

# JOB BUILDER

## **JDXpert User Guide**

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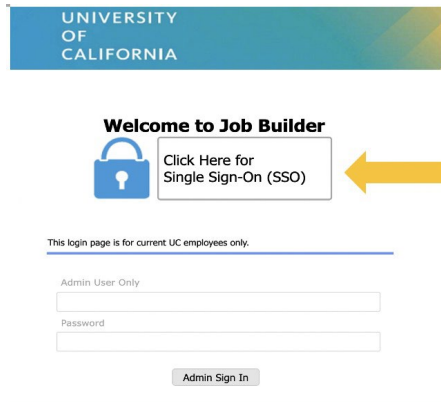
*Note: This User Guide is being updated weekly during implementation of this new system. Please continue to visit the P&C website for the most updated version.*

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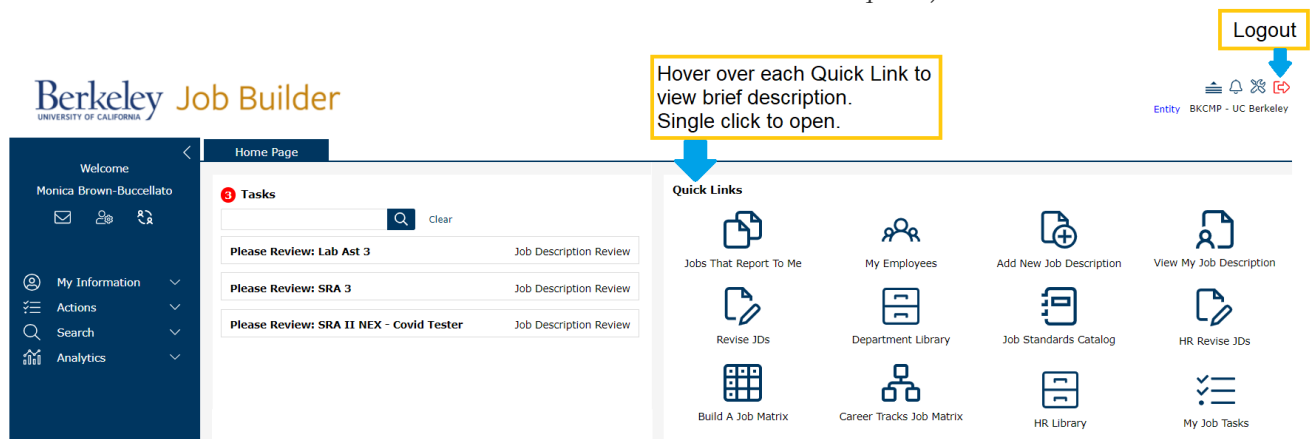
**Rev. 2 04/2022**

# Job Builder (JDXpert)

<https://universityofcalifornia.marketpayjobs.com/frmMainV2.wgx>



- System powered by JDXpert & MarketPay Jobs.
- Tool for managers to use when preparing and 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**.
- ❖ (Managers/Supervisors) To update an existing job description select **Jobs That Report to Me** or **Revise JDs**.
- ❖ (Managers/Supervisors) To view job descriptions of your Direct Reports select **Jobs That Report to Me** or **My Employees**.
  - 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 JD select **HR Revise JDs**.















**Question?** Email UCB's Compensation team at [compdesk@berkeley.edu](mailto:compdesk@berkeley.edu)

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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 and start editing a JD in this list. (Be sure to complete the Action Requested field in Job Details).</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)
 My Employees	View a list of the employees that report directly and indirectly to you. This section allows the user to edit JDs that report into them.	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 that may result in a reclassification of the position. (Be sure to complete the Action Requested field in Job Details).	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 can be helpful when a JD is without a Position Number and/or does not have an Active Employee in the job).	Users with one or more Direct Reports (i.e. Managers and Supervisors)
 Add New Job Description	This function allows you to create a new job description. JDXpert offers the Search Library function that can be found throughout different sections when editing a new job description. These job descriptions can be saved in the system and be retrieved later.	Users with one or more Direct Reports (i.e. Managers and Supervisors)
 HR Library	<p>Allows HR Staff to find and view job descriptions across campus.</p> <p>Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email <a href="mailto:compdesk@berkeley.edu">compdesk@berkeley.edu</a>.</p> <p><b>*This Quick Link is being updated to filter by Departments in each Region</b></p>	HR Partners
 HR Revise JDs	<p>Allows HR Partners to initiate a workflow for job descriptions across campus that may need to be revised and/or updated.</p> <p>Note: If you are an HR Partner on campus and do not have access to this Quick Link, please email <a href="mailto:compdesk@berkeley.edu">compdesk@berkeley.edu</a>.</p> <p><b>*This Quick Link is being updated to filter by Departments in each Region</b></p>	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	My Job Tasks: view the tasks that have been assigned to you. This Quick Link will not show in your view if you do not have any active jobs in workflow that you are a part of.	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.

Home Page **Job Standards Catalog**

All Job Families    Selected 1 of 11

☐ Search Results Only

- Security and Public Safety
- Skilled Crafts and Trades
- Sports and Recreation
- Student Health Services
- Student Services
  - Academic Achievement Cnslng
  - Admissions and Recruitment
  - Career Services
  - Curriculum Planning
  - Financial Aid
  - K to 14 Academic Preparation
  - Legal Services
  - Proctoring
  - Registrar
  - Residence
  - Student Academic Advising
  - Student Academic Support
  - Student Disability Services
  - Student Life and Development
  - Student Services Advising

System Title	UC Job Code	Job Family
STDT SVC ADVISOR 1 (004573)	004573	Student Services
STDT SVC ADVISOR 2 (004574)	004574	Student Services
STDT SVC ADVISOR 3 (004575)	004575	Student Services
STDT SVC ADVISOR 4 (004576)	004576	Student Services

**STDT SVC ADVISOR 2 (004574)**

**Job Code:** 004574

**Job Title:** STDT SVC ADVISOR 2 (004574)

**Job Category:** Professional

**Job Level:** Intermediate

**Job Family:** Student Services

**Job Family Description:** These functions describe the work at the University involved in helping various student services such as recruitment, admissions, academic and student counseling, financial aid and career services.

**Job Function:** Student Services Advising

**Job Function Description:** Involves a wide range of student services duties and responsibilities for an academic department / school / college or organization. Provides assistance to the dean / chair, faculty, and students in academic advising, recruitment, admissions, financial aid, visa / immigration matters, the evaluation and awarding of fellowships and block grant funds, student orientation and events, career counseling, and related programs.

Figure 1

## To Search for Job Standard by Job Family:

1. The Search Bar allows you to search by Job Family, Function, and Job Title.
2. The drop-down menu labeled “All Job Families” gives a full list of the UC Job Families
3. Use the carrot on the left side of the screen (Figure 1)
  - Displays a drop-down list of all Job Families and specific Job Functions.

**Grey Chart:** displays all of the Job Titles in the Job Family/Job Function selected (Figure 1)

1. Use the scroll bar on the bottom to see additional information including Job Sub Family, Job Level, etc.
2. You can use the arrows on the bottom to jump to different pages in the Job Standards Catalog
3. Click on the Job Title you want to view the Job Standard for

The right-hand side displays a detailed view of the Job Standard selected

# 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

	COMM MGR 1 (000408)	COMM MGR 2 (000409)	COMM SPEC 4 (005887)	COMM SPEC 5 (005921)
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 MGR 1 (000408)	COMM MGR 2 (000409)	COMM SPEC 4 (005887)	COMM SPEC 5 (005921)
Job Code	000408	000409	005887	005921
UC Payroll Title	COMM MGR 1 (000408)	COMM MGR 2 (000409)	COMM SPEC 4 (005887)	COMM SPEC 5 (005921)
Job Category	Supervisory and Management	Supervisory and Management	Professional	Professional
Job Level	Manager 1	Manager 2	Advanced	Expert
Job Family	Job Family: Communications	Job Family: Communications	Job Family: Communications	Job Family: Communications
Job Family Description	Sub-Family: General Communications. These functions describe the various modes of communication used at the University and by various components of	Sub-Family: General Communications. These functions describe the various modes of communication used at the University and by various components of	Sub-Family: General Communications. These functions describe the various modes of communication used at the University and by various components of	Sub-Family: General Communications. These functions describe the various modes of communication used at the University and by various components of
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

Figure 3

## Get Started:

- Under Select Job Function, click (Figure 2)
- The icon will show a list of all the Job Families.
- Click the “ ” icon on the left to show specific Job Functions listed under each Job Family.
- Select the Job Function that you would like and click **Select and Close**
- You can either
  - Click **View Side-By-Side**
    - Displays all Job Standards across a Job Function (Figure 2)
  - Click **Download Job Standards**
    - 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)
- After you click View Side-by-Side, you can:
  - Reset: resets the Career Tracks Job Matrix
  - Export as Excel: downloads an Excel file that displays selected Job Titles information (Figure 3)
    - \*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
  - Highlight Differences: marks the differences between Job Standards
  - 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:

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

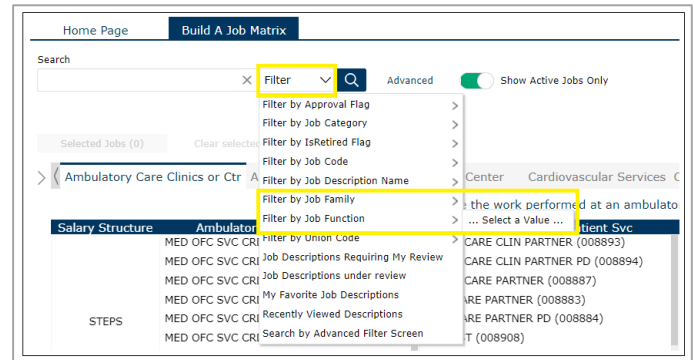


Figure 4

## General Steps for Building a Job Matrix

1. After Searching for a Job Family, select Job Standard(s) listed in the grey rows. You can select multiple Job Standards by holding Ctrl/Command when selecting
4. Click on **Selected Jobs** to view the Job Standards and compare. (Figure 4)
5. Once you've selected the job titles you want to compare, Click **Side-By-Side**

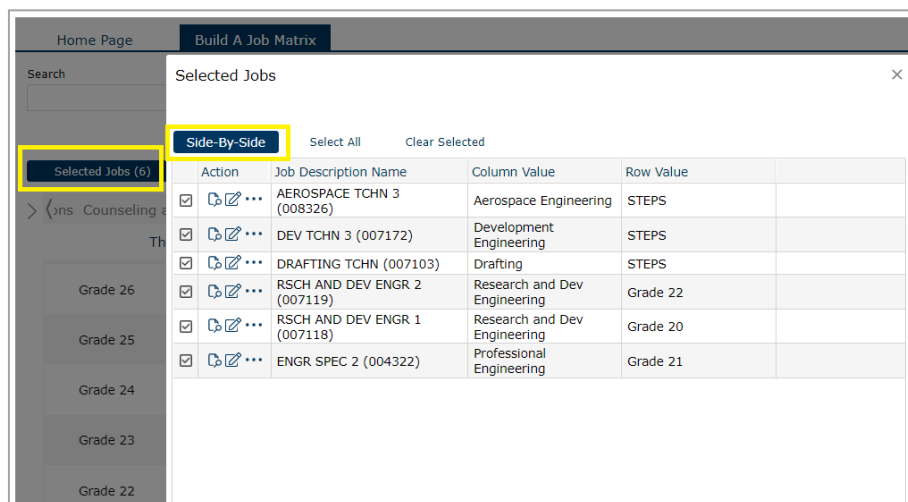


Figure 5



## 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: reset the chart
  - Export as Excel: download 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) <span>×</span>	DEV TCHN 3 (007172) <span>×</span>	DRAFTING TCHN (007103) <span>×</span>
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	<b>Job Family:</b> Engineering <b>Sub-Family:</b> Aerospace Engineering	<b>Job Family:</b> Engineering <b>Sub-Family:</b> Development Engineering	<b>Job Family:</b> Engineering <b>Sub-Family:</b> 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 6

# Jobs that Report to Me



- View Job Descriptions of your Direct and Indirect Reports. 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”)
- 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)
- Side-By-Side** Use Ctrl key to select and highlight multiple JDs – this displays jobs in columns in comparison to one another \*See pg.7
- Actions:
  - Opens the job description in view only.
  - View the employee that encumbers this job
  - Set as favorite (Later you can Filter by My Favorites to find these JDs easier)

Action	Job Description Name	Status of Position Description	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 7

## To Revise a Job Description

- Click & select the job that you would like to revise (highlights the job row in grey. See Figure 8)
- Click on the Workflow button and Start Workflow. Choose between the options. There is additional information available in the Workflows section of this User Guide.
- Choose the participants for the chosen workflow and click Start Workflow
- The Job Description Review task will appear in the Task Bar on the home page for each participant

Action	Job Description Name	Status of Position Description	Position Number	Employee Name:	UC Payroll Title:	Job Code	ReviewStatus
	JD--70000		DEFAULT				No Active Workfl
	JD-FMHUM-007394-23023	DEFAULT Conversion - JOB STANDARD ONLY	40151006		ORGANIZATIONAL CNSLT 3 (007394)	007394	Revisions pendin HR Approval
	JD-FMHUM-007583-16479	Classified	40170014		BUS SYS ANL 2 (007583)	007583	Revisions pendin HR Approval
	JD-FWHHS-000333-16596	Classified	40149704		TRAINER 5 (000333)	000333	No Active Workfl
	JD-FWHHS-000562-15478	Classified	40192124		ORGANIZATIONAL CNSLT 4 (000562)	000562	No Active Workfl
	JD-FWHHS-000562-16591	Classified	40144719		ORGANIZATIONAL CNSLT 4 (000562)	000562	No Active Workfl
	JD-FWHHS-000562-16593	Classified	40159641		ORGANIZATIONAL CNSLT 4 (000562)	000562	No Active Workfl

Figure 8

# My Employees

- View a list of the employees that report directly and indirectly to you

Home Page **My Employees**

Search  **Filter**  ☐ Direct Reports Only **Org Chart**   ...

**Job Tasks** ▼

Action	Emplid	Employee Name	System Title	Supervisor's Name	Job Code	Position Number
	104	Petros	JD-IGIGI-000569-11459	Ringeisen, Bradley R	000569	40
	105	Audrey R	JD---70000	Ringeisen, Bradley R		DEFAULT
	101	Ariana R	JD-IGIGI-005196-12952	Ringeisen, Bradley R	005196	40
	104	Melinda	JD---70000	Ringeisen, Bradley R		DEFAULT
	100	Gabriel	JD---70000	Ringeisen, Bradley R		DEFAULT

Tree View

- Bradley
  - Petros**
  - Audrey
  - Ariana**
  - Melinda**
  - Gabrie**

Figure 9

- Actions:
  - Employee details: allows you to view employee information such as Emplid
  - View job allows you to:
    - View job: opens Job Description
    - Preview job: opens a print view of the Job Description
  - Share Job with Employee: Share via link. You can also set an expiration date
- On the right side, you can click on the carrot to display (Figure 9)
  - Tree view: displays a chart of employees under the manager's role & **bolds** the names of employees who also have direct reports (i.e. indirect reports)

# 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.
  - (Note: If you update a job description for **Reclassification**, please ensure the **Action Requested** field on the template is set to **Reclassification**, the **Reclassification Questionnaire** is completed, and that you select the **Formal Classification Review workflow**).
- ▶ Allows users with one or more Direct Reports to revise an existing job description within their department. This can be used for updating vacant or encumbered job descriptions. 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.

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 10

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

Figure 11

## 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 10)
  - a. You can use the Search Bar to search or Filter for specific jobs in your department
  - b. The selected jobs will auto-populate on the bottom of the screen
3. Click **Select and Close**
  - a. The pop-up screen will display the selected job(s) along with some functions (Figure 6)
    - Action
      - 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 3 Workflows from the drop-down options, add appropriate participant(s) to each step of the workflow, then select **Start Workflow** (Figure 11)
5. The Job Description Review task will appear in the Task Bar on the home page for each participant
  - a. Double click to begin revising the Job Description

# 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.

The screenshot shows the 'Department Library' interface. On the left is a dark blue sidebar with a 'Welcome Jennifer' header and navigation links: My Information, Actions, Search, and Analytics. A 'Quick Tips' section is at the bottom of the sidebar. The main content area has a 'Home Page' and 'Department Library' tab. It features a search bar, a 'Filter' dropdown, and a 'Search' button. Below the search bar, there are 'Active Filters' (Recently Viewed Descriptions) and a 'Clear All' link. A 'Workflows' dropdown is set to 'Select None'. The table below has columns: Action, Position Number, Job Code, ID, and System Title. The table contains three rows of data, each with a heart icon in the Action column.

Action	Position Number	Job Code	ID	System Title
♥	40166954	000613	111664	Test Comp Anl 4 mb Test JD
♥	40176005	007724	111650	TESTER Comp Anl 1 Test JD
♥	40166954	007724	112668	testing AGAIN mb Comp Anl 1

Figure 12

1. Users can Favorite a JD by selecting the heart icon under the Left Action column (and can later use the Filter by My Favorites to easily find these JDs).
2. Select a job, on the right panel, there will be:
  - a. Preview: allows you to see the print version of the Job Description.
  - b. Employees: allows you to see employees assigned to this Job Description.

# Add New Job Description



- ▶ This function allows you to create a new job description.
- ▶ 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 13

## Add a New Job Description:


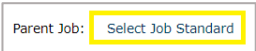

1. Select 
  - a. Blank Job: allows the user/JD initiator to view the content of the job standard template they're selecting.
  - b. Base Job: does not allow you to select Job Standard
2. Click 
  - a. Job Standard: list of job titles with template descriptions.
3. Click on the  icon located to the right of the Job Standard field to browse Job Standards (Figure 14)

Figure 14

4. Use the Search Bar to search for the appropriate Job Standard. There is also an ability to also use the Filter function if desired
5. Click to select & highlight the Job Standard you would like to use and click **Save as Job Description** then click **Save and Close**

Figure 15

6. Input a temporary “New Job Title” into the blank text box (Figure 15)
7. Select Workflow (by choosing between the options listed, Figure 15)
  - a. Start the Workflow to have the Review Job Description task auto-populate under Tasks on your home page
  - b. Note: Steps of Workflow must be filled in with the appropriate participants before the JD will appear in the Task Bar on the home page
  - c. Double click the task to start Editing the Job Description
8. Go through the template and edit sections as required. Click Form Errors on the top right to view incomplete sections that are required to be completed. (Figure 16)
  - a. **Remember to click Save on the bottom (to save progress) or Save and Close on the top to save your work.**

Figure 16

## 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 Blank Jobs Descriptions Templates

## Content Search Options via Smart/Detailed/Specific Search

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

- Smart Search:** returns individual job characteristics across selected Job Family (Fig. 17)
  - The Search Bar will auto-populate by Job Title. The bottom of the search bar are suggested JDX jobs similar to the job standard you selected previously.
  - Ability to select multiple descriptions that match your job
  - A special feature is the ability to click on “More Like This” “More Like This.” It will give you similar variations of the Knowledge, Skills, and Abilities.

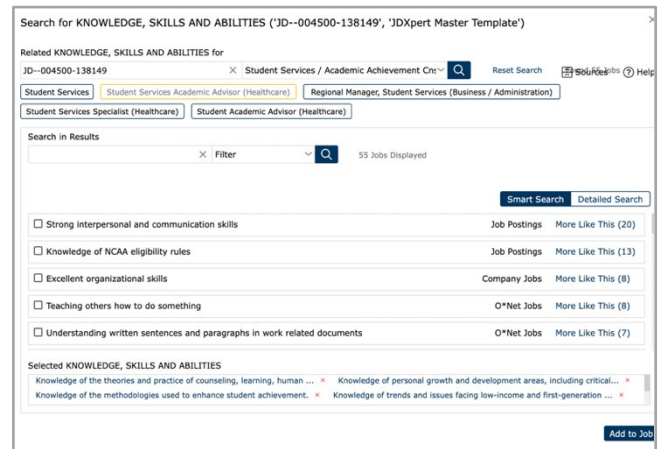


Figure 17: Smart Search

- Detailed Search:** categorizes job characteristics by individual Job Functions and Key Responsibilities (Figure 18)
  - 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.
  - 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. 17/18)

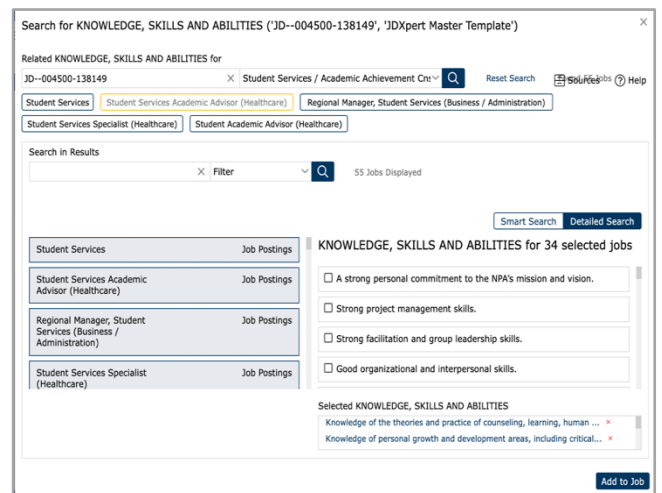


Figure 18: Detailed Search



- In both Smart Search and Detailed Search, there is an additional search bar “Search in Results”
  - For example, you can search a specific action verb such as ‘analyze’ to see examples of how this word has been used in other sample descriptions
- 3. When you are finished highlighting all the descriptions that you like, click **Add to Job** on the bottom right
- 4. Additional way to search specifically under **Key Responsibilities**, you can search for a description when adding a new row
  - a. Click Add New Row under Key Responsibilities. A magnifying glass icon will pop up on the right

The screenshot shows a table with 12 rows of key responsibilities. Each row has a magnifying glass icon in the right margin. At the bottom of the table are two buttons: "Add New Row" and "Manage Rows".

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).	0	
Analyzes and assesses students' problems and needs.	0	
Conducts follow-up and outreach activities to students.	0	
Assists students with graduate school applications, program selection, and personal statement development.	0	
Assists students with test preparation, techniques, and test taking strategies.	0	
Monitors students' academic progress.	0	
Assists students in developing problem-solving and self-management skills.	0	
Advocates on behalf of student concerns.	0	
Facilitates small group discussion sessions.	0	
Trains and supervises paraprofessionals.	0	
Assumes liaison responsibility with academic departments, faculty, and community organizations.	0	
Assists with planning and developing transitional and retention programs.	0	

Figure 19

- b. When clicked, it will open a search bar pop-up which will allow you to find descriptions matching any keyword you search

The screenshot shows a "Search Content Library" pop-up window. It has a search bar at the top with the text "Assists with planning and developing transitional and retention programs." and a magnifying glass icon. Below the search bar are three buttons: "Direct scholarship, fellowship, and loan programs, performing activi...", "Assists with planning and developing transitional and retention prog...", and "Assists in recruiting students, and with activities directed toward ...". Below these buttons is a "Search in Results" section with a filter dropdown and a magnifying glass icon. The results section shows a list of 100 key responsibilities, with the first few rows visible. The second row, "Assists with planning and developing transitional and retention programs.", is highlighted in yellow. The right side of the results section shows a list of job types: "O\*Net Jobs", "Company Jobs", "Crowd-Sourced Jobs", "Sample Jobs", "Job Postings", and "Job Postings". At the bottom right of the window is a "Save and Close" button.

Figure 20

# HR Library



- ▶ This section allows HR Partner users to view job descriptions across campus.
- ▶ This section can be used to search by Position Number, Job Code, System Title (also known as PD Form Name), UC Payroll Title, and more).

Home Page

HR Library

Search

X

Filter

Q

Advanced

Show Active Jobs Only

Export

Archives

Workflows

Select None

Select All

Selected: 0

Showing 300 of 3649 Records

Max Records 300

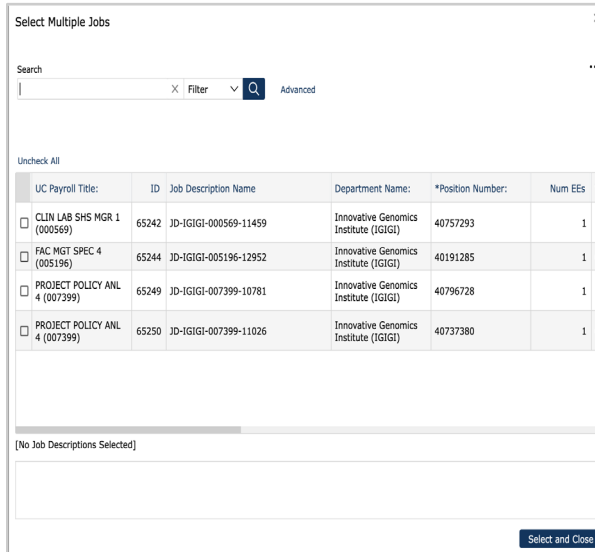
Action	Position Number	Job Code	ID	System Title	UC Payroll Title	Status of Position Descri	Approved	Active EEs	Version
	40160401	007377	65403	JD-BAHSB-007377-11545	(007377)	Classified	True	1	0
	40161061	006148	65398	JD-BAHSB-006148-10042	INSTRUCTIONAL DESIGNER 3 (006148)	Classified	True	1	0
	40161266	006207	65322	JD-AZDSR-006207-15139	RSCH ADM 4 (006207)	Classified	True	1	1
	40164289	004722	65365	JD-ALPDC-004722-13367	BLANK AST 3 (004722)	Classified	True	1	0
	40164729	004722	65437	JD-FVAUX-004722-13419	BLANK AST 3 (004722)	Classified	True	0	0
	40165239	004167	65334	JD-LCIES-004167-15138	PUBL EDUC SPEC 2 (004167)	Classified	True	1	0
	40165326	005195	65223	JD-CDCDN-005195-11602	FAC MGT SPEC 3 (005195)	Classified	True	1	0
	40165340	005194	65266	JD-MACFS-005194-13157	FAC MGT SPEC 2 (005194)	Classified	True	0	0
	40165823	004722	65255	JD-KPADM-004722-11572	BLANK AST 3 (004722)	Classified	True	1	1
	40165823	004722	65256	JD-KPADM-004722-11604	BLANK AST 3 (004722)	Classified	True	0	0
	40166039	000522	65374	JD-BAHSB-000522-11548	TCHL PROJECT MGT PROFL 4 (000522)	Classified	True	1	0
					CARFER SVC SPEC 3				

1 / 3

1. Users can Favorite a JD by selecting the heart icon under the Left Action column
2. This section is for HR Partners to View Only.
3. To initiate a JD into the workflow, go to HR Revise JDs (see next page)

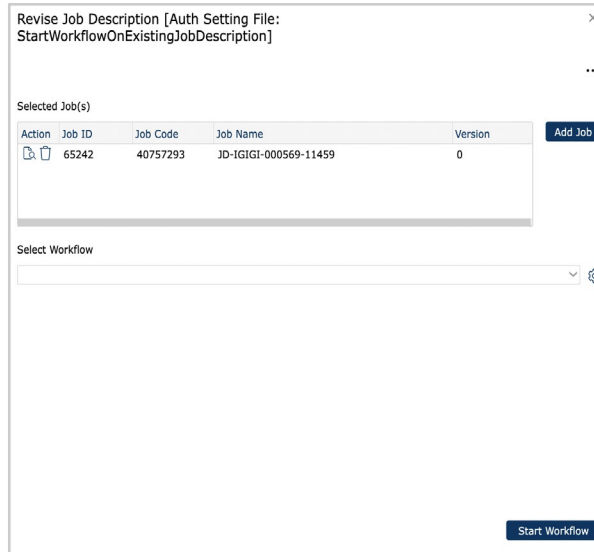
# HR Revise JDs

- ▶ 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)



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 22







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

Figure 21

## To Revise a Job:

1. Click **Add Job**
2. Check the boxes on the left for the jobs that you would like to revise (see left image)
  - a. You can use the Search Bar to search or Filter for specific jobs
  - b. The selected jobs will auto-populate on the bottom of the screen
3. Click **Select and Close**
  - a. The pop-up screen will display the selected job(s) along with some functions (see image)
    - Action
      -  View Job: allows you to view the Job Template, not editable
      -  Delete: allows you to remove Job Description from the revised list
4. Select Workflow from the drop-down options, add appropriate participant(s) to each step of the workflow, then select **Start Workflow**
  - a. HR Partners have one additional workflow called HR Partner to Compensation Consultant (2 steps) that they can select. This workflow can be used if the Manager/Supervisor has already previously reviewed and updated a JD.

# Workflows

- There are various workflows to choose from:
  - Employee to Manager (2 steps)
  - **Formal Classification Review, MGR to HRP to COMP (3 steps) – Most common**
  - HR Partner to Compensation Consultant (2 steps) Note: the workflow is only available to HR Partners
  - Preliminary Review, MGR to HRP (2 steps)

## General Steps for Starting a Workflow

1. Select between the 3 Workflows. Depending on the workflow, there will be blue boxes listed underneath that you need to fill out with the designated participants (Figure 23)

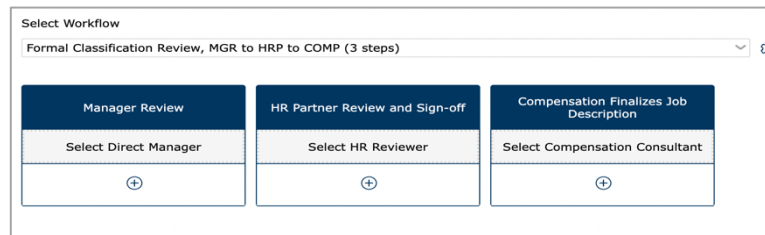


Figure 23

2. Select Participant by using Search Bar and filters
  - a. If the Participant is not in the System, click Employee Not Listed and add manually with their email and full name
  - b. If you have trouble finding the employee's name, please email [compdesk@berkeley.edu](mailto:compdesk@berkeley.edu) for assistance.
3. Click Add Participant
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 24)

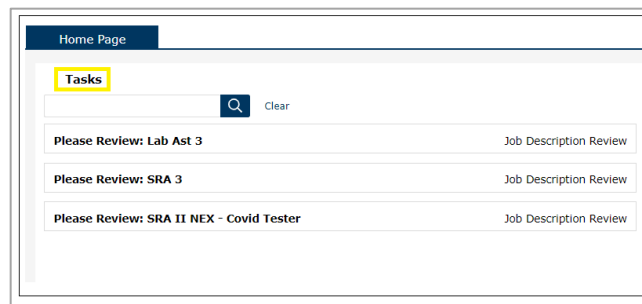
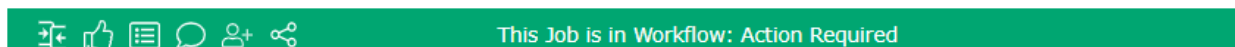


Figure 24

## General Directions for Revising a Job Description

1. Under Tasks, double click “Please Review...” to open the Job Template for revisions. Double click to view the Job Template. Make necessary edits throughout the Job Description Template.
2. 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 (capitalize)
  - Approve Current Workflow Step
  - Return/Reject Current Workflow Step
  - Show Workflow status for the Job Description. Accept/Reject step if applicable
  - Show All Comments for this Workflow
  - Invite another user to edit this Job Description (capitalize)
  - Share Revision Workflow through a link
3. Workflows Button: located on the top of the screen allows you to access Workflow Details and Workflow History
    - a. Workflow Details: lists the audit trail for the Workflow
    - b. Actions:
      - Save and Close
      - Approve: approves the current step and the workflow automatically routes the JD to the next step in the workflow.
      - Return: return to the previous step approver. (This option only becomes available after the first step of the workflow is approved).
      - Compare: to view edits made by participant vs original Job Description Template.
      - Comments: leave comments on the job description form.
      - Grey Boxes (Figure 25)
        - Add Participant with Same Role: allows you to add additional participants if needed.
        - Replace Participant: allows you to replace an existing participant with another.

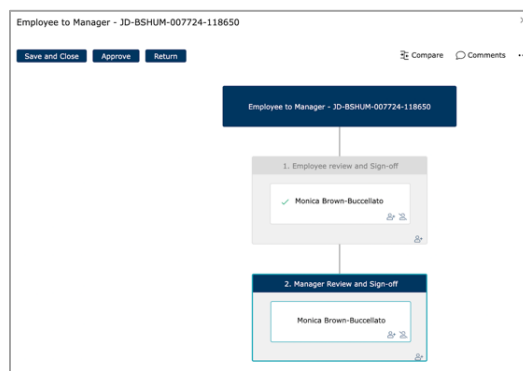
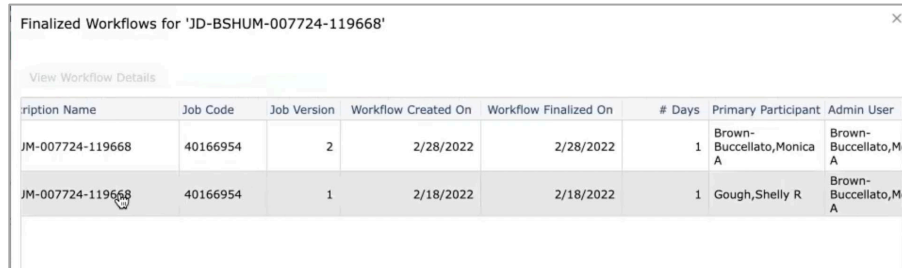


Figure 25

- c. Workflow History: allows you to view past versions of the Job Description in Workflow
  - Highlight a Job Description and click View Workflow Details to see past versions of the Job Description. (This option only becomes available after the first step of the workflow is approved, Figure 26)



Description Name	Job Code	Job Version	Workflow Created On	Workflow Finalized On	# Days	Primary Participant	Admin User
JM-007724-119668	40166954	2	2/28/2022	2/28/2022	1	Brown-Buccellato, Monica A	Brown-Buccellato, Mi A
JM-007724-119668	40166954	1	2/18/2022	2/18/2022	1	Gough, Shelly R	Brown-Buccellato, Mi A

Figure 26: Workflow History

4. **As you are editing the Job Description, please remember to click Save on the bottom of the screen.** You can also hit Form Errors on the top right to see any sections you may have missed. 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.
5. A pop-up showing “Approve Workflow Step” will allow you to send an email to the next step approver.
  - a. 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
6. Depending on the workflow, the same process will continue until it reaches the final step approver. Participants will open the Job Review Task on their Home page and make edits as needed and approve when appropriate.

## 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.

- a. **Step Approvers:** click **Approve Step** to send this JD to the next person in the workflow for review.

The 'Approve Workflow Step' pop-up window shows a workflow diagram with two steps: 'My Step' (Monica Brown-Buccellato) and 'Pending Next Step' (Monica Brown-Buccellato). Below the diagram, there are two sections for email notifications. The first section, 'Send e-mail to the next step approver(s): Monica Brown-Buccellato', includes a 'Preview E-mail' link, an 'Edit Template Step Acceptance - Message to next approver' link, and a text area for 'Add Comment'. The second section, 'Send courtesy e-mail to other participants', includes a 'Preview E-mail' link, an 'Edit Template Step Acceptance - On Accept Courtesy to other participants' link, and a text area for 'Add Comment'. At the bottom, there is a 'Courtesy E-mail CC' field with a placeholder 'Separate e-mail addresses with comma' and an 'Approve Step' button.

Figure 27: Step Approver Pop-up

- b. **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.

The 'Finalize Workflow for JD-BSHUM-007724-118650 [Code: 40176005]' pop-up window has a title bar with a close button. The main content area has a radio button selected for 'Finalize the Workflow and Save the changes to Job.' Below this are three checkboxes: 'Flag as Approved' (checked), 'Notify Managers' (unchecked), and 'Update Employees Records' (unchecked). There is a section for 'Save Revised Job as a new Job' with a radio button. Below that is a checkbox for 'Send e-mail to Primary Participant: Monica Brown-Buccellato' with a 'Preview E-mail' link and an 'Edit Template On Finalize - From Admin to Primary Contact' link, followed by a text area for 'Add Comment'. The next section is 'Send courtesy e-mail to other participants' with a checkbox, a 'Preview E-mail' link, an 'Edit Template' link, and a text area for 'Add Comment'. At the bottom, there is a 'Courtesy E-mail CC' field with a placeholder 'Separate e-mail addresses with comma' and a 'Finalize Workflow' button.

Figure 28: Final Step Approver Pop-up

## Deleting a Workflow

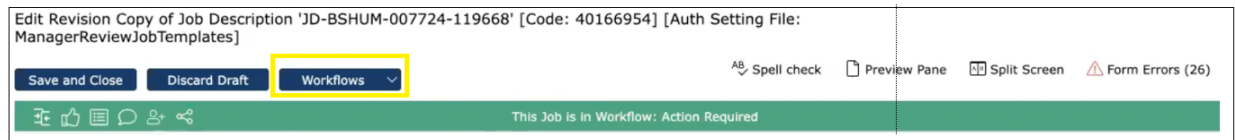


Figure 29: Workflow Details

1. Click Workflows and then click Workflow Details to view the audit trail of the Workflow (Figure 29)
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.
4. Click Delete to finalize the deletion of the workflow

Delete Workflow

Confirm Email options and click Delete to Delete Workflow

☐ Send e-mail to Primary Participant: Jay Henderson

Preview E-mail

Edit Template On Cancel Workflow - Message to Primary Contact From Admin

Add Comment

☐ Send courtesy e-mail to other participants

Preview E-mail

Edit Template On Cancel Workflow - Courtesy Message to All Participants From Admin

Add Comment

Courtesy E-mail CC

Separate e-mail addresses with comma

Delete



## Comparing Between Different Versions

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

Compare Jobs

Primary Job JD--007724-118743\_0001 Form Last Edited By Gough,Shelly R on 2/15/2022

Secondary Job JD--007724-118743\_0001.3 Form Last Edited By Henderson,Jay on 3/4/2022

Merged Changes Side-By-Side

Only selections with changes

JD--007724-118743

Qualifications

LICENSES AND CERTIFICATIONS

Certified Compensation Professional credential preferred. P

Certified Compensation Professional credential preferred. P

Competencies

Core Competencies

Time Management Uses his/her time effectively and efficiently; values time; concentrates his/her efforts on the more important priorities; gets more done in less time than others; can attend to a broader range of activities.

Drive for Results Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; bottom-line oriented; steadfastly pushes self and others for results.

Customer Focus Is dedicated to meeting the expectations and requirements of internal and external customers; gets first customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

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

Compare Jobs

Primary Job JD--007724-118743\_0001 Form Last Edited By Gough,Shelly R on 2/15/2022

Secondary Job JD--007724-118743\_0001.3 Form Last Edited By Henderson,Jay on 3/4/2022

Merged Changes Side-By-Side

Only selections with changes

JD--007724-118743

Qualifications

LICENSES AND CERTIFICATIONS

Certified Compensation Professional credential preferred. P

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Competencies

Core Competencies

Time Management Uses his/her time effectively and efficiently; values time; concentrates his/her efforts on the more important priorities; gets more done in less time than others; can attend to a broader range of activities.

Drive for Results Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; bottom-line oriented; steadfastly pushes self and others for results.

Customer Focus Is dedicated to meeting the expectations and requirements of internal and external customers; gets first customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

3. Under Workflow > Workflow History, you can see the different versions made for this Job Description
  - a. Highlight the Job Description you would like to view and click View Workflow Details

Finalized Workflows for 'JD--BSHUM-007724-119668'

View Workflow Details

Description Name	Job Code	Job Version	Workflow Created On	Workflow Finalized On	# Days	Primary Participant	Admin User
JM-007724-119668	40166954	2	2/28/2022	2/28/2022	1	Brown-Buccellato, Monica A	Brown-Buccellato, Monica A
JM-007724-119668	40166954	1	2/18/2022	2/18/2022	1	Gough, Shelly R	Brown-Buccellato, Monica A

# 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 30)
  - “Classified” then a Compensation Consultant in UCB People and Culture has reviewed and classified the job description. (Figure 31)

Preview

Default

**Berkeley**  
UNIVERSITY OF CALIFORNIA

**JD-FMHUM-007394-23023**  
Job Description

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 31

Preview

Default

**Berkeley**  
UNIVERSITY OF CALIFORNIA

**JD-FMHUM-007394-23023**  
Job Description

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 30

- Ability to Download/Share Job Description in a variety of formats:



○ Word



○ Adobe



○ HTML



○ Share via link

# Job Description Template Required Fields

---

## 1. \*Job Details

### a. Job Status and History

- Date last edited: auto-populates
- \*Action Requested: required, select from choice list
- 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: auto-populates, non-editable

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

- \*Position number: required, auto-populates, editable
- \*Employee name: editable
- \*Supervisor name: required, editable

### c. Organization

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

### 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
- \*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)
    - Submitters Name
    - Is this action being performed for the purpose of recruitment?
    - Current Job Title
    - Proposed Job Title
    - Four short answer questions
    - Four multiple-choice questions:
    - Attachments
4. \*Key Responsibilities
  - a. \*Key Responsibilities: auto-populates, required, editable
  - b. Edit and customize each applicable key responsibility from the job standards
  - c. Input the percentage of time spent for each key responsibility listed
  - d. Indicate which key responsibility is Essential (by checking the box)
5. Knowledge, Skills, and Abilities (KSAs)
  - a. \*Knowledge, Skills and Abilities: required, select
    - i. Indicate which KSAs are Required vs Preferred
  - b. Education: auto-populates, non-editable (always set to Required)
    - i. User can add additional education – must be Preferred
  - c. Licenses and Certifications: editable
  - d. Budgetary Responsibilities: editable
6. \*Supervision
  - a. \*Level of Supervision received: required, select from choice list
  - b. Positions Supervised: editable
    - i. 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. PEM 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
- 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: view only
- 12. Workflow Details
  - a. Workflow Approvals
  - b. Approvals
  - c. Reviewer Comments

Additional Information:

1. B. 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.
- 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”.
- Note: This also means if the Position becomes vacant or encumbered by another Employee, the Employee Name field should be manually updated in JDX.
- 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.

# Resources

## NEED HELP USING JOB BUILDER?

Find additional information on the People & Culture Compensation website:

<https://hr.berkeley.edu/compensation-benefits/compensation/job-builder>

Submit a ticket to the UC Berkeley Job Builder JDX Administrators:

<https://forms.gle/Y8eRU9sFZPQf18Cq9>

Join us during a drop-in session: <https://docs.google.com/document/d/1W6Xqko16TuuJJRbCFwi-KcuaxFSgkpWOvGKAXnRHQg/edit?usp=sharing>