Job Builder JDX

FAQs

Use Ctrl F to search for keywords or view Document Outline

JDX Interfacing with other UC systems

Q: How does the system interface with the HR ticket system?

A: Job Builder JDX does not currently interface with the HR ServiceHub system.

Note: the HR Case and HR Task numbers should be entered by the Manager and/or HR Partner in the HR/Comp Approvals tab of the JD template.

Q: Now that we are in JDX, does the process remain the same for classification? Should a copy of the JD be attached to the case?

A: Yes, the process is the same for classifications. A copy of the classified JD should be attached to the case and/or HR Task.

Q: How do managers attach the job description in ServiceHub or in an email?

A: Either include the PD Form Name in the ServiceHub Case/Task or email or download the Word or PDF printed version of the job description (by selecting the Preview Pane).

Note: Do **NOT** use the Link feature to share the JD - it does not capture edits to the JD while it's in workflow.

Q: Do we need an SN case to get a job classified or can we just do it via job builder? What is best practice?

A: A ServiceNow Case is not required to initiate and create a JD in Job Builder - but it is best practice to have your clients submit an SN case for new positions (that will need to be posted for recruitment) and for reclassifications (that will require UCPath transactions to be completed upon approval of the reclass request).

Q: How does the system interface with UCPath?

A: Job Builder JDX does not automatically interface with UCPath. Currently, UCOP runs a cognos report to pull employee/job data into JDX on a nightly (week day) basis. UCPath job data is used to connect the manager/supervisor of positions to the JDs in the "Jobs That Report To Me" quick link. JDX uses the Position Number on the JD template in JDX to connect the JD to the employee view of their own Job Description.

Note: UCPath Position Number does not automatically update the Employee Name and Supervisor Name fields on the JD template in Job Builder JDX.

Q: Is JCL (TCS) salary info incorporated in JDX?

A: No

General Questions

Q: When I try to open and edit the JD template, I see a notification pop-up saying the JD is locked. How do I edit this JD?

A: This notification pops up to prevent multiple people from editing the JD at the same time. Although many different people can edit a JD, they can't do it simultaneously like Google Docs. Please have the last user open the JD template once again and click 'Save and Close'.
As a reminder, when you are finished editing a JD, please click 'Save and Close.' When you 'x' out of the JD template or browser that you are editing the JD on, it will trigger this notification for the next user trying to edit this JD.

Q: Will we have access to all Job Families and Job Functions or only those open to our specific campus?

A: Users will be able to view all job titles system-wide however will only have access to create and edit job descriptions in titles extended for Berkeley use.

Q: Is JDX slow or is it just me?
No, it is not just you and you are not imagining things!
The slowness of the system is campus-wide currently. We still have some technical glitches we are working on with your JDX vendor - which is slowing the system down a bit. This shouldn't be a long-term thing - however until we get into a more stable environment and fewer IT fixes happening behind the scenes, we will continue to have slowness while working in JDX.

Q: Is there an improvement/ enhancement request form?

A: There is not an official form - please email Compdesk Departmental for improvement requests (please note - change requests can take a long period of time to configure, test, and implement in JDX and may cost the university money depending on the scope of work requested)

Q: Is there a way to link JDs so if there are changes to a position across the board they are reflected on all?

A: Not on individual job descriptions however changes to job standards will cascade into the "For Reference Only" sections on each JD template. Note: "For Reference Only" sections do not show on the Printed version of the JD.

Q: How do I print out a JD or download it as a Word or PDF?

A: Use the Preview Pane or Preview icon to view the JD in JDX - in this screen, you will see a Word document icon and a PDF document icon, click on the Word or PDF icons, then select "Download file".

Q: Should I show a position that I currently have open, on my list in Job Builder?

A: No, vacant positions will not show in your Jobs That Report To Me - however, they should be stored in the Department Library quick link.

Q: Is there a way for me to view other JDs created within our Division in the new system?

A: Yes, please email Compdesk Departmental. If you can, also include the department org nodes you would need access to. After access is given, you can find these JDs in the Department Library.

Q: Does inputting an existing position's job description into JDX require approval from both an HR business partner and a compensation review?

A: Yes, to verify the information transferred onto the job description template in JDX is accurate. Comp reviews to ensure the JD continues to meet that level classification and will indicate "Classified" on the JD template in the Status field on the Job Details page.

Q: Does recruiting to fill an existing position require a compensation review? Is that a new requirement? It did not require when I recruited two staff in 2022.

A: Recruiting to fill an existing position requires the JD to be created, saved, and Classified in the JDX platform. This officially took effect January 1. If you have an existing job that was classified pre-JDX, the JD needs to be created in JDX using the Formal Classification Review 3-step workflow prior to posting for recruitment. This ensures the JD is updated, accurate, reviewed and classified before recruitment is initiated.

Q: Is there a place to review the job standards for certain positions?

A: Yes, the Job Standards Catalog

General Workflow

Q: How do I set up the Workflow correctly?

A: The key is to choose the correct workflow. Resources: Which Workflow to Choose & Which Workflow to Choose - How To Video

1. **Add Position Number to JD (1-step):** should only be used to enter the Position Number on the JD template.
2. **Employee to Manager:** should be used when an Employee wants to edit their JD OR when a Manager wants the Employee to make updates to their own JD.
3. **Formal Classification Review:** the workflow that is most frequently used because it is the main workflow that includes the Compensation Team for Classification Evaluation.

   *As of January 1, 2023 **JDX is to be used for: New Positions before posting for recruitment, Vacant positions that need to be filled, and Reclassification Requests for Staff positions***
4. **Minor Update to JD (1-step):**
   a. **Use when you are creating a JD in JDX for an encumbered position.**
   b. Use when a JD is in Classified status and you are making a minor update.
      i. There's not a specific percentage as far as what is considered "minor updates" vs "significant changes". examples of minor updates: adding in PN, editing the Department Summary, updating the terminology for a new system/software/project, changing 5-10% of the key responsibilities & not updating problem solving examples is generally considered a minor update.
      ii. examples of major changes: adding supervisory components to an individual contributor role (generally should come through for review by Comp), removing direct reports from a Supervisor or Manager level position, adding a completely new 30+% key responsibility, changing the job description more than 50% - **these types of changes must go through the Formal Classification Review 3-step workflow.**
5. **Preliminary Review:** intended to be used when you are in between making minor or major changes to a JD. Managers can work with their HR Partner to determine if the Compensation Team needs to get involved for re-review of Classification. If Compensation does need to get involved, finalize the current Preliminary Review workflow and **start a new** workflow that includes Compensation, i.e. Formal Classification Review 3-step.
6. If you are unsure of which Workflow to select, either choose the **Formal Classification Review** or email your HR Partner or Comp Consultant,
   a. **Tip:** if you need to edit the JD, always add yourself (and others who need to edit) to Step 1 of whichever workflow you select. Multiple participants can be added to each step of the workflow you choose by selecting the “+”.

Q: Is it possible to change the workflow? How do I correct a workflow? What if I select the wrong workflow?

A: No - workflow cannot be changed to a different workflow once it's started. The participants of the current/incorrect workflow should give a thumbs up to approve/finalize the current workflow and then a new workflow can be started for that JD.

Q: How can I delete a JD/workflow that I created in the system?
Currently, only HR Partners, the Compensation team, and Administrators of the JDX system have access to delete a workflow in JDX. The Compensation Team and JDX Administrators are the only ones that can delete the job description from JDX. If you need to delete a JD, please continue to email Compdesk Departmental for further assistance.

How to Delete a Workflow for a JD for HR Partners:

1. Open the JD template and click on the "Workflow Details" button found in the green banner
2. Click on the three dots in the upper right corner and click "Delete Workflow"
3. A pop-up will appear, giving you the ability to notify participants via email. Click Delete to finalize the deletion of the workflow

***Note: deleting a workflow <u>deletes all edits</u> made to the JD while the JD was in that workflow**

Q: What if I don't know who the HR Partner is for the HR Review step of workflow or who the Compensation Consultant is for the last step of the workflow I selected?
A: Find your department's assigned HR Partner on the Berkeley Region Services website: https://regionalservices.berkeley.edu/ (for to your region, then to HR departments).

Q: What if I don't know who the Compensation Consultant is?
A: Find your department's assigned Comp Consultant on the People & Culture Comp & Benefits website: https://hr.berkeley.edu/about/contact/compensation/assignments

Q: I see a JD that's in "Default/Conversion" status, what do I need to do to get that JD classified?
A: Any JD that is in Default/Conversion status should have workflow started (Formal Classification Review 3-step) and the manager/supervisor of the position should edit and update the JD to the individual's job description. Then, the JD can be routed to the HR Partner then to Compensation for Classification review.

Q: When the review of HR is ready, will the HR Partner receive an email to go into the system and do our review?
A: Yes, unless the manager/last participant in the workflow unchecked the Email Notification. HR Partners can log into JDX to see if they have any JDs in active workflow through the "My Job Tasks" quick link. The participant step marked in green indicates that the workflow step is currently in their queue; they are responsible for completing their step in the workflow.

Q: I have a new position that I've routed for classification but I don't know how to see where it is in the workflow. How can I see who's approved and whose queue it's in? Resource: Find a JD that's in Workflow
A: You can find the JD in your "My Job Tasks", under Quick Links (if they added you to the Workflow as a participant). The supervisor will need to "approve" the JD before it flows to the next step in

workflow. They can approve by selecting the THUMBS UP in the green toolbar at the top of the JD window.

Q: I am part of a JD's workflow but do not see it in my home page or in "My Job Tasks" Quick Link.
A: When users select participants to be a part of the workflow, they must select the Employee that is listed as "Primary" under the Record Type column. The original initiator of the JD's workflow must ensure that all the participants in the workflow are employees with Primary accounts.
*If a Secondary account was selected for a participant and you are unable to replace the Secondary account with the Primary account, please reach out to Compdesk Departmental.

Where to find the JD after Workflow has been Finalized
Q: How do I view job descriptions once they are classified again? What is the navigation to find classified PDs? Resource: Find a JD that's in Workflow
A: HR Partners can search the newly classified JD in the HR Library and Managers can search in the Department Library.

Q: When I navigate to the Department Library, I only see a few JDs. How can I see the full list?
A: There is an automatic filter "Job Descriptions Requiring my Review" that is selected. Please close out of the filter and try searching again.
If you are still having trouble, try searching by the last 5/6 digits of the JD. It is a unique identifier for each JD. *Another unique identifier for a JD is the Job ID.

Adding/Replacing Participants and Sharing a JD in Workflow

Q: I started a JDX workflow for my job reclass but I forgot to copy myself as the first step and can't find it. How do I get this JD again?

If you forget to add yourself to Step 1 of the workflow - you can always ask the participant that was added to "add" you to the workflow. You can then find the JD in your "My Job Tasks" quick link.

If you need additional assistance, email Compdesk Departmental .

Q: Can more than one person work on a job description, i.e. shared among several people?

A: Unfortunately, edits cannot be made at the same time as a Google Doc but job descriptions can be shared with more than one person (via adding multiple people as participants in a step of the workflow, using "+"). However, **only one person can edit and save edits at a time.**

Q: I seem to get an error when I add an additional participant even though the additional participant is in my step of workflow, why is that?

A: The system only allows the primary approver of each step the ability to add additional participants. If you experience this error, please reach out to the primary approver to let them know which additional participants you'd like to add.

Q: Can you invite others to edit a JD once it's been submitted for review?

A: Additional participants can be added to a particular step of the workflow (even after the workflow has started).

Note: once Workflow has started - you can only add/replace a participant in a Step of workflow that you are part of. (i.e. if you are part of Step 1, you can only add/replace participants in Step1)

Q: How do I transfer a workflow to someone else?

1. Log into JDX, click on the My Job Tasks quick link and find the JD.
2. Click once on the JD, then over to the right you'll see a green toolbar.
3. Click on the document-looking icon (Workflow Details).
4. When you see your name - you'll click on the "Replace Participant," icon that has a person with a strikethrough, and add the other user in place of yourself to the step of the workflow.
5. Click Save and Close.

Note: once Workflow has started - you can only add/replace a participant in the Step of workflow that you are part of. (i.e. if you are part of Step 1, you can only add/replace participants in Step 1 *only if you are the Step Approver)

Q: When I share the link to a JD the Date Last Edited field does not show when the JD was last updated and saved.

A: When sharing the JD link while the job is in workflow, the job will automatically show the creation date (in the Date Last Edited field) as the link will not be fully active until the workflow is finalized.

Note: it's not recommended to use the share link to share the JD with another person.

Additional Workflow

Q: Can one position number be included on multiple job descriptions in JDX? *(updated January 2023)*

A: No. JDX uses a 1:1 **(one position number to one job description)**. If you have a Multi-Headcount Position Number, please contact Compdesk Departmental for assistance to ensure the JD properly connects to ALL Employees assigned to that Position Number. If you have entered the same position number on more than one JD in JDX, the system will not know which one to link to the Employee or Manager view. Managers will need to manually update each JD to reflect the correct Position Number that's linked to the employee profile in JDX. Contact Compdesk Departmental for assistance if needed.

Q: How can I edit a JD if I have already submitted it for review and approval via workflow?

A: All Edits to a job description must be made while the JD is in your step of workflow. **It's important not to 'approve' (Thumbs Up) your step of workflow until you have fully reviewed the JD and it's ready for the next participant to review.** If you need to make additional edits you will need to reach out to the participant in the next step (via email) and ask them to 'return' (Thumbs Down) the JD back to your step of the workflow.

Q: If I receive a JD for review and make edits or suggestions, if I were to hit the thumbs down icon, would that return the JD with my edits/suggestions, or would it be better to note those outside the document when sharing it back with a manager/supervisor?

A: The JD would be returned to the last step of the workflow with the edits/suggestions that you saved.

Q: What is considered a "minor update" for a JD? What are some guidelines/examples of what constitutes "minor"? (Resource: Job Aid, scroll to the bottom of page to for examples)

A: At the managers discretion, a unit can use a previously classified job description within the department to recruit. This includes job descriptions that have been reviewed and classified by Central HR (People & Culture) Compensation recently with minor edits that do not impact the level of classification. Minor edits include; updating the position number, updating the manager/supervisor, revising a portion of the key responsibilities (not including adding lead/supervisor responsibilities), and/or updating the working title.

Add a New Job Description

Q: How do I create a new job description? Resource: Creating a New Job Description

A: Add New Job Description quick link → Select Base Job → Select Formal Classification Review workflow → Start Workflow.

Q: I tried to “Add a New Job Description” - when I clicked "Save" and "Save and Close" was the job description routed through the workflow process?

A: No, selecting save and save & close does not route the JD through the workflow process. You’ll need to "Start workflow" and then the JD will route to the participant(s) in Step 1. For the JD to route to the next step, the user will select the thumbs-up button/icon in the green toolbar - in which a screen will pop up allowing the user to add any comments to be included in the notification to the next step of the workflow.

Q: Does the system track minor edits?

A: Yes, click on the “Compare” button in the green banner to view similarities/differences between the different versions of the JD template you have saved. The “Compare” button is the first icon in the green banner.

Q: I edited, updated, and saved a job description in JDX and the system shows a future-dated timestamp, why?

A: The Job Builder JDX is currently set to Eastern Standard Time (EST) - so any date/timestamp you see in the JDX platform will be 3 hours ahead of CA time.

Q: Does this new system have a better autosave? For example, the current system sends a message that asks if you would like to save your work before the system times out.

A: The JDX system does not auto-save. All users are advised to click “Save” (bottom right of the template) throughout their time spent editing the description.

Q: The supervisor's name is correct in UC Path but not in Job Builder

A: The Supervisor Name field on a job description in JDX is a manually entered and manually maintained field. The supervisor name you are seeing on the JD in JDX is old (based on UCPath data in early March - when we pulled data to create these "Default" [placeholder] JDs).
When you begin to edit this JD in JDX - you can update the Supervisor Name field to the appropriate supervisor name.

Q: Difference between Custom Scope and Job Summary? (Resource: What is considered a Complete and Accurate Classification Request)

A: Job Summary - should be used to describe why the position exists/purpose of the position (1-2 sentences minimum)

Custom Scope - should be used to summarize the scope of the job, the impact of the position, the complexities of the role (level of complexity), the job expectations within the context of the department operations (1-2 sentences minimum)

Note:

- For non-rep Career Tracks jobs, there is a pre-populated summary that can be edited/customized
- For rep jobs, the Custom Scope is often blank and refers to the UC Net series and class concepts

Q: Is there a minimum amount of Key Responsibilities that are needed? (Resource: What is considered a Complete and Accurate Classification Request)

A: Yes, there are a minimum (4) and maximum (15) key responsibilities for each job description built into the JDX template. This is intentional as we often get JDs that have very little detail and elaboration developed. The minimum is 4 and n/a would not be acceptable.

- I'd recommend referring to the Job Standards' key responsibilities language and considering if any of that language is applicable to the position and incorporating that back into the key responsibilities section.
- Some departments are also developing a 5% key responsibility for all jobs that speak about the professional/career development expectations of the position (i.e. language outlining the responsibility of the position to keep up to date on the latest trends and policies, attend relevant training, courses, and workshops, etc).

Q: I was adding Key Responsibilities but received this error message "Too many Key Responsibilities on the JD." Is there a limit to the Key Responsibilities?

A: The maximum number of key responsibilities is 15. If the system sees more than 15 Key Resp. line items then you will receive that message. Try to group similar functions into one larger percentage of key responsibilities.

Note: there is also a minimum of 4 Key Responsibilities.

Q: It seems that the text boxes do not expand as I am writing the Key Responsibility.

A: Click "Save," located on the bottom right. This will expand the text boxes.

Q: How do I make notes/comments on the JD in JDX?

A: Use the HR/Comp Approvals tab on the JD template to make notes in the "General Notes" text box. Notes saved on the section of the JD template will be kept with the JD in the system. Notes made using the "comments" icon in the green toolbar will only be visible to users while the JD is in that particular workflow but will disappear when the workflow is finalized.

Q: Where can I upload an attachment in JDX?

A: There are two places to upload attachments in JDX directly on the job description. You can upload attachments in the **Job Details section** (at the bottom) and in the **Reclassification section** (only visible when the Action Requested field is set to Reclassification).

Q: What file types are accepted to be uploaded to the attachments in JDX?

A: While many kinds of files can be uploaded as attachments, the system does not support previews of all file types. Most file types can be uploaded as attachments - as a general rule, most PDF documents, Excel documents, or Word documents will display in the preview pane under the attachments tab. In the case of PowerPoint files, you can download the PowerPoint file as needed and view it in PowerPoint, but cannot preview it within JDX.

Q: How do employees sign their job descriptions? Is that done within the system as well?

A: Phase 2 of JDX implementation will include Employee Acknowledgement functionality (TBD). Phase 2 is planned to be rolled out sometime between mid/late 2023.

*Currently, at the very last page of the Word document version of the JD there is a place for the Employee to provide a wet-signature.

Reclassification Requests (Resource: What is considered a Complete and Accurate Classification Request)

Q: I want to start a reclassification - where do I start?

A: You can create a reclassification request through the "Add New Job Description" Quick Link and follow the same steps as you would while creating a new JD.

1. Click on the "Add New Job Description" quick link
2. Select Base Job and **choose the proposed Job Title/job standard template. Do not start from the existing level job title.**
3. For Workflow, choose the Formal Classification Review 3-step workflow
4. When editing the JD, the Action Requested field should indicate "Reclassification". This will open the Reclassification section of the JD template which is required to be completed for all Reclassification Requests. This additional section can be found in the left column that lists all sections in the JD template

Q: Where is the cover sheet located in JDX?

A: When you set the Action Requested field to Reclassification there will be a new section of the Job Description template (on the left side of the template where all the sections are listed) that opens up called "Reclassification". This Reclassification section of the template is the replacement for the Cover Page document.

Q: Will Comp still review reclass requests if the JD PEM section is incomplete?

A: No, the PEM section is **required** to be completed with each job description and error messages will flag if the PEM is incomplete.

B. Staff Research Associate (SRA) Addendum

Q: Where is the SRA Addendum?

A: Previously, the SRA Addendum was filled out through a Word document but now it is incorporated into JDX. When you create a new SRA job description in JDX, the addendum will automatically appear on the left hand side of the job template.

Q: I completed the SRA Addendum in JDX, do I still need to fill out the Word Doc?

A: No. The SRA Addendum is now included in JDX automatically for all SRA positions and replaces the Word Doc.

Transition from Old Job Builder to JDX

Q: When should I start using the new Job Builder (JDX)?

A: Now. Any new job descriptions should be created in the new Job Builder JDX platform. Any updates to existing job descriptions should be created in the new Job Builder JDX. Any edits to JDs that need to get posted for recruitment should be done in the new Job Builder JDX.

Q: When should I stop using the old Job Builder?

A: No later than June 30th, 2022 to ensure updated Classified job descriptions get imported into the new Job Builder JDX with all updates. Old Job Builder will be retired on June 30th. Any updates in the old Job Builder made from July 1 forward will not be saved or reflected in the new Job Builder JDX.

Q: Will the old Job Builder be available as "read-only" after June 30th?

A: No. You should 'Print' and Save as a PDF any position descriptions from the old Job Builder that you may want to reference later. Job Descriptions in the old Job Builder that are in Classified status as of June 30th will be imported into the new Job Builder JDX in late July.

Note: The Compensation team will have access to the old system until August 31st - but all classification decisions (on old JD templates) after June 30th will be tracked outside of the old system.

Note: Old Job Builder will be unavailable to all after 12/9/22.

Q: Will I be able to access the old Job Builder after June 30th?

A: Users should not access the old Job Builder after June 30th. The Compensation team will have access to the site for a short period of time beyond June 30th and can provide temporary access to the old Job Builder to users, email Compdesk Departmental to make this request. Note: temporary access is no longer available (as of 9/30/22).

Q: What if I have a job description in the old Job Builder system that is currently pending classification review? (What if it's pending classification past June 30th?)

A: If the JD is under review with your Compensation Consultant on or after June 30th, the updated Classified version will likely not get imported into the new Job Builder JDX. (You should plan to save a PDF copy of the description as you may need to manually re-create the JD in Job Builder JDX). Please work directly with your Comp Consultant to inquire about a specific JD.

Q: If I have a JD that was approved in the previous job builder, but I cannot find it here, where can I find it?

A: JDs in the old Job Builder from late April, May, and June 2022 have been imported into JDX. If you cannot find a Classified JD in the Department Library - please email Compdesk Departmental with details about the JD.

Q: If a JD from the old Job Builder didn't have the Position Number on it but it was in Classified Status - where do I find that JD in JDX (it's not in the Jobs That Report To Me quick link)?

A: Look in the Department Library. HR Partners look in the HR Library. Contact Compdesk Departmental if you cannot locate a PD that should already be available in the new system. **Note**: all JDs that were updated to 'Classified' status in late-April/May/June 2022 (in old Job Builder) were imported into JDX in November 2022.

Q: I had a job description classified in the old Job Builder for an Administrative Officer 2 and now I cannot find the JD in JDX by searching the PD Form Name. Why can't I find it?

A: All Admin Officer 2 descriptions have been updated to the new title code 004263 (the accreted job code) and new JD template, thus updating the PD Form Name to the AO 2 CX job template. Example: If the Form Name you're searching for is "JD-FJBDT-007376-21334" try searching using "JD-FJBDT-004263-21334"

Note: UCOP is making this update in UCB JDX beginning 7/8/22 - updating the PDs that are currently associated with job code 007376 to job code 004263.