JDX Supervisor – Approving Workflow Job Aid

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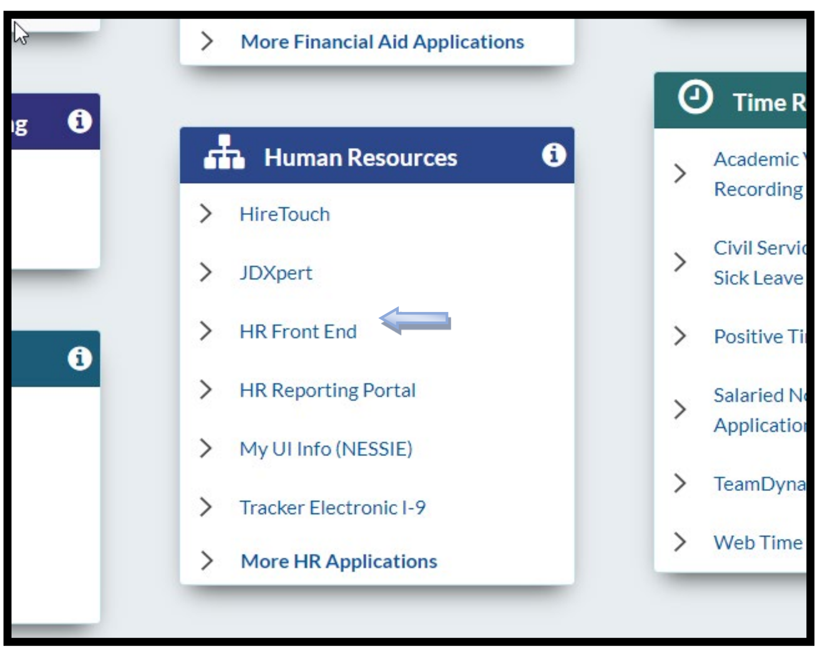
How to Access the JDXpert System:

1. Open internet browser and go to: apps.uillinois.edu
2. Select JDXpert (found on the Human Resources 'card')
3. Log in to JDXpert using your net ID and password



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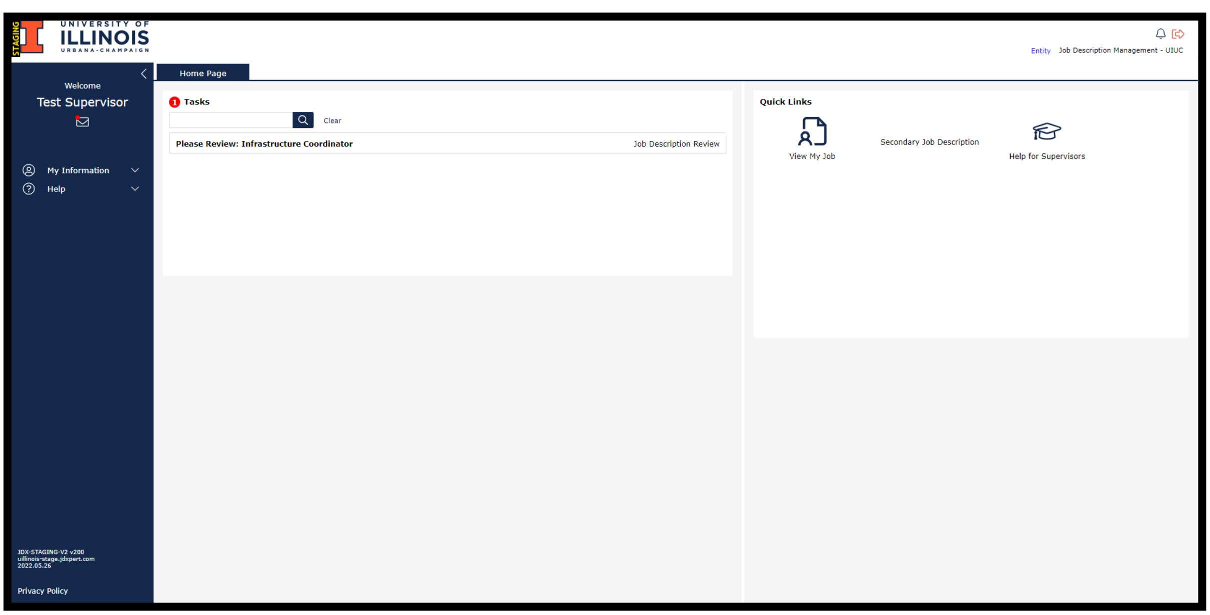
Workflows with Hiring Manager (Supervisor) Approval Stop:

1. The following workflows will require a Hiring Manager (Supervisor or Supervisor proxy) approval stop in JDXpert:
   a. Job Description Reviews
   b. Staff Appointment Change Requests
   c. Staff Vacancy

JDXpert Homepage Overview:

1. After you log into the system, you will be brought to this home page.
2. The Quick Links Menu and Menu in the left blue column are identical and are two ways to access the same items.
3. Menu Overview:
   a. **My Information – View My Job:** Once an employee's Job Description has made it into JDXpert, they can view it using this feature, as well as export their Job Description in different formats.
   b. **My Information – Secondary Job Description:** If the employee has a secondary job, they can view it here with the same functionality as "View My Job".
   c. **Help for Supervisors:** Links to job aids can be found here, particularly guidance on how to access and sign off on a job description.
   d. **Task List:** This will list all workflows which currently require action by you to progress.



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Accessing the Workflow for Review:

1. **From** the **Main Homepage, in the middle of the screen, under "Task List"**
    a. Select the workflow you wish to review.
    b. For training purposes, this example is a test job titled "Infrastructure Coordinator" in a Staff Vacancy Workflow.
    c. Double Click on the title to open the workflow.
    d. NOTE: Having a workflow listed under your Task List indicates you have been listed as the Hiring Manager/Supervisor approval stop and need to review and approve to advance the workflow.

Reviewing the Workflow Tabs:

There are multiple tabs in the workflow view. As a supervisor, you only need to review the Job Summary, Duties and Responsibilities, Qualifications and Physical Demands tabs.

1. **Review the Job Summary Tab:**

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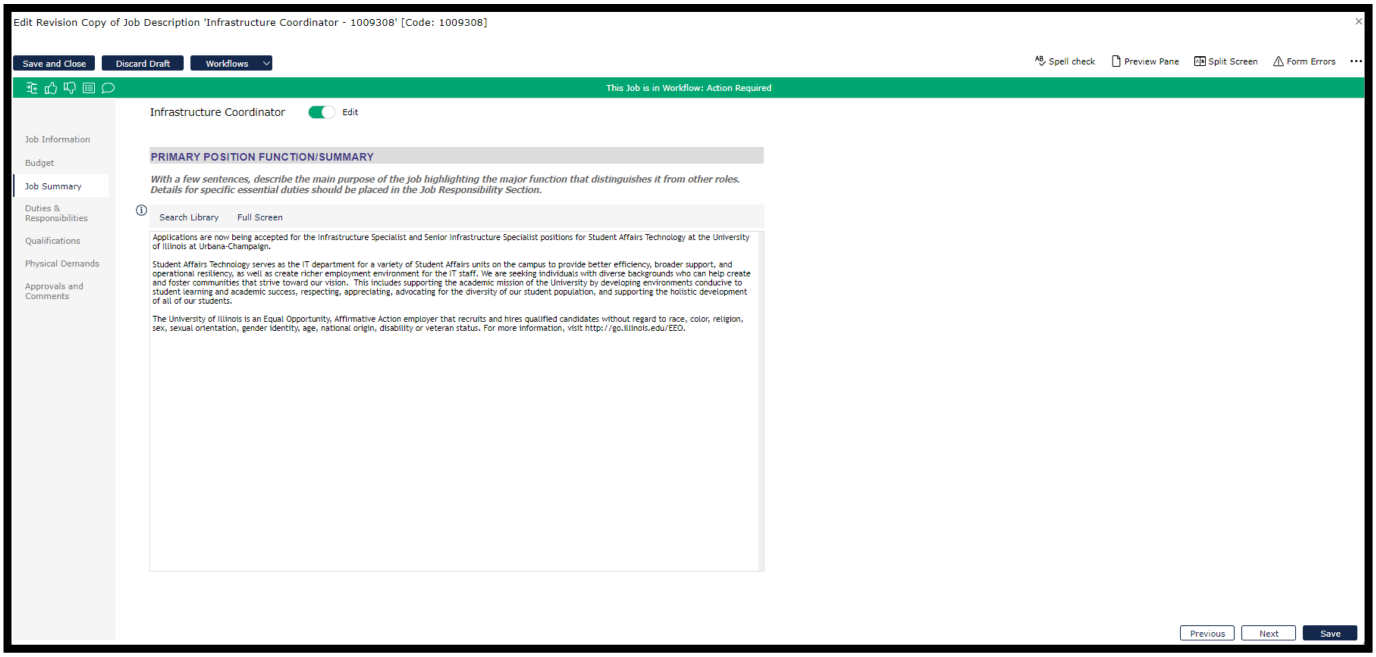


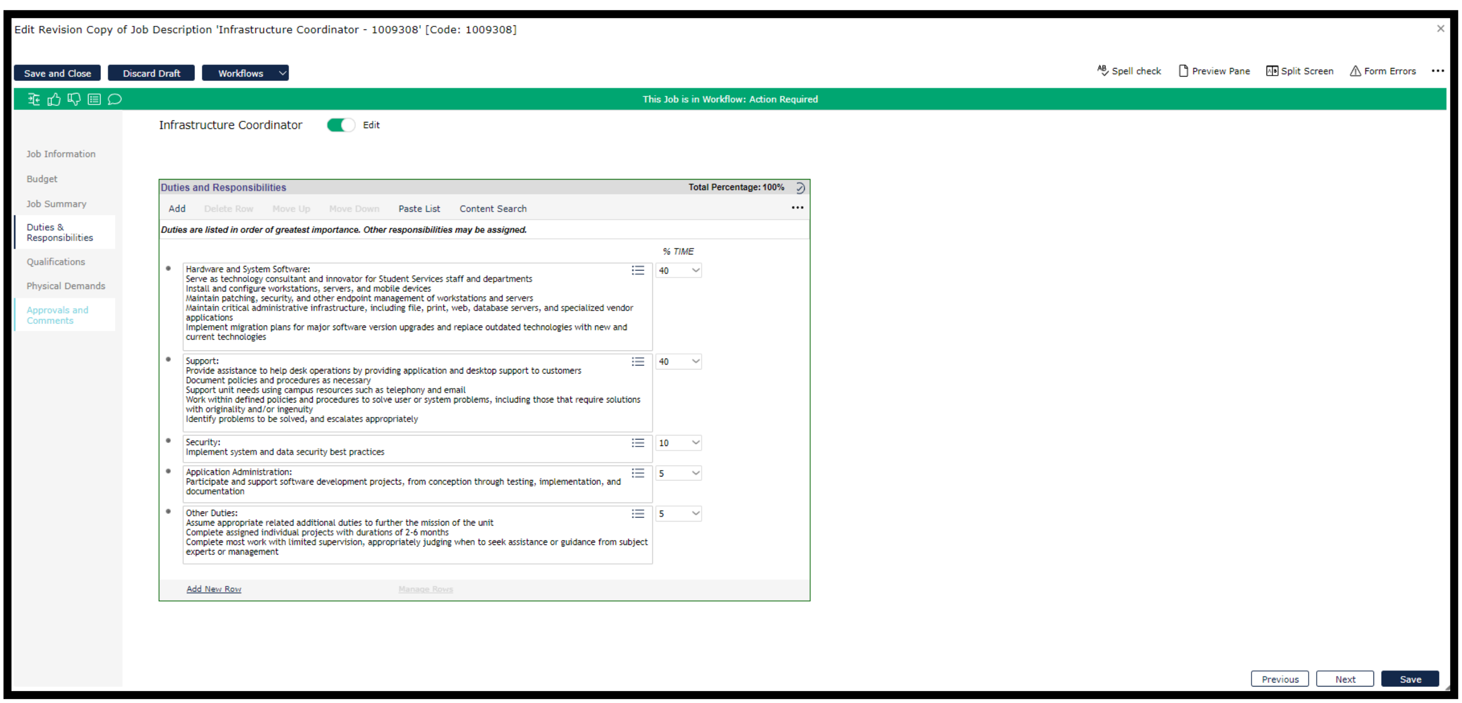
a. **Review the Job Summary Tab and make any changes you deem necessary on this tab.**

b. **Click 'Save'** to save the information entered.

c. **Click 'Previous"** to move back to the **Budget** Tab if you wish.

d. **Click on Next to move to 'Duties/Responsibilities'.**

2. **Review the Duties and Responsibilities Tab:**



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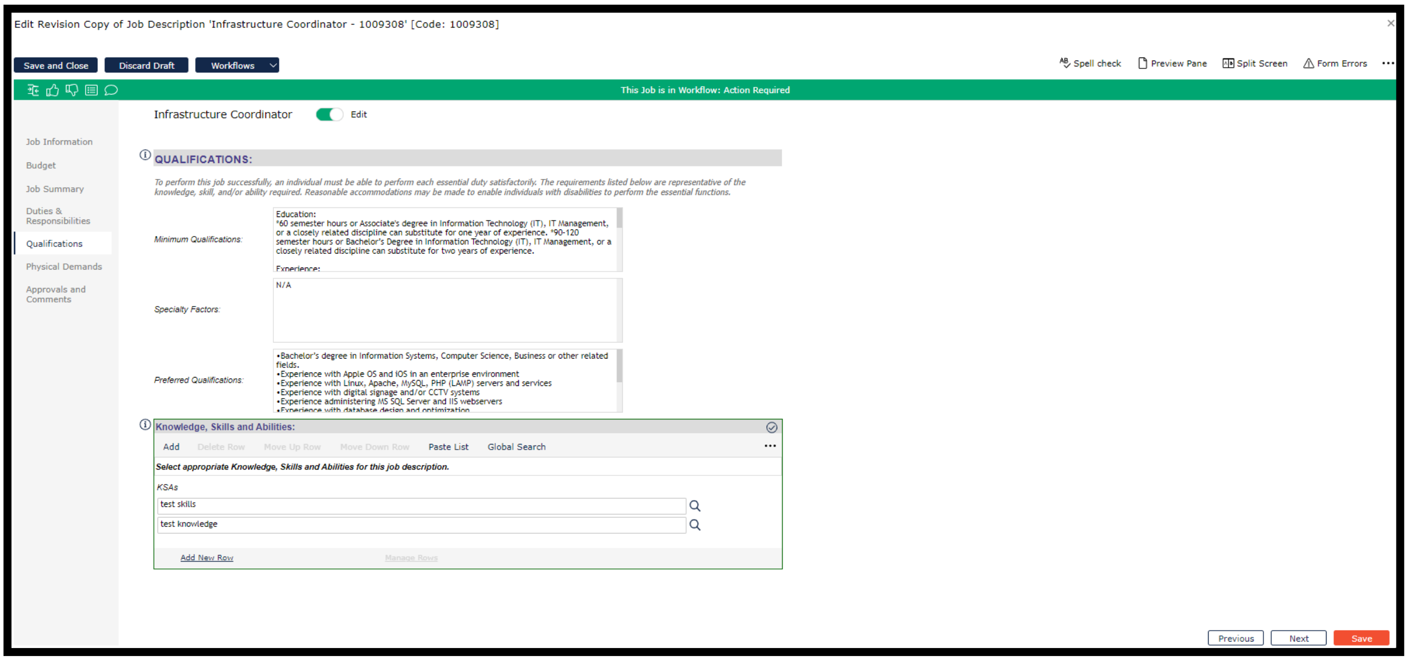
a. **Review the Duties and Responsibilities Tab and make any changes you deem necessary on this tab.**

b. **Click 'Save' to save** the information entered.

c. **Click 'Previous'** to move back to the 'Job Summary' Tab if you wish.

d. **Click on 'Next' to move to 'Qualifications'.**

3. **Review the Qualifications Tab:**



a. **Review the Qualifications Tab and make any changes you deem necessary on this tab.**

b. **Click on 'Save'** to save information entered.

c. **Click on 'Previous'** to move back to the Duties/Responsibilities Tab if you wish.

d. **Click on 'Next'** to move to 'Physical Demands'.

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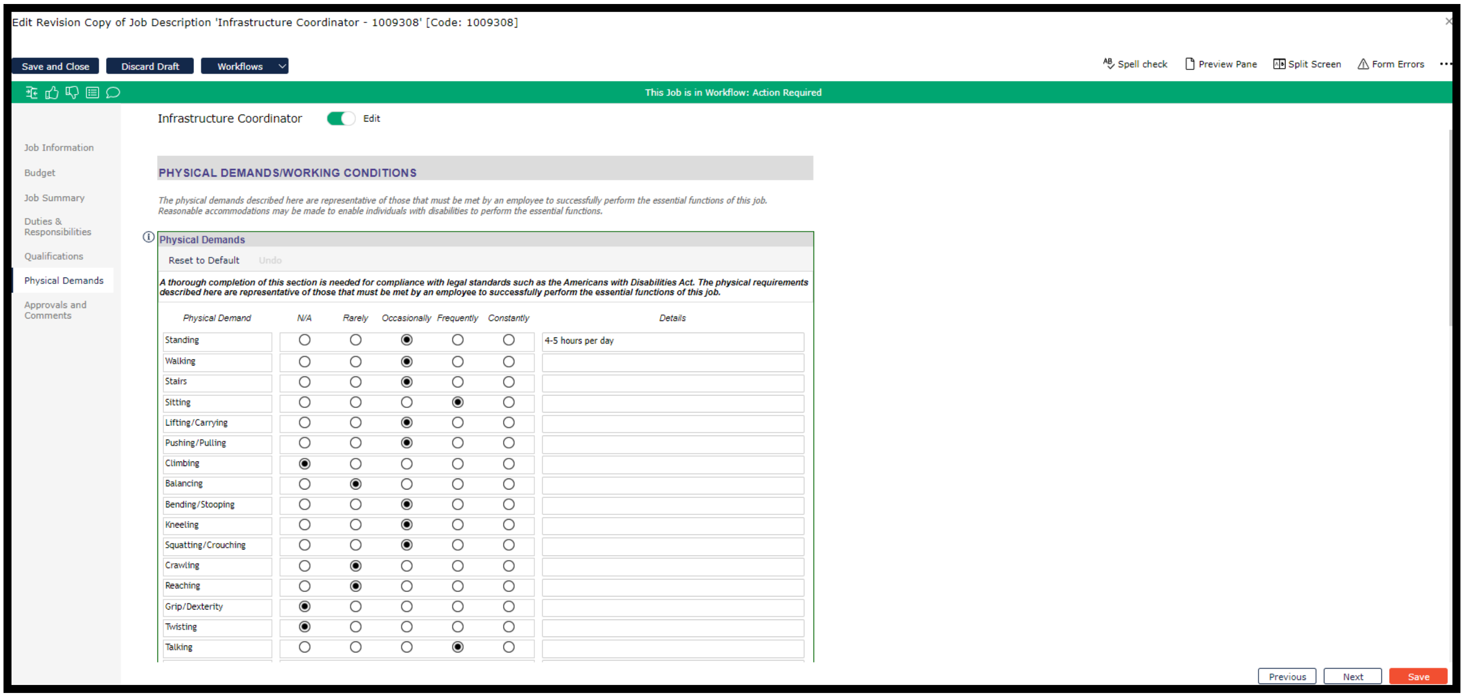
4. **Review the Physical Demands/Working Conditions Tab**



a. **Review the Physical Demands/Working Conditions Tab and make any changes you deem necessary on this tab.**

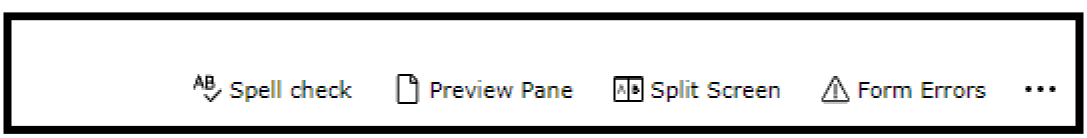
b. **Click on 'Save'** to save information entered.

c. **Click on 'Previous'** to move back to the 'Qualifications' Tab if you wish.

d. **This is the last tab requiring your review.**

Workflow Action Buttons:

1. **Workflow Action Buttons:**



a. You can review **Form Errors** by clicking on 'Form Errors' on the top left on the screen. These indicate where you have information missing within the Workflow.

   i. Once you have corrected any errors, click on 'Save' and you will get a message: 'Saved OK' Job Description Saved. Click on 'OK'.

   ii. To close if you are not making any changes, click Form Errors again or the X in the top right corner.

b. From the **'Preview Pane'** you can download the job description to Word, PDF Format, view it in a popup HTML window or share with others (see icons in Preview Pane, top middle).

   i. To close, click Preview Pane again or the X in the top right corner.

c. The **Split Screen** option is available to review your job description with another job description in the Job Library.

   i. Search for a job using the Search function. Select the job you wish to compare and click **"Select and Close".**

   ii. This will show you a split screen of both workflows to view simultaneously.

   iii. To close, click Split Screen again or the X in the top right corner.

d. Click on **Discard Draft** to delete the workflow if no longer needed.

e. Click on **Workflows** and then **Workflow Details** to review the approval steps and add or replace a participant with the same role in any step. See the Job Training Modules for more information.

f. Select **Compare Jobs** to compare your job with another job in the Job Library that has already been approved.

   i. Primary Job: The workflow you are currently in and working on.

   ii. Secondary Job: Select a job to compare your workflow to.

   iii. Set 'toggle button to 'Only selections with changes to compare your version and previous versions, either in a 'Merged Changes' format or 'Side-By-Side.

   iv. To close, click on the X in the top right corner.

g. Click **Show the Workflow Status** to see the approval route stops and add or replace a participant with the same role in any step. See the Job Training Modules for more information.

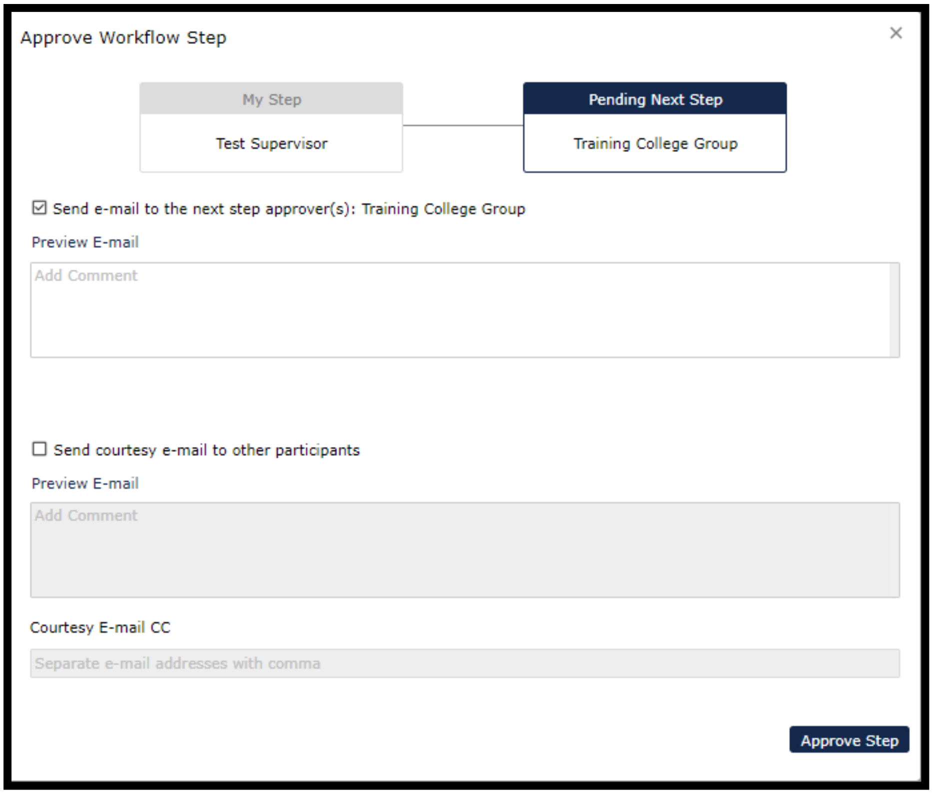
h. Click **Show All Comments --** all comments by any approver at any route stop are available to be viewed on this tab.

Approving and Rejecting/Returning a Workflow:

1. **Approving a Workflow**

   a. To approve your workflow step, click on the green 'thumbs up' icon in the top green Actions column.

   b. A Workflow Approval Step screen will appear where you can see yourself in the "My Step" box and the next approver in the "Pending Next Step" box.



c. **Send e-mail to the next step approver**(s): is automatically checked to send an email to the next approver in the routing queue.

   i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.

   ii. Click on Preview Email to view the email.

d. **Send courtesy e-mail to other participants**: will <u>**not**</u> be automatically checked but you can check this box to send an email to all approvers at every route stop to notify them you have approved the workflow.

   i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.

   ii. Click on Preview Email to view the email.

e. **Courtesy Email CC:** You can add courtesy email participants, separated by a comma, here to be copied on the emails if they are not listed in the approval queue but need to be notified.

f. **Click 'Approve Step'**. System will generate email to next level approver. Click 'OK' to close the wizard.

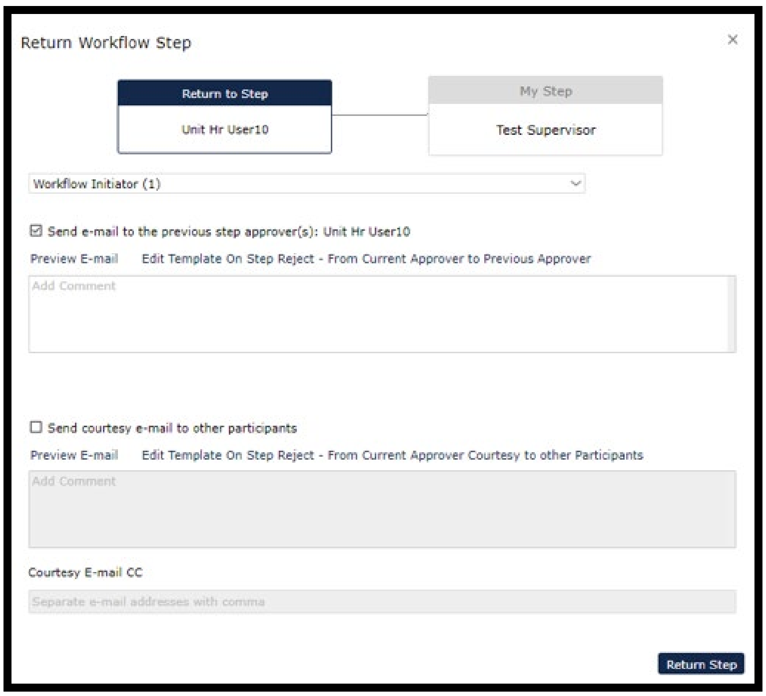
   i. Under Tasks on the main homepage, the approvers in routing queue will have the workflow for review.

ii. Once all approvers have approved the workflow, the job description will be reviewed and approved at the Classification stops and an email will be sent back to the Workflow Initiator indicating the workflow has been fully approved.

2. **Rejecting/Returning a Workflow**

a. To reject/return your workflow step, click on the green 'thumbs down' icon in the top green Actions column.

b. A Return Workflow Step screen will appear where you can see yourself in the "My Step" box and the person you are returning the workflow to in the "Return to Step" box.



c. In the dropdown list, you can select which approver you wish to send the workflow back to. Please Note: If you do not make a selection, it will default to the Workflow Initiator and every approver at every route stop will have to re-approve the workflow.

d. **Send e-mail to the previous step approver**(s): is automatically checked to send an email to the person you have selected to reject the workflow to.

i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.

ii. Click on Preview Email to view the email.

e. **Send courtesy e-mail to other participants**: will not be automatically checked but you can check this box to send an email to all approvers at every route stop to notify them you have rejected/returned the workflow.

i. Click on Add Comments to add any additional information to the email. These comments will be added to the end of the email template.

ii. Click on Preview Email to view the email.

f. **Courtesy Email CC:** You can add courtesy email participants, separated by a comma, here to be copied on the emails if they are not listed in the approval queue but need to be notified.

g. **Click 'Return Step'**. System will generate email to the person you have selected to return the workflow to. Click 'OK' to close the wizard.

i. Under Tasks on the main homepage, the approvers in routing queue will have the workflow for review.

ii. Once all approvers have approved the workflow, the job description will be reviewed and approved at the Classification stops and an email will be sent back to the Workflow Initiator indicating the workflow has been fully approved.