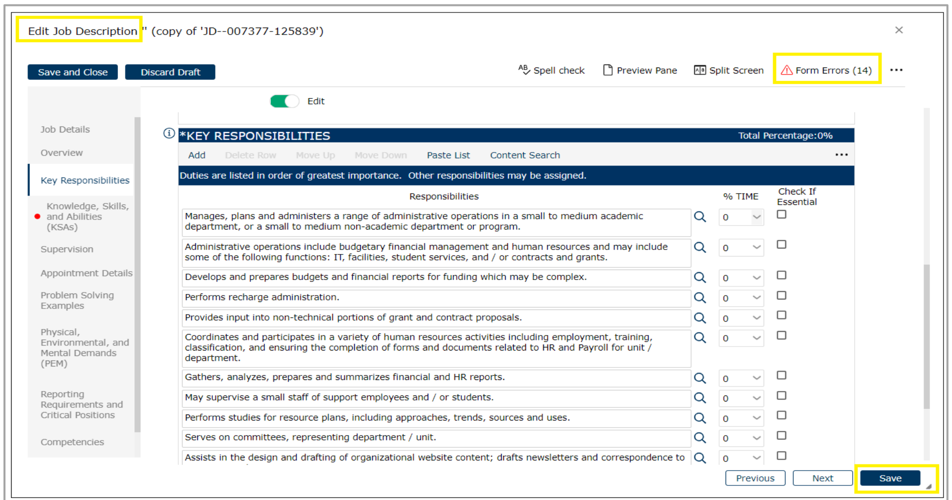


Figure 12

## Add a New Job Description

1. Select **Base Job**.
2. Search by the job code or job title, click the title once, then Select and Close

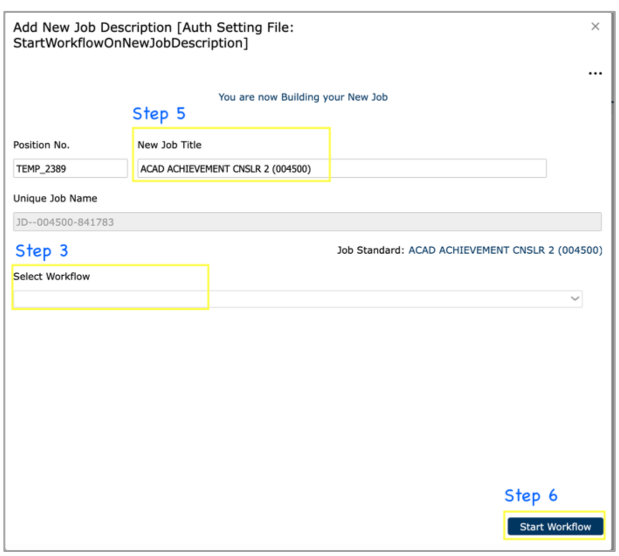


Figure 13: Add a New Job Description

3. Next, Select the Workflow from the drop-down menu. More information in the Workflows section.
4. Choose the Formal Classification Review workflow.
   - **Tip**: search by **Last-name,First-initial with no spaces.** (ex: Doe,J)
   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. Add the working title or the department org node to the end of the New Job Title field to make it unique.
6. Click on Start Workflow, then click on the "x" to close the next screen that displays the workflow that was started.
7. 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.

8. 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).
9. 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 14)
    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 14/15)
3. When you are finished highlighting all the descriptions that you like, click Add to Job on the bottom right.

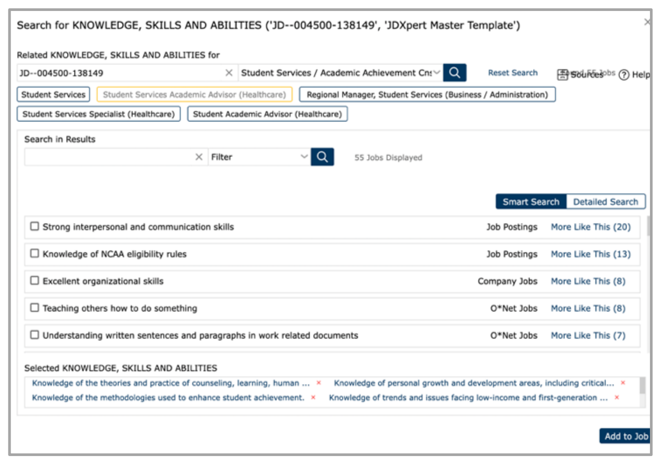


Figure 14: Smart Search

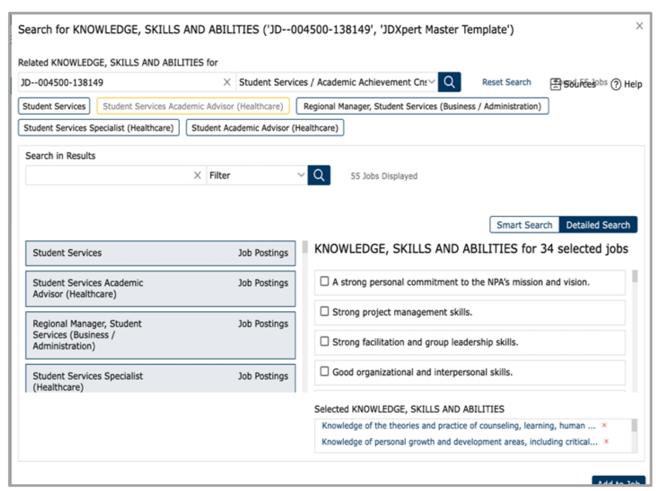
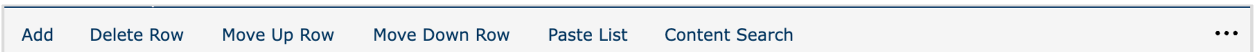


Figure 15: Detailed Search

# Toolbar Functionalities in Job Template

- This toolbar can be seen throughout the Job Template in various sections
- The "Paste List" function can be useful when you input data from a separate file (such as Word) onto 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 16)
   - Text Editor allows you to copy/paste text from a separate document, like Word, onto this text editor
   - A line break is identified by a capital letter that starts a new sentence. (Figure 16)
   - Example: every line break represents a new row in the Key Responsibilities section. (Figure 17)

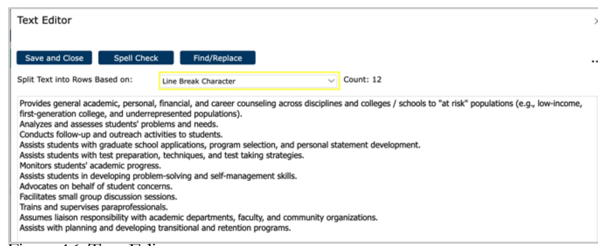



Figure 16: Text Editor

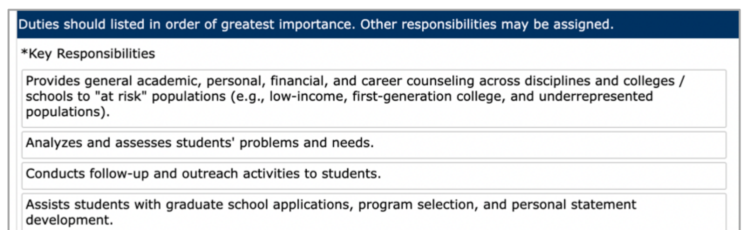
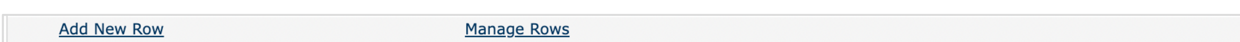



Figure 17: How Text Editor Looks in Key Responsibility Section

6. **Content Search:** can be used to provide relevant existing information in the database that can be applied to the blank job description template. See more info on page 13.
   - 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
   a. **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.
   b. **Indent Row:** allows you to indent the selected row
   c. **Delete all Rows:** deletes all rows. You can undo this action by closing the form without saving.
   d. **Find/Replace all Text:** finds and replaces all text in selected row

# Editing Key Responsibilities and KSAs

**Key Responsibilities**

1. 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 to as a reference when editing the Key Responsibilities section.
2. Key Responsibilities: editable field.
    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:
        - Allows you to copy/paste text from a separate document, like Word, onto this text editor.
        - A line break is identified by a capital letter that starts a new sentence. (Figure 18)
        - Every line break represents a new row in the Key Responsibilities section. (Figure 19)

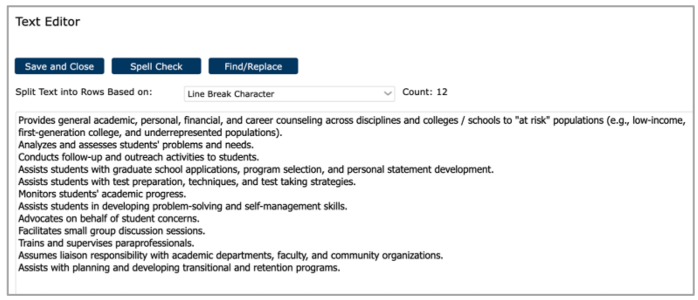



Figure 18: Paste List

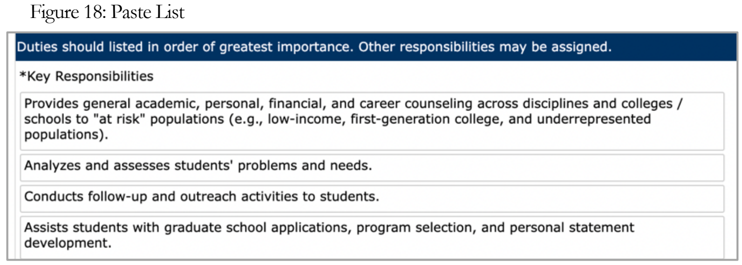



Figure 19: How "Paste List" Looks Like as a Row

    f. Search (Content Search), more info can be found on page 13
        - Content Search can be used to provide relevant existing information in the database that can be applied to the blank job description template.
        - 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 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)**

1. 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 to as a reference when editing the KSAs section.
2. 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:
        - Allows you to copy/paste text from a separate document, like Word, onto this text editor.
        - A line break is identified by a capital letter that starts a new sentence. (Figure 20)
        - Every line break represents a new row in the Key Responsibilities section. (Figure 21)

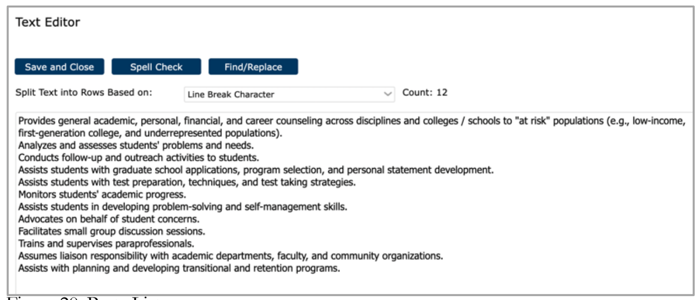



Figure 20: Paste List

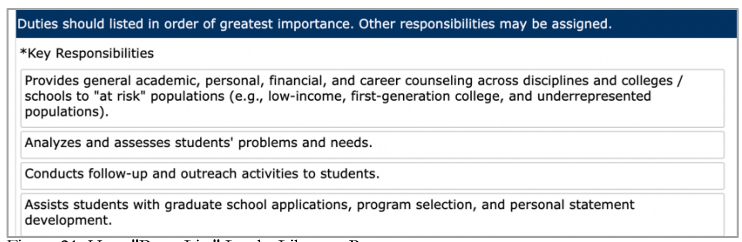



Figure 21: How "Paste List" Looks Like as a Row

- Search (Content Search), more info can be found on page 13
    - Content Search can be used to provide relevant existing information in the database that can be applied to the blank job description template.
    - 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 Key Responsibilities you'd like to add to the JD. Click on Add to Job when you are finished selecting the Key Responsibilities

# HR Library

- This section allows HR Partner users to find and view job descriptions across campus.
- If you need access to edit/revise JDs in additional departments, please email compdesk@berkeley.edu

  ***Note:** This will eventually be limited to showing JDs across respective region.

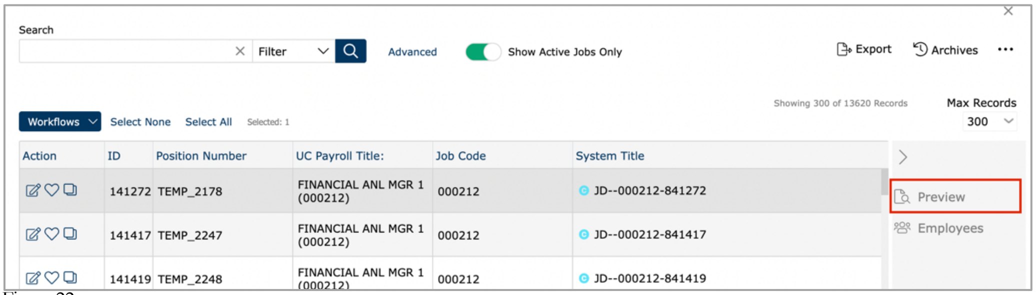


Figure 22

1. This Quick Link automatically has "Job Descriptions Requiring My Review" checked. Uncheck this to view all JDs available in the HR Library.
2. You can search by 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.
  - Copy: allows you to copy a JD.
- Select a Job, on the right panel (click the carrot icon), there will be: (Figure 22)
  - 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.

## 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 23)
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).**

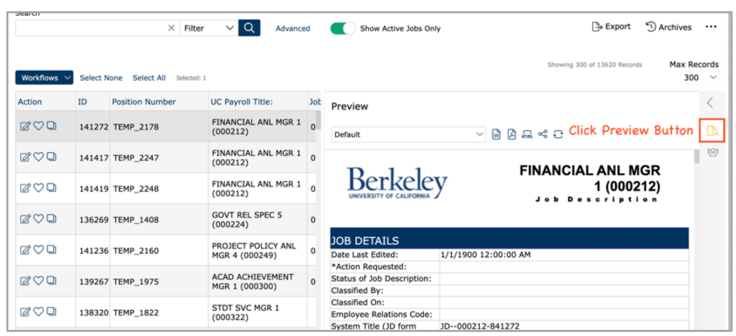


Figure 23

## 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!
    - **Tip:** Search by Last Name,First Initial. 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.
6. You can view the progress of this workflow through the "My Job Tasks" Quick Link.

# 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.
- Note: Please use caution when selecting a JD to revise (ensure the JD selected is the appropriate description).

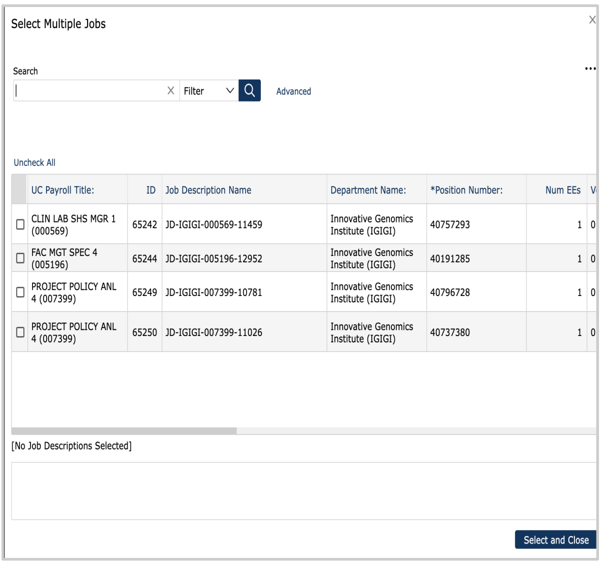


Figure 24

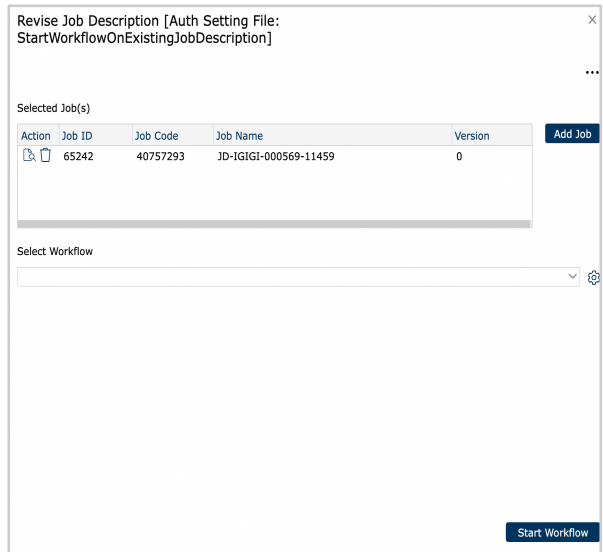


Figure 25

## To Revise a Job:

1. Click Add Job
2. Check the boxes on the left for the jobs that you would like to revise. (Figure 24)
    a. You can use the Search Bar to search by Position Number, Form Name, etc. or Filter
3. Select the job you'd like to revise. Then click Select and Close
    a. The pop-up screen will display the selected job(s) along with some functions. (Figure 25)
    - Actions:
        - View: opens the Job Template in a non-editable form.
        - Delete: allows you to remove Job Description from the revised list.
4. **Select Workflow** from the drop-down menu. There is additional information available in the Workflows section of this User Guide.
5. Select participants for each step in workflow. Remember to include yourself in the first step!

- Tip: search for participants by **last name,first initial with no space.** (ex: Doe,J)
- 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.

9. 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

- There are various workflows to choose from:
  1. Add Position Number to JD (1 step)
  2. Employee to Manager (2 steps)
  3. **Formal Classification Review, MGR to HRP to COMP (3 steps)** – Most common
  4. HR Partner to Compensation Consultant (2 steps)
     a. Note: the workflow is only available to HR Partners
  5. Minor Update to JD (1 steps)
     a. Note: this workflow is only used for JD's that are in Classified status
  6. Preliminary Review, MGR to HRP (2 steps)

## 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 26)

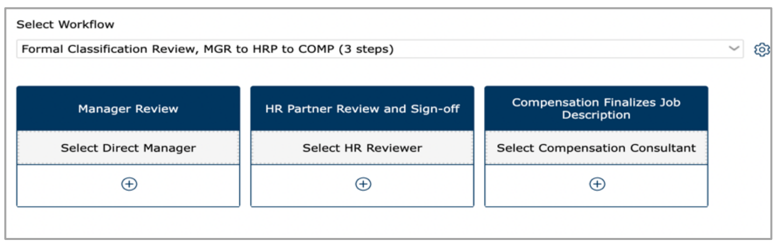



Figure 26

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!
   1. Tip: search for participants by **last name,first initial with no space.** (ex: Doe,J)
   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 27)

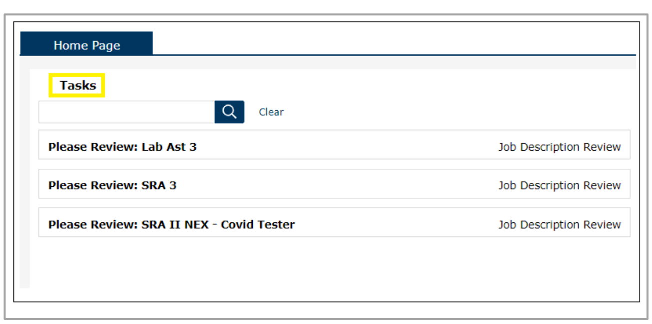
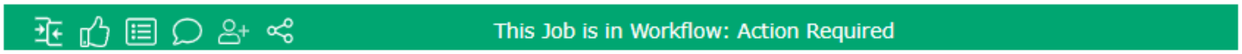



Figure 27

# General Directions for Editing a Job Description

1. ***NOTE:** 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
   - Mark the Current Workflow Step as Complete (*Only appears for the second participant that was added under the same role, i.e. the second Direct Manager that was added).
   - Return/Reject Current Workflow Step. (*Only appears after first step of workflow has been approved).
   - 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 workflow 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.
4. As you are editing the Job Description, **please remember to click Save on the bottom of the screen to save progress.**
   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. More information about returning a step **(thumbs-down icon)** /marking step as completed **(checkmark icon)** can be found on page 21.
6. A pop-up showing "Approve Workflow Step" will allow you to send an email to the next step approver. (See page 22)
   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. (See page 20)
   c. Participants will open the Job Review Task on their Home page and make edits as needed and approve when appropriate.
8. 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.

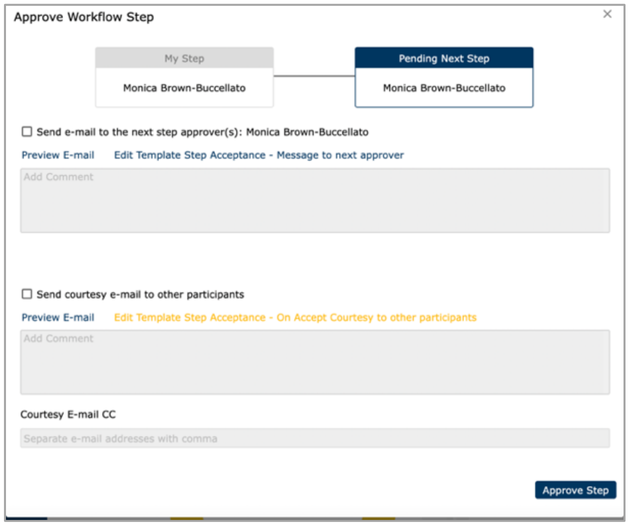



Figure 28: Step Approver Pop-up

e. **Final Step Approvers**: click **Finalize Workflow** to complete the task

- 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 Approved. Approved Job Descriptions are marked with "True" under the Approved status on other Quick Links. To view if a JD has been Classified by the Compensation unit, open the JD. Under the Job Details section, review the Status of the Position Description field.

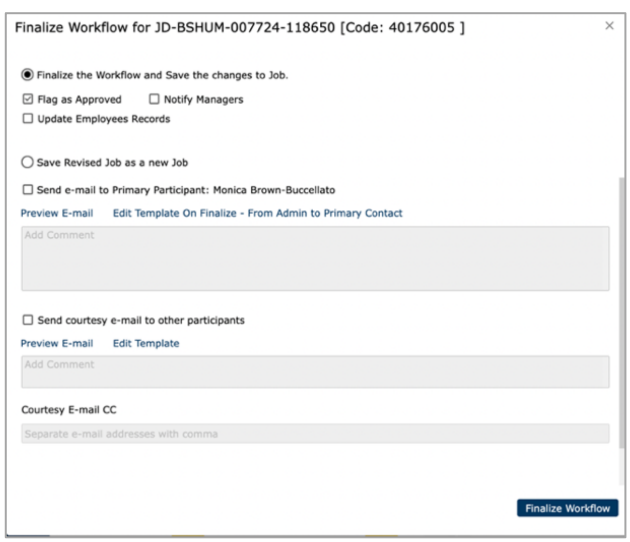



Figure 29: Final Step Approver Pop-up

## 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.

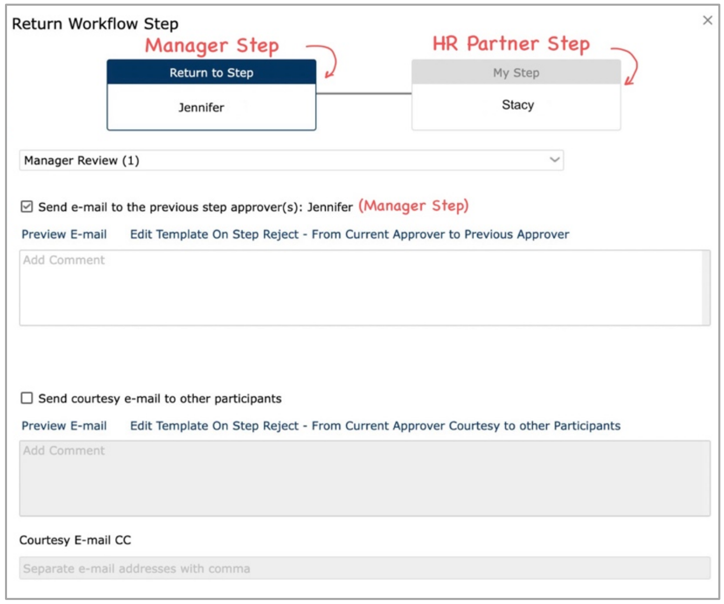


Figure 30: Return Workflow Step

## Marking Workflow Step as Complete

- Additional participants added to each step in workflow have the option to mark the workflow as "completed" by clicking the checkmark icon in the green banner.
- 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.
   In this case, Monica, the additional participant in the Manager step in workflow, is sending Manager Jennifer, the primary approver of this step in workflow, an email.
   a. You can Cc additional participants by including their email in the CC row.
3. Click Send Email to complete the action.

Figure 31: 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 32)
   - 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**
   - Users can only add/replace participants if they are part of that step in workflow.
   - Grey Boxes (Figure 32)
     - Add Participant: add additional participants if needed.
       *Note: you may only add participants to the step in workflow that you are a part of
     - 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 32

## Deleting a Workflow

- ***Deleting a Workflow will delete any edits made to the JD while the JD was in that workflow**
    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 the workflow.
    3. Find the JD in the Department Library and start the correct workflow.
- Admin, Compensation, and HR Partner user roles can delete workflows.
- Only Admin can delete JDs.
- Email [compdesk@berkeley.edu](mailto:compdesk@berkeley.edu) for additional assistance in deleting workflows/JDs.

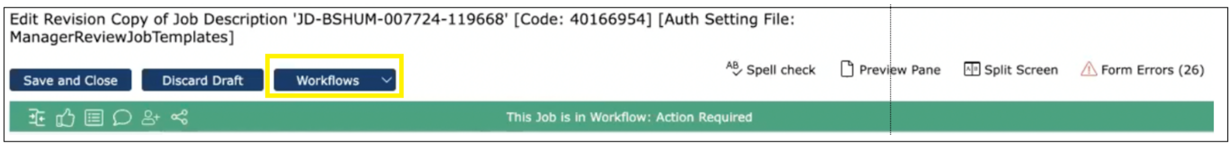


Figure 33: Workflow Details

1. Click Workflows and then click **Workflow Details** to view the audit trail of the Workflow. (Figure 33)
2. Click the three dots located on the right side of the screen. Select **Delete Workflow.**
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 34)
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.**

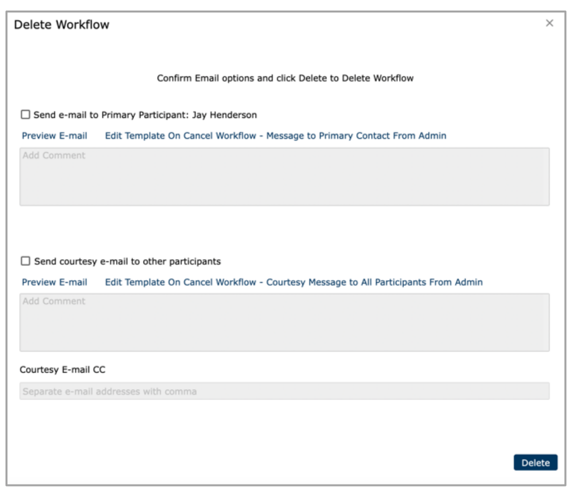


Figure 34: Notify Participants of Deletion via Email

## Comparing Between Different Versions of the JD Template

1. Under the Green Bar, click on the first icon to compare between the old version and the new version of the Job Description.
2. You can either view the changes as:
   a. Merged Changes or

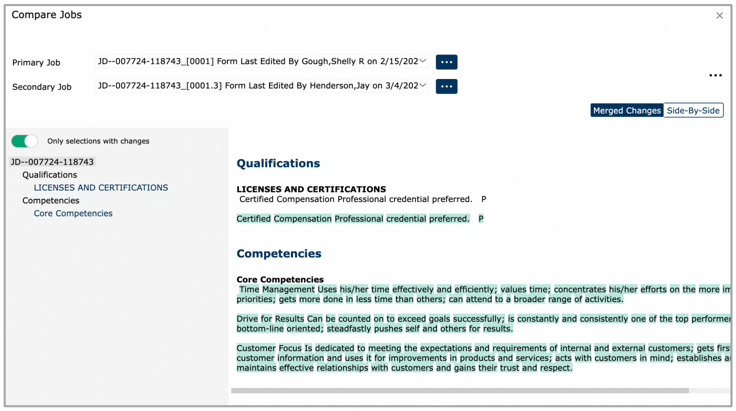



Figure 35

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


Figure 36

# My Job Tasks

- Allows users to **view any JD that's in 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 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.

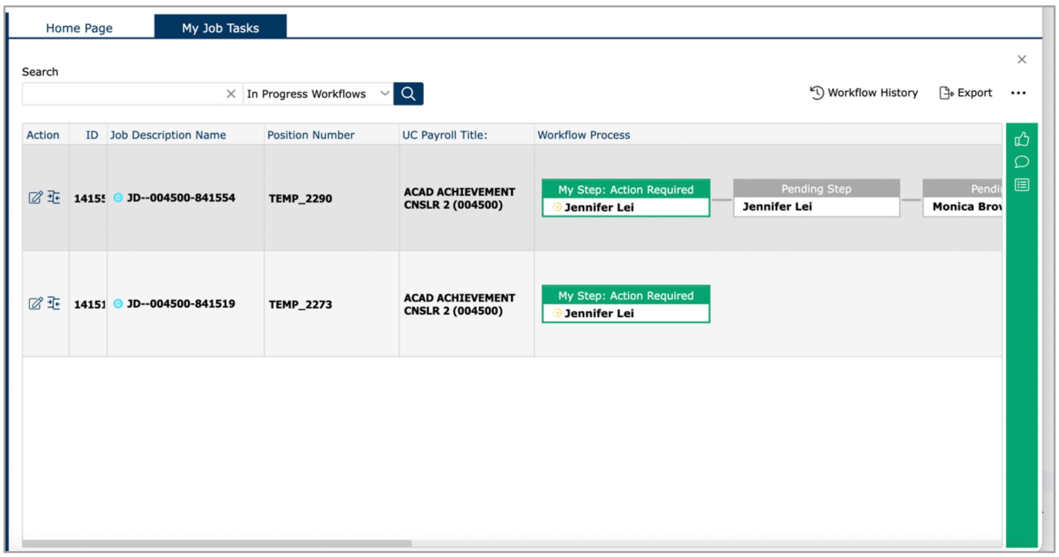


Figure 37

1. You can Search for any JD that you'd like to view.
2. Actions:
   - Edit: Double click a JD to start editing.
   - Compare: compare between the old version and the new version of the JD. See more [here](#).
3. Workflow Process: lists all participants that are a 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.
4. Green Side Bar: located on the right-hand side of your screen
   a. Approve step: allows you to approve you step in Workflow
   b. 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
   c. Workflow Details: see more details on [Workflow Details](#)
      - Allows you to see a detailed view on 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.

# 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 in the JDX platform. (Figure 38)
  - "Classified" then a Compensation Consultant in UCB People and Culture has reviewed and classified the job description. (Figure 39)

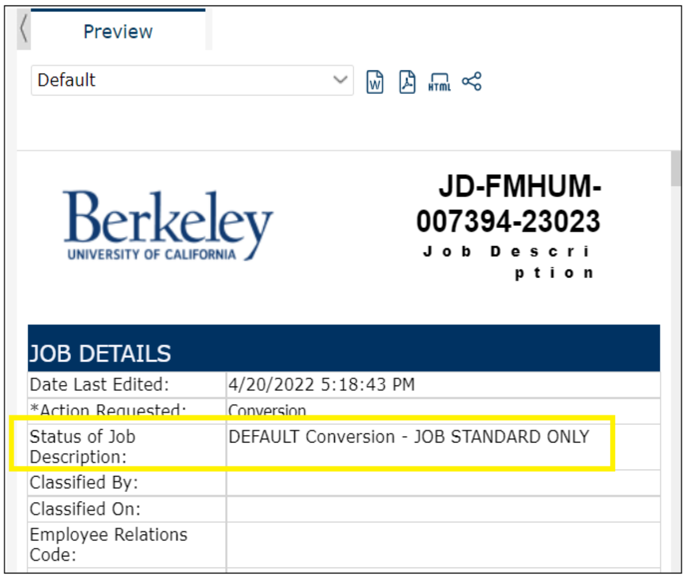



Figure 38

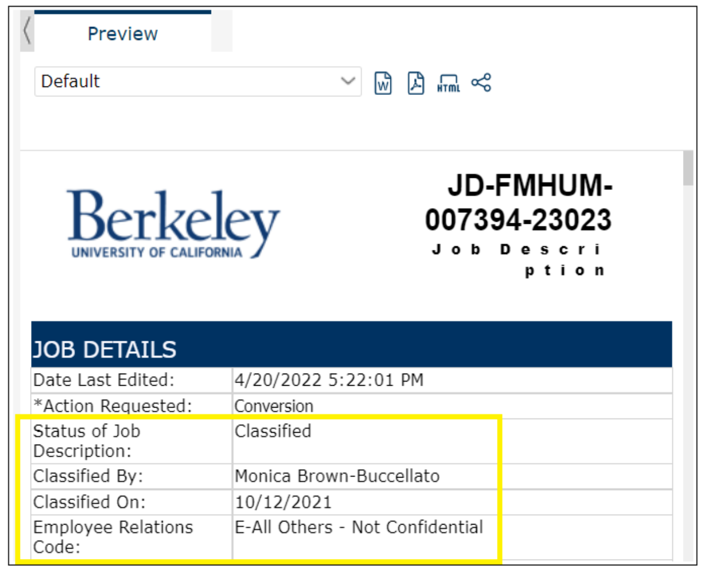



Figure 39

- ***Word/Adobe PDF is the recommended way to download the JD.**
- Ability to Download/Share Job Description in a variety of formats:
  - **Word**
  - **Adobe PDF**
  - HTML (Not recommended)
  - Share via link (Not recommended)

# 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: 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
- Upload Attachments: available once JD is in workflow

2. ***Overview**
    a. Job Summary
    - Working Title: auto-populates, editable
    - *Job Summary: editable
    - Generic Scope: auto-populates, non-editable
    - For Reference Only – Custom Scop from Job Standard: auto populates, noneditable
    - *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 (Need minimum of 4, max. 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. *Knowledge, Skills and Abilities: required, editable
        i. Indicate which KSAs are Required vs Preferred
    b. Education: auto-populates, editable
        i. User can add additional education
    c. Licenses and Certifications: editable
    d. Additional Licenses and Certifications: editable
    e. 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)

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
13. HR/Comp Approvals – Compensation will edit
    a. Classification Decision: any details about the classification decision approval/denial can be included here
    b. Comp Team Notes (visible by Comp. only)
    c. 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
    d. ServiceHub Case/Task: this can be used to manually input the HRC or HR Task # from ServiceNow
    e. HR Partner Notes (visible by HR Partners and Comp. only)
    f. General Notes: editable
    g. Attachment
14. Compensation Information: visible to Compensation

**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