JDXpert

Management Training

Compensation

Jefferson Lab

U.S. DEPARTMENT OF ENERGY | Office of Science

JSA

What is JDXpert?

- A database program that allows Jefferson Lab to store, edit, and download existing Job Descriptions.

- A centralized location that houses thousands of Job descriptions that you can use when generating a new one.
  - Ex: looking to hire an Accountant, JDXpert has hundreds of different types of Accountant Job Descriptions at all levels from entry level to upper management.

- A system that links Job Descriptions to each employee, allowing management to quickly find the Job Description for each employee

- A tool to aid supervisors in locating, editing, or building a new Job Description

- While there isn't a direct interface to PeopleFluent, the created job description can be exported and then copied to PeopleFluent to begin the job positing

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Why is JDXpert needed?

- Job Descriptions are a dynamic document which must be proactively reviewed and updated as organizational needs change and roles evolve at the Lab.

- Job Descriptions will be the foundation of a new job classification system.

- We currently have a gap in Job Descriptions.

- Once JDXpert is fully loaded, it will make creating, editing and updating Job Descriptions much easier and give management a much higher level of visibility for what is expected of their employees.

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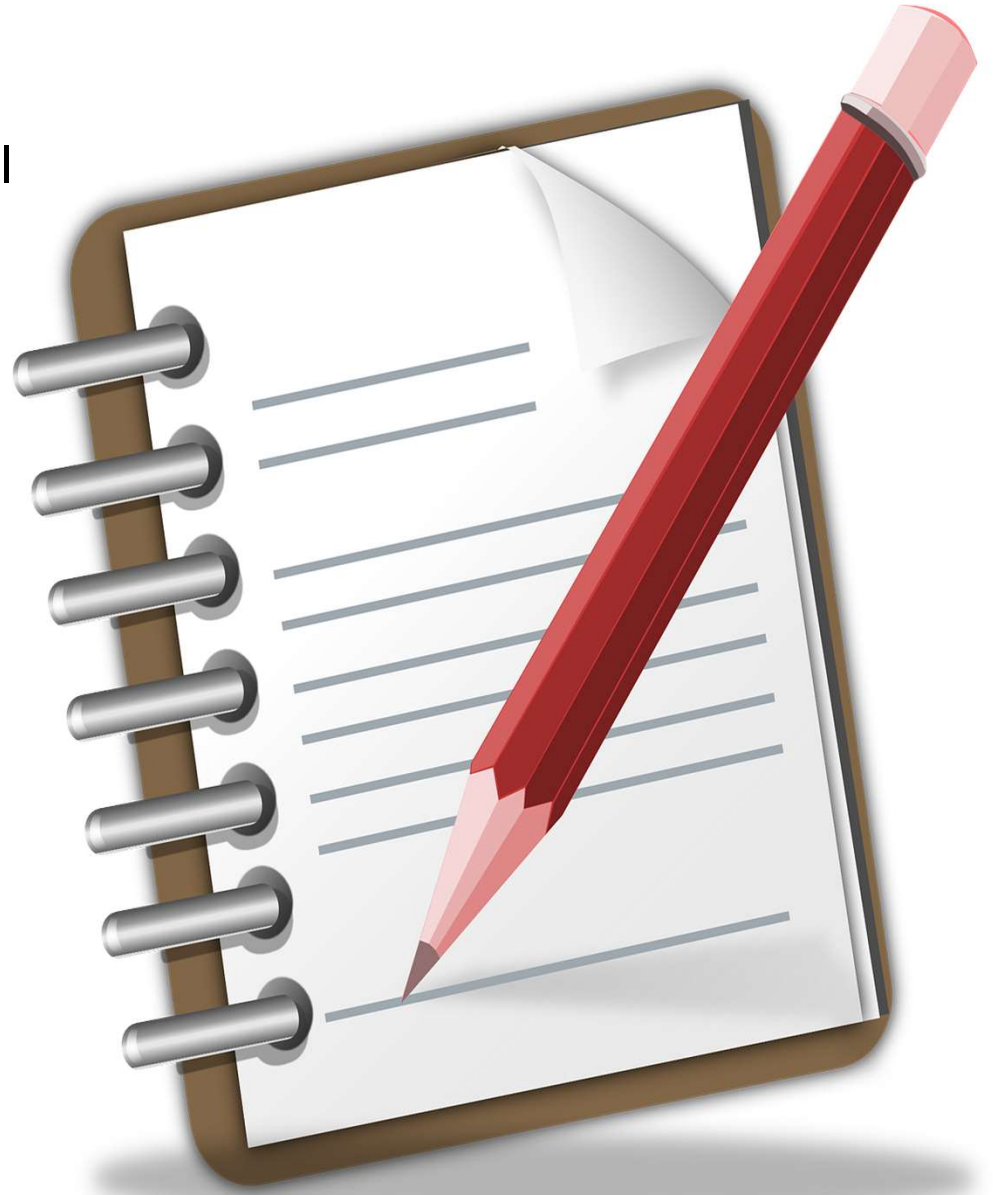
Access to JDXpert

- JDXpert is a web-based program, a link will be provided
    - Single sign on is not available

- Currently, access is limited to supervisors
    - Links to view job descriptions can be sent to employees

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Next Steps

- Obtain Job Descriptions for those employees who do not have one on file
- Audit conducted in 2022-2023 to locate and match all employees to existing Job Descriptions
- ~80 employees do not have a Job Description, or that we are unable to match a Job Description that we have on file
- Job Descriptions missing by division

Accelerator	38
CFO	1
COO	5
CPO	0
Engineering	6
ESH	2
Physics	21
Facilities	1
CST	8
Theory	1

- All missing Job Descriptions in JDXpert by November 2023

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Next Steps (cont.)

- December 1, 2023 all new (or edited) job descriptions must be created in JDXpert

- By January 31, 2024 supervisors need to review all other job descriptions for their employees for accuracy

- Recommendation is to review the job description with your employee during their annual review

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Tutorial: Using JDXpert

- Home page once logging into JDXpert.
- Quick links located on the right-hand side, and various options on the left-hand side

Quick Links

Revise Job Edit a current Job Description

Career Ladder Allows you to view and compare job families side by side. For example, view an Accounts Payable Clerk vs. Accounts Receivable Clerk

Job Library Allows you to view existing Job Descriptions

Add Job Create a new Job Description

Quick Links

Import Dashboard

Job Exports

My Jobs

My Employees

View My Job

Add Job

Revise Job

Job Library

Matrix

Career Ladders

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Job Library

Recently Viewed Description will need to be "X" before searching for your JD

The Job Library gives you access to any JLab Job Description already in the system. You can search for a Job Description by "Job Code" or "Job Description Name"

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Career Ladder

Select Career Ladder

Accounts Payable ⌄ 〔 ··· 〕

Accounts Payable

Administrative Support

Benefits

Budget

Business & Finance

Business Development

Chemistry

Clinical Services

Select a family from the dropdown

View the differences in each job description side by side or in Excel.

Export as Excel

Job Family: Budget

Budget

Job Family Group: Finance & Accounting

Finance & Accounting

Summary

Reporting to a Budget Analyst, incumbent develops annual budgets and performs variance analysis and forecasting of Lab financial information to ensure effective cost and funds control. Assists in the development of financial reports for Lab wide use.

Principal Responsibilities

	Budget Analyst ✕	PMI Administrative Assistant ✕	Budget Analyst ✕	Budget Analyst ✕	Mgr of Budget & Program
Responsibility Statements		• Working with the Deputy Director for Science, plan, execute and document semiannual Program Advisory Committee meetings, to include: Develop agenda, prepare necessary materials and post information for participants Arrange and reconcile travel Manage logistical support for the meeting including catering Monitor and administer budget	• Responsible for analyzing and reporting Lab financial information. This includes, but is not limited to: Interfacing and coordinating with Project and Activity Managers to assist in annual budget development, monthly cost reports/charts, and any other financial data requested by the Project/Activity managers. Maintenance of and	• Responsible for analyzing and reporting Lab financial information. This includes, but is not limited to: Interfacing and coordinating with Project and Activity Managers to assist in annual budget development, monthly cost reports/charts, and any other financial data requested by the Project/Activity managers. Maintenance of and	• Maintain knowledge of state, and Jefferson L procedures, and budg requirements to ensu complete, and accura submissions and comp funding guidance. • Participate in program discussions/actions ar of their impact on cur

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Add A Job

When adding a new job, you can start with "Blank Job" or "Select Base Job".

If you choose "**Blank Job",** you have to input every piece of information, starting with a new job code and new job name. Job code will be the position ID that HR uses in order to identify the job.

If you choose **"Select Base Job",** you can choose a job description that already exists at Jefferson Lab, or choose a Job Description from JDXpert's expansive list of already loaded Job Descriptions.

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Add A Job: Blank Job

Give your blank job description a Job Code (reach out to compensation@jlab.org for this), Job Name, select New Job Workflow, and assign the appropriate approvers.

- Direct Manager – the supervisor of the job (this may be you)
- Indirect Manager Review – the supervisor's supervisor
- Compensation – Jeffrey Mathis or Ken McLean

Click "Start Workflow"

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Add A Job: Blank Job (cont.)

Job Workflow Start Report

Job Revision Workflow(s)

Action	Job
✏️ 📋	AP - Test

Click the "Pencil" icon

Enter the basic information

STEP 1: *Complete the indicative information about the job below. Click on the blue questio each item.*

JOB INFORMATION

Job Description Name:	AP - Test
Job Title:	
Job Code:	AP - Test
Position Level:	⋯
Classification:	⌄
Grade:	⌄
Reports To:	⋯

ORGANIZATION

Division:	⌄
ⓘ Department:	⌄
Group:	⌄

HR JOB INFORMATION

Last Revised:	1/1/1900 12:00:00 AM
Approved Date:	1/1/1900 12:00:00 AM

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Add A Job: Blank Job (cont.)

Job Information

Job Summary

Essential Job
Functions

Qualifications

Physical
Requirements

Position Matrices

Scope

Compensation
Information

Job Posting

FLSA

Approvals and
Comments

Data Entry Tracking

Print Template

Using the menu on the left side of the program, enter information for each section

Global Search

If a section has the "Global Search" button, you can get suggestions from JDXpert

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Add A Job: Blank Job (cont.)

Global Search

Sources

The Global Search defaults to JLab, but clicking on Sources give you more options

☑ Company Jobs

☐ Sample Jobs

☐ Crowd-Sourced Jobs

☐ Job Postings

☐ Mentor junior engineers and technicians

☐ Develop and provide comprehensive training on the 5/8 and 13 kW test stand use and evaluation

☐ Maintain gas supplies to meet the needs of the cavity production team

☐ Document work as internal publications, e.g. Tech Notes

By selecting options, these can be added to your job description, and edited later.

Add to Job

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Add A Job: Blank Job (cont.)

Workflows ⌄
Start Express Workflow

Workflow Details
Workflow History
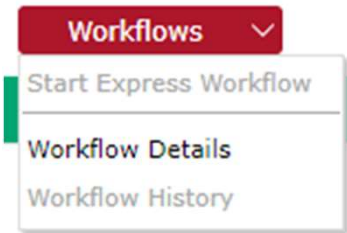
When the job description is complete, click on Workflows and select Workflow Details

Approve

Click the approve button
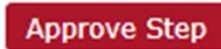
Approve Step

Click the approve step button

OR

Click the thumbs up to approve

Your newly created job description will be reviewed, per the workflow, by Compensation

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Add A Job: Select Base Job

Search Jobs for

☒ All Job Families and Sub-Functions ⌄ 🔍   Reset Search

▤ Sources

If you choose to work off of a Base Job, you can search for a JLab job or use another source.

Save and Close

Once you have found your source job description, click the save and close button

From here, follow the same steps as if you had chosen a black job description, except you will get to do more editing and less creating.

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FAQ

Q: Can I edit Job Descriptions after they have been loaded into the system?

A: Yes, you can easily edit and preview any Job Description anytime. Use the Job Management link, and search based on Job ID or Job title.

Q: I need to create a Job Description for a brand new position, where should I start?

A: When creating a new JD, you have a few options.
- First, start by checking the Compensation webpage to see the Job Description templates located here, Job Description Guidance | Jefferson Lab (jlab.org)
- Pull an existing Jefferson Lab description to see how it is written that may be similar, and some of the specific job functions that go with that job
- Or use JDXpert's expansive Job Description library of thousands of different job titles at various levels to pull from

Q: Do I need to update the salary range for the job?

A: No, Compensation will update the salary ranges for all jobs every time there is an update to salary ranges

Q: Do I need to enter the salary range when creating or editing a JD?

A: No, the salary ranges are stored in JDXpert and based on the classification level.

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FAQ (cont.)

Q: How does this link to the matrix?

A: The Classification Matrix is not visible within JDXpert. When developing/editing a job description, like today, the creator will need to review the matrix to ensure consistency.

Q: When will a supervisors have access to JDXpert?

A: Supervisors will receive an email from compensation within 24 hours of this training with login instructions.

Q: How will a supervisor know if a job description is approved?

A: Supervisors will receive an email indicating that a job description has been approved or if changes are necessary. Compensation's goal is to have these approved within two business days.

Q: Do I have to be connected to the VPN to use JDXpert?

A: No, JDXpert is a website that can be accessed from anywhere. The website is whitelisted so that you can access it if you are on the VPN.

Q: Where can I find additional information?

A: The compensation website has a page dedicated to job descriptions. On this page you will find a manual, a link to JDXpert, the training slides, and a FAQ.
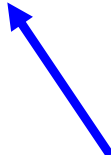
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Getting Started

New to JDXpert?

If you are a first time user and you are ready to get started with the onboarding process, signup for Onboarding to get started!

Signup for JDXpert Onboarding

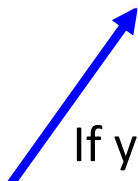If you haven't used this help feature, click on the signup link.

Continuing the Onboarding Process?

If you are a returning user, continue with your JDXpert onboarding experience by returning to the Onboarding course!

Continue Your JDXpert Onboarding Experience

If you have used the help feature previously, click on the continue link.

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Getting Started (cont.)

Select the training that
you would like to take.

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