

# THE JDXPERTNEWSLETTER

October 2022



## THIS JUST IN: JDXPERT SOFTWARE AND HOSTING UPGRADES

This fall and winter, we will continue to upgrade JDXpert customers from V1 to V2. We have listened to your feedback, iterated, improved, and debugged, and we're now ready for the grand reveal.

Our new platform will feature many added benefits, including a fresh look and feel to the user interface, migration of critical forms, fully-tested software, and a best-practice approach to configuration that aligns with current processes and workflows.

### IN THIS ISSUE

JDXPERT SOFTWARE AND HOSTING UPGRADES	1-2
JOB FAMILIES AND SUBFAMILIES	3-4
PASTE LIST	5-7
UPCOMING EVENTS	7

## IMPORTANT INFORMATION ON JDXPERT SOFTWARE AND HOSTING UPGRADES (continued)

### IBM to Microsoft Azure Hosting Migration

We have been building out our Azure environment for over a year now. Since the beginning of 2022, all new JDXpert customers have been hosted in Azure, so we are confident that our hosting center is proven and ready to roll out to the rest of the client population.

To ensure the best possible hosting environment to [support the V2 release](#), we will migrate all clients from our current IBM hosting center to Microsoft Azure.

For us, the decision was quite straightforward. Our research showed that Microsoft Azure is among the top SaaS infrastructure providers in today's tech landscape. We needed an agile platform that would grow with us into the foreseeable future, and Azure fit the bill perfectly.

### About the JDXpert V1 to V2 Upgrades

We will continue to roll out V1 to V2 upgrades starting this fall. Updates will be performed individually for each client, and to ensure a seamless transition, additional staff have been assigned and dedicated to the process. We expect to ramp up to 20-25 upgrades per month and complete the migration by the end of the 2022/23 winter season.

### What to Expect in V2

Here's what you can expect to see and experience in JDXpert V2:

#### A Fresh New Look

A critical part of the V2 release is offering a cleaner, simpler, and more consistent approach to displaying information and forms across all modules.

#### Migration of Key Forms

Over 180 forms have already been updated, with more to be included in subsequent releases.

### Fully-Tested Software

All forms have been rigorously reviewed and tested to ensure a smooth and seamless transition to V2.

### A Best Practice Configuration Approach

V2 introduces a range of new best practice configurations to make the functions in V2 more intuitive and easier to use and understand.

### What's Next for the Development Team?

This fall, our development team will deliver a new version of Acknowledgements. The update will simplify the configuration, management, and use of Acknowledgements.

Next, we'll expand the JDXpert Express Editor to meet the needs of a best practice JDXpert implementation. The ultimate goal is to make job description configuration much faster and workflows easier to manage for all stakeholders.

[Contact your Customer Success Manager](#) if you have any additional questions or concerns. We are always happy to help!





## REVIEW OF: JOB FAMILIES AND SUBFAMILIES

### Why are Job Families and Subfamilies Important?

Organizing jobs by family and subfamily not only helps keep a job description repository organized and easy to reference, it also helps HR make more informed recruitment, training and compensation decisions.

### Getting Started

When it's time to setup your job families, go to Administrative Tools and click on Job Families. From here, you can choose to import your job families via the Import icon on the right side or add them manually by clicking "Add". On the right is a tree view showing each job that is categorized under that family or subfamily. To add a job, simply click on Add Job(s) and select the appropriate job and then Select and Close.

## REVIEW OF JOB FAMILIES AND SUBFAMILIES (continued)

### How Do I Add or Delete Subfamilies?

Once your job families and subfamilies have been established, and you'd like to delete or add additional subfamilies, go to Admin Tools and click the edit icon next to the family you'd like to edit. When the pop-up appears, go to the Sub-Function tab and click the Add button to add a subfamily or Delete from the 3 dot icon next to the subfamily you want to delete. Then click Save and Close.

### Matrix View

One of our clients' favorite features is our Matrix Viewer because it allows HR/Compensation to view jobs in a way they find compelling. Job families are tabbed across the top and subfamilies are listed as individual columns. The jobs are ordered in this matrix by grade so you can see how jobs in a particular job family play out by grade. You can also drill down and select items that you want and view them, by using the side-by-side view.

### Career Ladders

Career ladders are simply side-by-side views that you configure to provide career laddering information to stakeholders throughout your enterprise. After entering Career Ladders from your home page, select a subfamily and either generate a report in Excel for distribution or view them side-by-side. Like other places in the system, these career ladders are configurable by you, but we recommend including sections like the summary, responsibility statement, and scope.

### JDXpert is Here to Help!

Our training module and Knowledge Base include step-by-step information on how to setup your job families and subfamilies. However, your Implementation Specialist will be on hand during Onboarding to guide you along the way.

### Configuration and Interface with Other Systems

Following Onboarding, our clients move on to their Enrichment phase with our Customer Success Team. During the Enrichment phase, your interfaces and integrations to other systems are completed.

The screenshot displays the JDXpert Admin Tools interface. The main content area is titled 'Jobs Administration : Job Families (Auth Settings: Admin\_JobFamilies)'. It features a 'Manage Job Families' table with columns for Action, Job Family Name, # Job Descs, and Description. Below the table, a list of subfamilies is shown under the heading 'Administrative Services'.

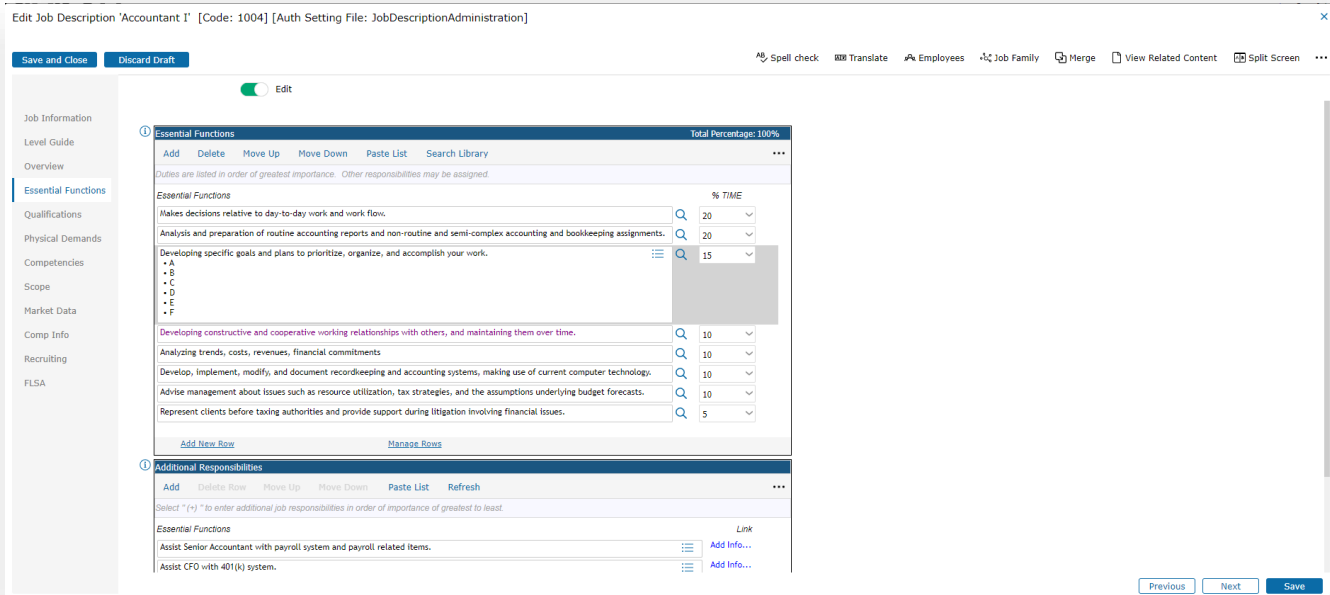
Action	Job Family Name	# Job Descs	Description
	Administrative Services	19	This family includes all classes of positions the duties of which are to correspondence, and secretarial work; mail and file work; the operation of equipment; the operation of peripheral equipment, mail processing and
	Advisory	3	Job Family: Advisory
	Business Development	56	The family encompasses positions responsible for identifying new business extend programs and services in order to realize a profit. Positions at development of innovative business opportunities.
	Clinical - Nursing	34	Job Family: Clinical - Nursing
	Communications & Public Affairs	16	Positions in this Job Family engage stakeholders in order to explain the information, and lobby on issues which could impact the organization
	Contracts & Procurement	35	This family includes positions that manage, perform, or develop policy construction, or R&D using formal advertising or negotiation procedure administration or close out of contracts. The work requires knowledge
	Customer Service & Support	24	This Job Family has positions that interact with customers for their immediate, technical support, and training.
	Cyber Security & Analysis	29	Positions in this Job Family protect systems and networks from cyber- integrity or confidentiality of data or software; deny access to systems, networks, and equipment.
	Data Management	16	This family covers positions that design, install, maintain, and upgrade in the use of database technology and are accountable for the overall
	Education	0	This Job Family Supports Education Jobs Details to Follow
	Engineering - Development	40	This family covers positions managing, supervising, leading, and/or p family covers technical positions that require primarily application of i engineering or architecture; and (2) the construction, application, pro
	Engineering - Infrastructure	11	This family covers positions managing, supervising, leading, and/or p covers technical positions that require primarily application of a pract engineering or architecture; and (2) the construction, application, pro
	Engineering	16	This family covers positions managing, supervising, leading, and/or p covers technical positions that require primarily application of a pract engineering or architecture; and (2) the construction, application, pro
	Enterprise Resource Planning	30	Positions in this Job Family integrate internal and external management finance/accounting, sales and service, customer relationship manager software applications. The purpose of ERP is to facilitate the flow of inf

Administrative Services

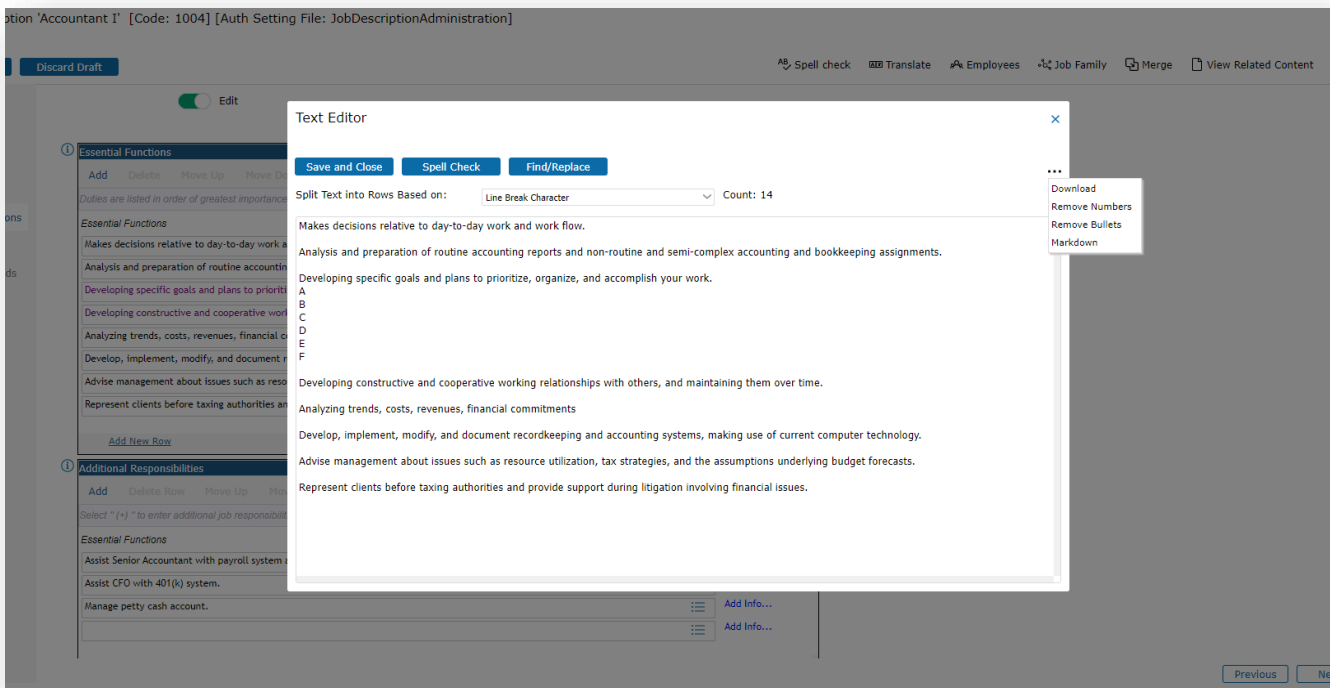
- Administrative Services
  - Administrative Support
    - Administrative Assistant
    - Administrative Clerk
    - Administrative Services Manager
    - Associate Administrative Assistant
    - Associate Administrative Clerk
    - Entry Accountant
    - Executive Assistant
    - Manager - Administration
    - Office Administrator
    - Receptionist
    - Senior Executive Assistant
    - Senior Executive Assistant & Operational Support
  - Internship
    - Intern
    - Senior Intern
    - Senior Technical Intern
    - Technical Intern
  - Research
    - Associate Research Coordinator
    - Research Coordinator
    - Senior Research Coordinator

# TIPS AND TRICKS: HOW TO PASTE LISTS

You can utilize Paste List in Essential Functions or other bullet list blocks to copy and paste multiple bullets at once and create sub-bullets easily. Here's how.



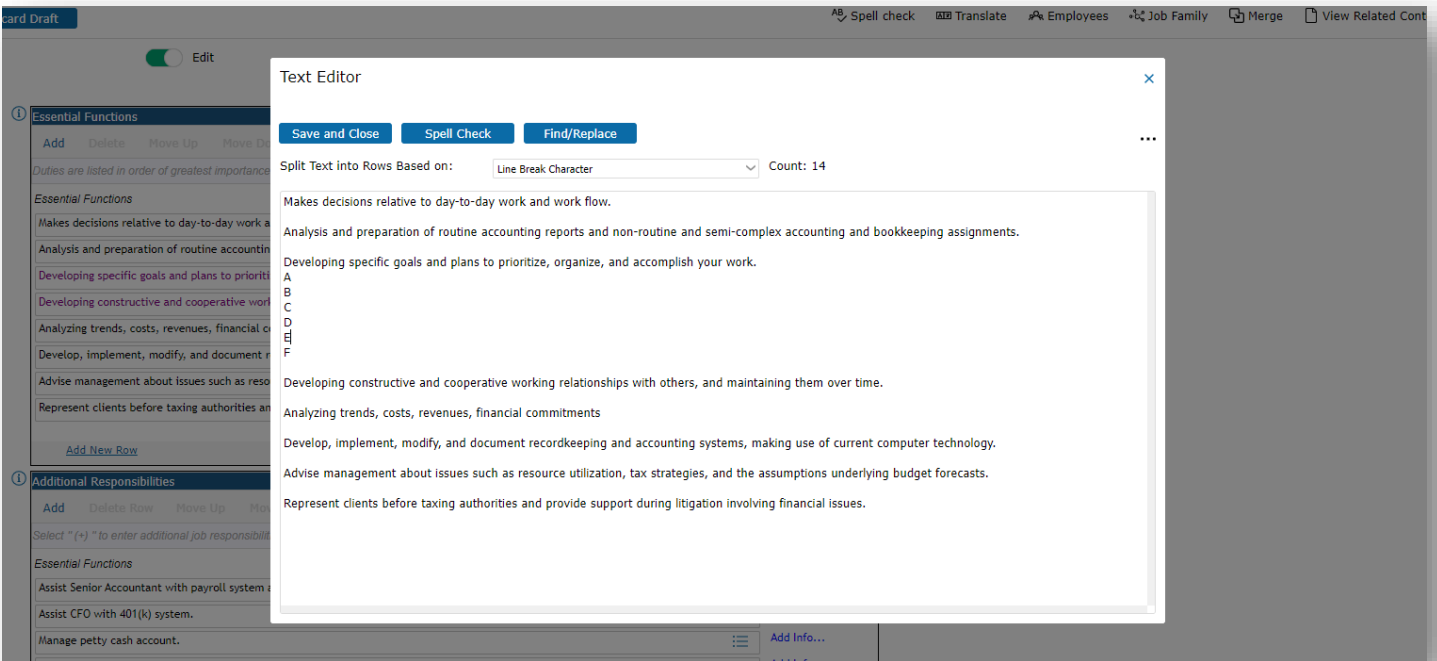
After copy and pasting text in to the "Past List" text editor, click the 3 dots (⋮) in the top right corner to populate a drop down and select either "Remove Bullets" or "Remove Numbers" to remove all numbers or bullets from the start of all bullet points.



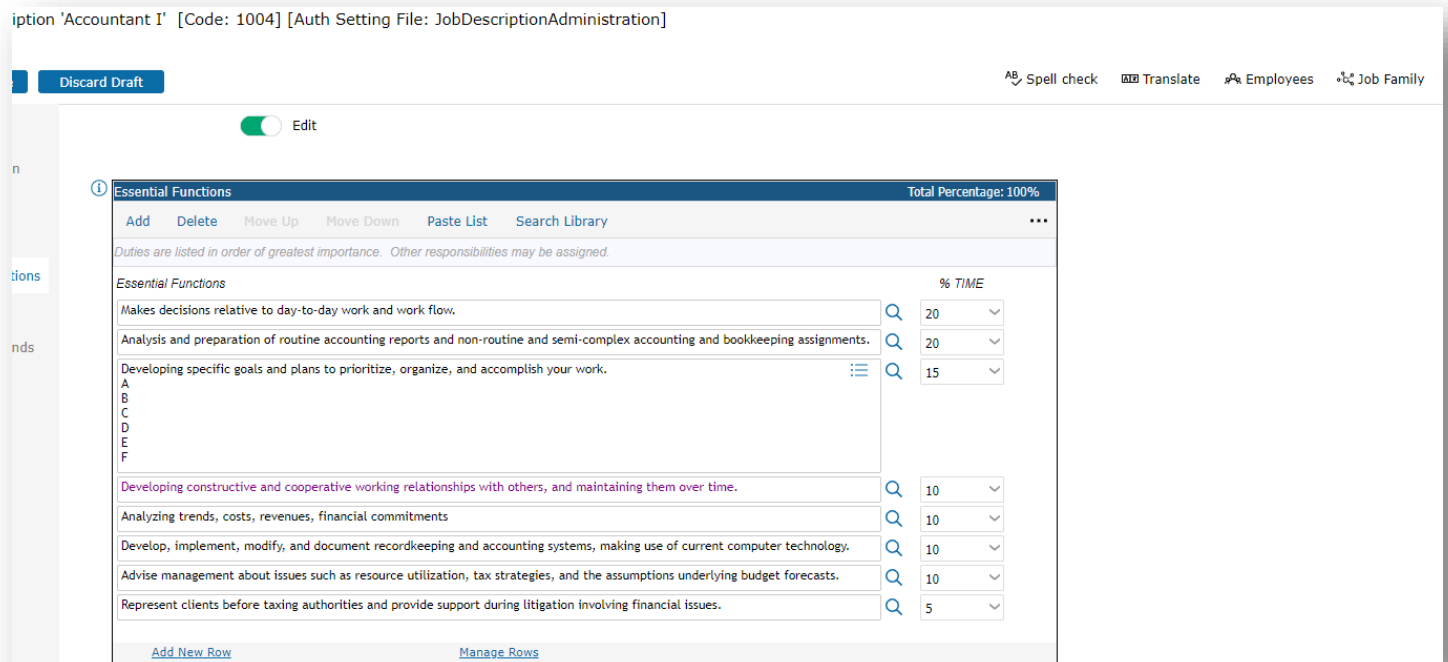
## PASTE LIST (continued)

To create sub-bullets, place a space after each bullet you want populated in JDXpert. Any sub-bullets should be grouped together with no spaces between each sub-bullet, only a space separating the sub-bullet group from the other bullet points, so they populate in 1 bullet point box in JDXpert.

Once the spacing has been completed, change the “Split Text into Rows Based on” dropdown to “Single Blank Line” and save and close. This will ensure that the paste list function reads the space between the bullet points as the bullet point separator.



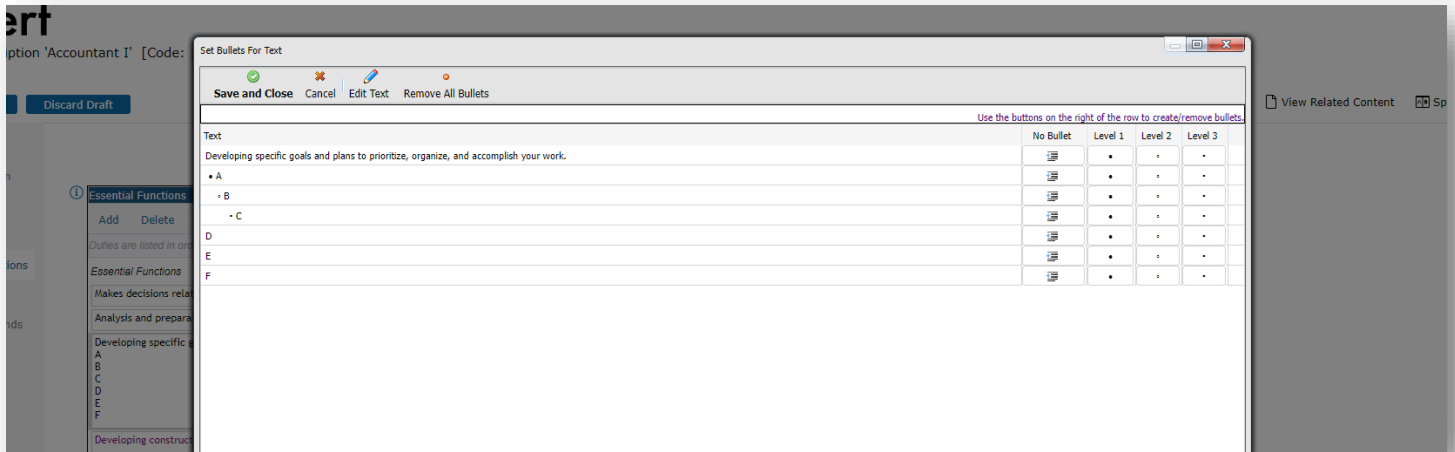
Once saved, any “sub-bullets” that have been grouped together will populate in a singular bullet box and 3 lines will populate in the upper right corner. If these 3 lines are selected, it will populate a form to set the bullet points for each sub-bullet.



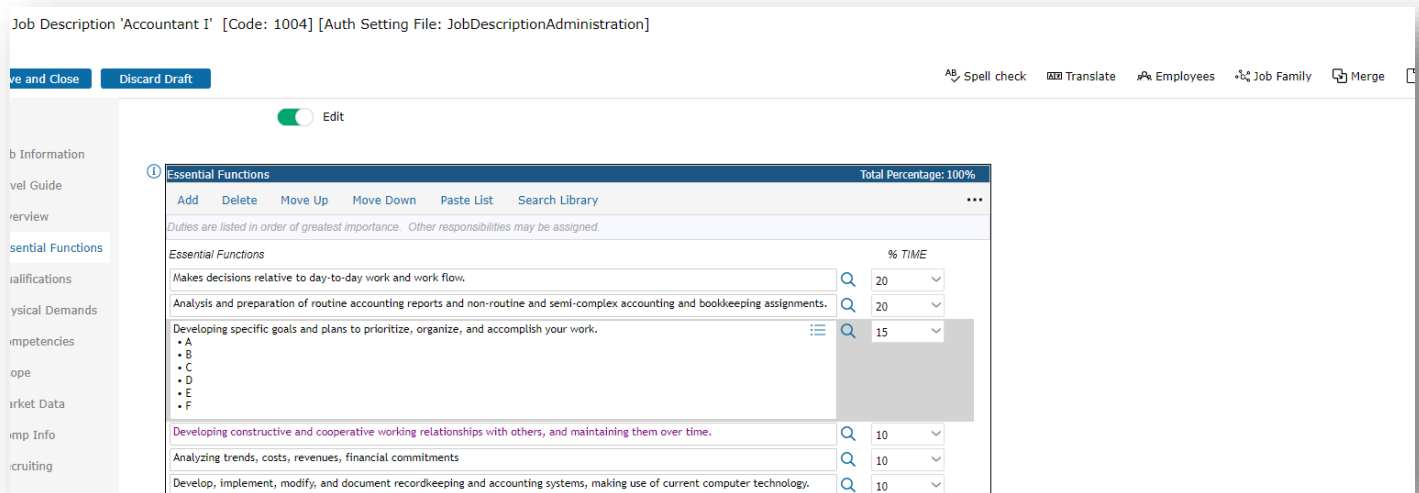
## PASTE LIST (continued)

See the spacing differences in the first 3 bullets. Once bullet points have been selected, select "Save and Close."

There are 3 options for bullets, Level 1 is a solid black circle, Level 2 is an open circle, and Level 3 is a small solid black circle. Each level also populates different spacing. Level 1 has no spacing, Level 2 spaces the sub-bullet one space to the right, and level 3 spaces the sub-bullet 2 spaces to the right.



The paste list function is a quick way to upload essential function bullets while also allowing for the possibility of adding sub-bullets.



# UPCOMING EVENTS

**Payscale Conference 2022**  
Virtual, October 19-20  
[Click here for more information](#)

Contact Customer Success at  
[success@jdxpert.com](mailto:success@jdxpert.com) with any questions.