



# **JOB EVALUATION AND JOB GRADING SYSTEM USER GUIDE**

**ISSUED BY THE MINISTER FOR THE PUBLIC SERVICE  
AND ADMINISTRATION**

**MAY 2024**

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## 1. System Outline

The Compensate – Evaluate job evaluation and job grading system is a five-factor scheme that includes the following factors and sub-elements within those factors.



© Compensate

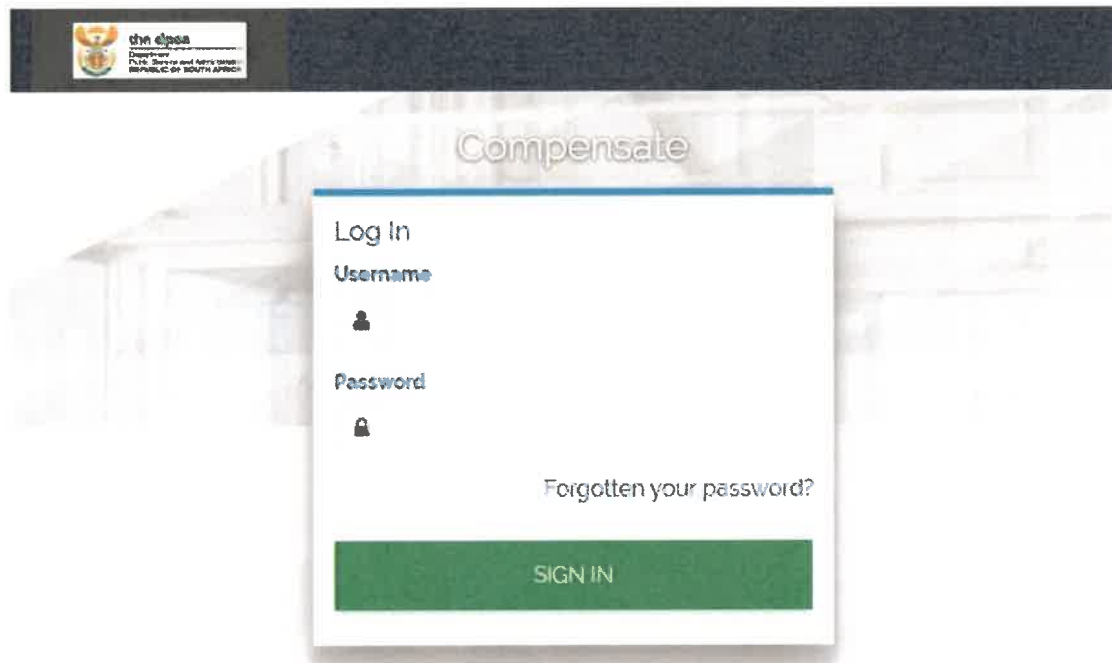
## 2. Accessing the System

2.1 The Compensate – Evaluate system is accessed via the following URL:

**<https://dpsa.zrs.zellis.com>**

2.2 All users have been allocated a Username and preset password based on their required access rights and permissions.

2.3 When you first access the system, you will need to change your password by using the '**Forgotten Password**' link as shown below.



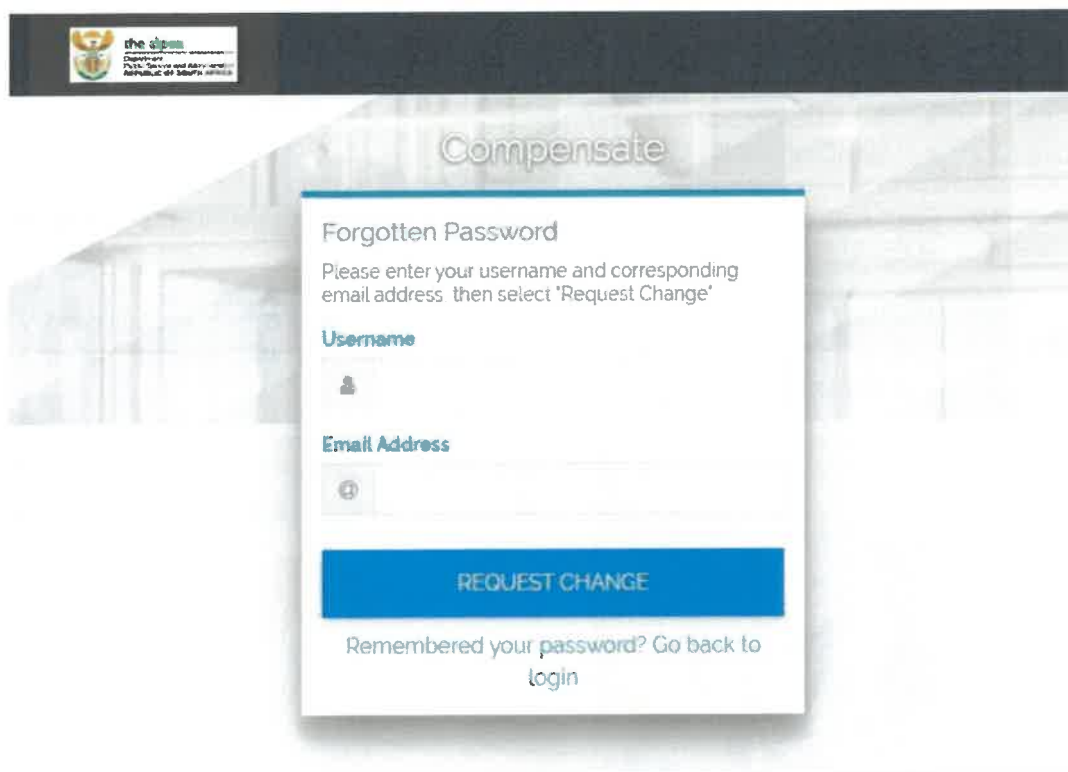
Clicking on '**Forgotten Password**' will take you to the next screen as shown below.

**Enter your Username and email address.** You will be advised of the format of your Username which will either be your email address or in a format defined by DPSA.

Enter your email address and click '**REQUEST CHANGE**'

A link will be sent to your registered email address; following the instructions to reset your password. Please check your Spam or Junk folder to see if the email has been sent to that folder as well as your usual email inbox.

The password must be at least 5 characters long and include at least 1 uppercase, 1 lowercase and 1 numeric character.



The screenshot shows the 'Compensate' website interface. At the top left is the logo for 'the gpm' (Department of Public Service and Administration of South Africa). The main heading 'Compensate' is centered at the top. Below it is a 'Forgotten Password' form. The form contains the following elements:

- Forgotten Password**: The title of the form.
- Please enter your username and corresponding email address then select 'Request Change'**: Instructional text.
- Username**: A label for the first input field, accompanied by a user icon.
- Email Address**: A label for the second input field, accompanied by an email icon.
- REQUEST CHANGE**: A blue button to submit the request.
- Remembered your password? Go back to login**: A link to return to the login page.

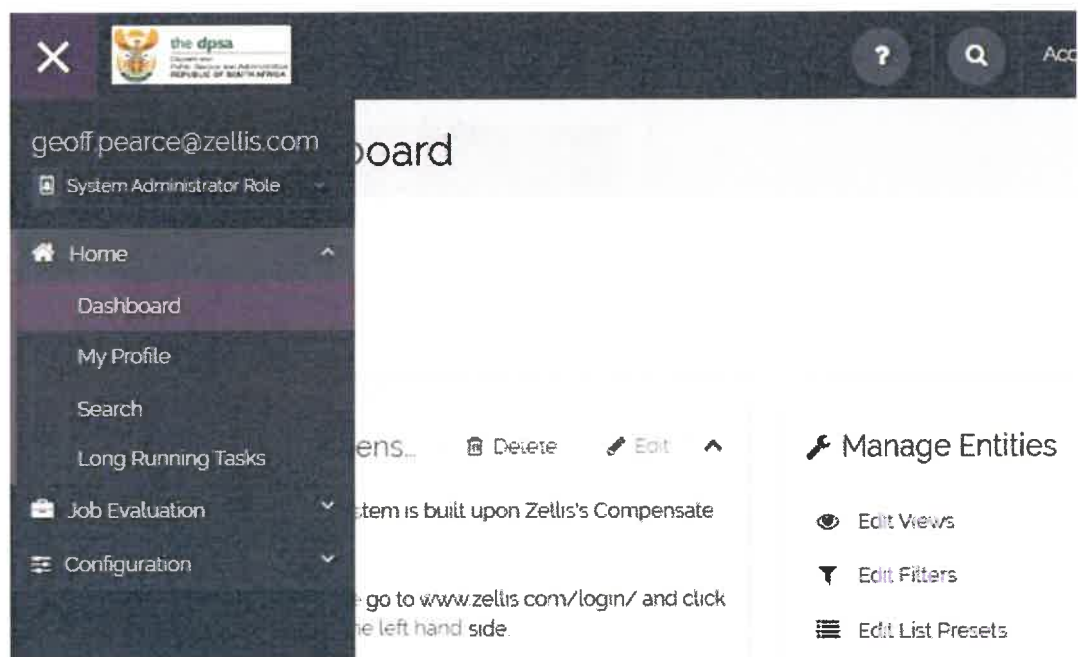
### 3. System Navigation Panel

3.1 System Navigation is undertaken using the Navigation Panel on the left-hand side of the screen. There are two dashboards:

- Home Dashboard
- Jobs Dashboard

3.2 The functionality that is visible to individual users will be dependent on their user privileges as assigned to them by DPSA.

3.3 The Navigation Panel is shown below. The Home Dashboard is open, and you can see a range of options. To open a Dashboard, click on the drop-down arrow and the relevant options will become available to you.



## 4. Home Dashboard

4.1 The Home Dashboard includes a range of features including:

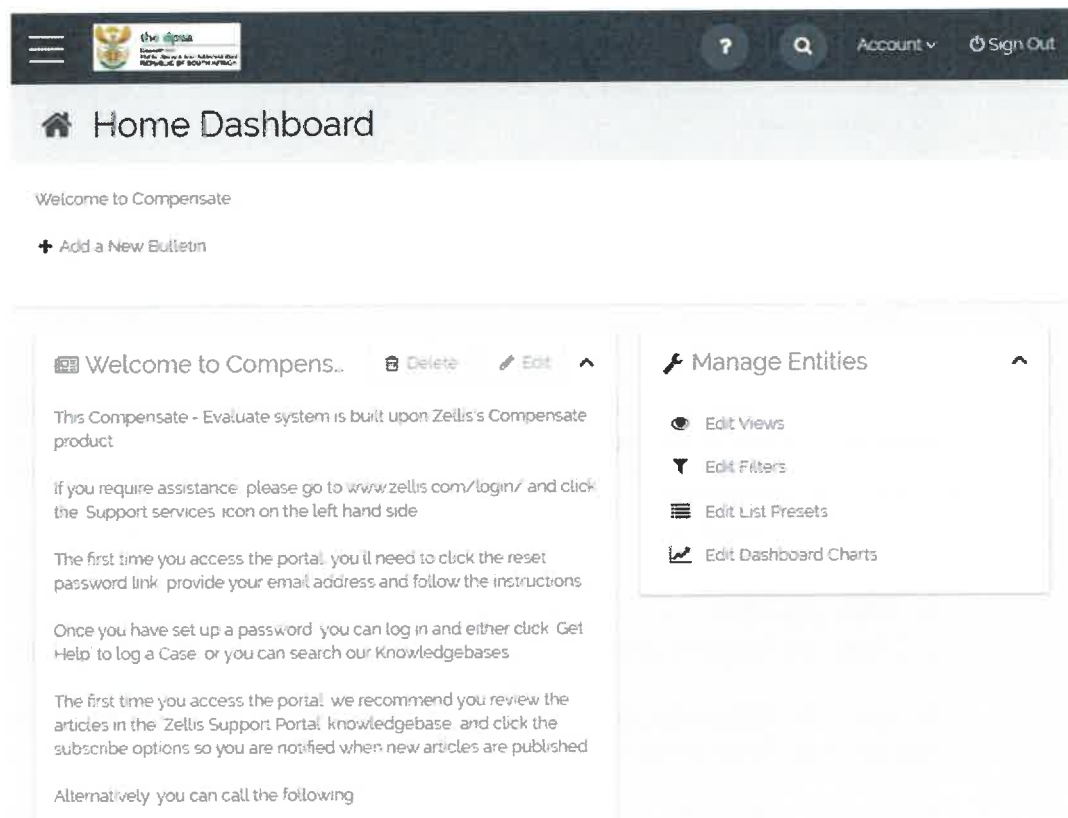
- Dashboard
- My Profile
- Search

### Dashboard

4.2 Clicking on the 'Dashboard' link will take you to the following screen where you can read how to access the Support Team or the key contacts within DPSA. The 'Dashboard' also gives you access to edit the following based on your level of access:

- Views
- Filters
- Presets
- Dashboard Charts

How to create and amend the above features is discussed in Section X of this guide.



## My Profile

- 4.3 The following screen will show your login and user details and also enable you to change your system password.

**the dpa**

Account Sign Out

### User Profile

User Profile

Geoff Pearce (Zellis)

Email Address	geoff.pearce@zellis.com
Messaging Email address	geoff.pearce@zellis.com

Show Help Text

#### Change password

**i**

Previous Password

Password

Save

## Search

- 4.4 The 'Search' facility enables you to locate jobs within the system that meet your specified criteria as shown on the screen below. You can search within Jobs, Users, Roles and Reports and look for your required information within:

- Identifiers (Job ID)
- Titles (Job Title)
- Texts (any additional information added in Comment boxes within the System Questionnaire)

To search the system type in the text you wish to search for, e.g., the Job ID or Job Title, e.g. Manager into the box called 'Enter Search Terms'.

There are a range of different tests that you can apply which are selected using the drop down arrow next to 'Containing' which is the default search term.



The three standard search terms are 'Containing', Ending with and 'Equal to'.

the dyma

Department of Health and Human Services

Ministry of Health and Human Services

?

Account

Sign Out

Q Search

🔑 Search Options

include

✓ Jobs

✓ Roles

✓ Users

✓ Reports

Containing

▼

Enter search terms

Examine

✓ Identifiers

✓ Titles

✓ Texts

Enter search criteria and options to begin a new search

🕒 Search History

^

No recent searches Your search history will appear here once you've searched for something

Q Search

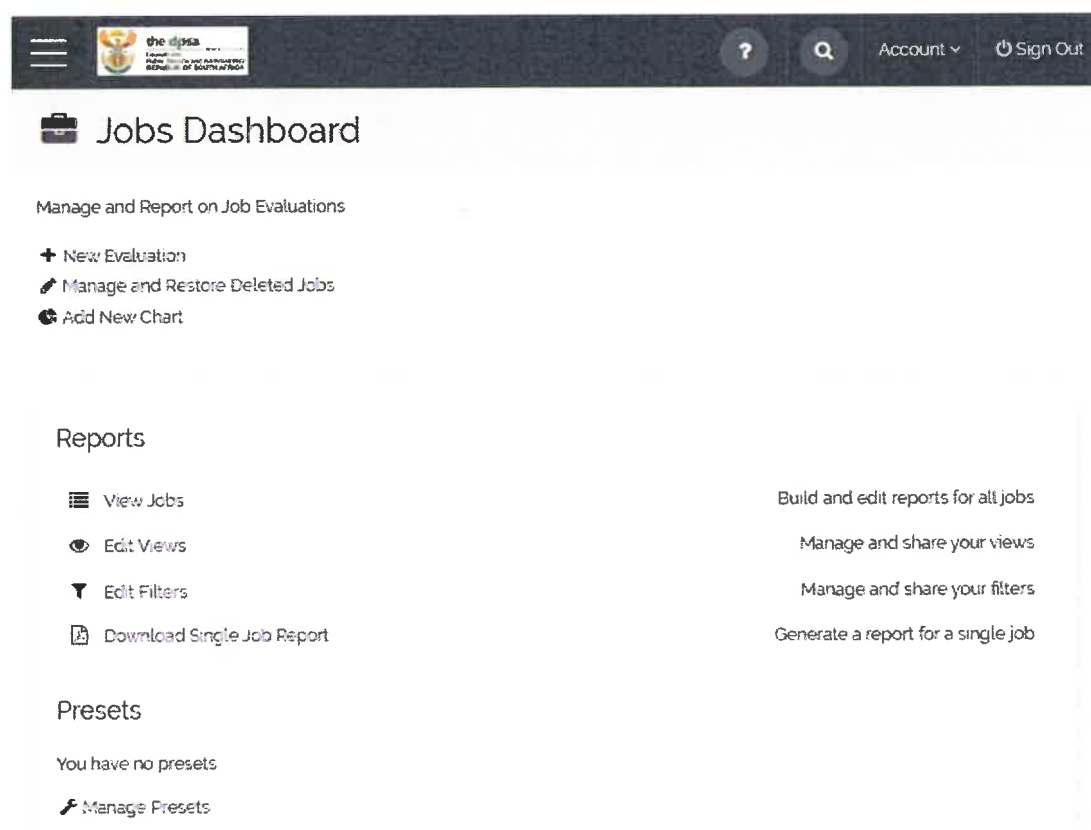
## 5. Jobs Dashboard

5.1 The Jobs Dashboard is the main section of the system for those evaluating jobs within their department and the most used part of the system. As in other parts of the system, the features that you have access to will be determined by your level of access.

5.2 The Jobs Dashboard includes a range of features including:

- New Evaluation
- Manage and Restore deleted jobs
- Adding New Charts

Within this section of the system you can also manage and report on evaluations using the system reporting tools including system filters. This is described in Section 7, 'Reporting'.



### New Evaluation

5.3 To undertake a new evaluation, click on 'New Evaluation' which will take you to the Job Information section which must be completed to enable you to access the system questionnaire that is used to complete the evaluation.

5.4 The Job Information screen includes the following sections:

- Section 1.1 – Interview Details
- Section 1.2 – Job Details
- Section 1.3 – Job evaluation summary
- Section 1.4 – Other
- Section 1.5 – Evaluation Prior to 2024 Review

**Section 1.1 – Interview Details**

5.5 Section 1.1 requires the following data to be added to the evaluation record:

- **Date of Interview** – select the date by clicking on the calendar icon.
- **Name/s of Interviewer/s** – type in the Job Analyst details.
- **Name/s and contact details of interviewee/s** – type in the contact details.
- **Input Date** – select the date by clicking on the calendar icon.
- **Method of Info Collection** – type in the method used to collect the information about the job, e.g., interview.

/ ID 38228

Navigation -

Job Information

1 Interview and Job Details

1.1 Interview details

Date of Interview	03-May-2024	📅	🗑️
Name/s of Interviewer/s	J Analyst		
Name/s and Contact Details of Interviewee/s	J Holder		
Input Date	03-May-2024	📅	🗑️
Method of Info Collection	Interview		

**Section 1.2 – Job Details**

5.6 Section 1.2 requires the following information to be added to the evaluation record:

- **Identifier** – this identifier is system generated and is the evaluation record number. A Departmental Job ID can be entered below.
- **Job Title** – Enter the Job Title.
- **Department Job ID** – Enter any local Departmental Job ID.
- **Current Grade (Salary Range, e.g. 1 – 16)** – Enter the current grade if this is an existing job.
- **National / Provincial** – Enter if this a National or Provincial Job.

A range of other job details can also be added to this screen outlining the job details, categorisation, and location.

## 1.2 Job details

Identifier	ID 38228
Job Title	Example Job
Department Job ID	
Current Grade (Salary Range, e.g. 1 - 16)	
National / Provincial	Not Set
National	
Chapter 9 Institution / National Department	
Provincial	
Province	
Provincial Department	
Component	
Location	
CORE	
Occupational Category	
Number of Posts	
Job Description	Edit attachment

- 5.7 The final feature of Section 1.2 is the ability to add a copy of the Job Description to the evaluation record. This is done by clicking on 'Edit Attachment' next to Job Description at the bottom of the screen.

When you click on 'Edit Attachment' you will see the following dialogue box:

Upload Attachment

Select

Click on 'Select' and you will be able to upload a copy of the Job Description from where you have it stored on your laptop or within a folder.

### Section 1.3 – Job evaluation summary

5.8 Section 1.3 requires the following information to be added to the evaluation record:

#### 1.3 Job evaluation summary

Preliminary Job  
Weight (After Input  
into JE software)

Preliminary Job Grade  
(After Input into JE  
software)

Job Weight - Panel  
Recommendation

Job Grade - Panel  
Recommendation

Preliminary job grade  
recommended by the  
DPSA

Job Grade Approved

Benchmark Type  
National

Benchmark Type  
Departmental

Public Service  
Benchmark

Archive Job No

Lock Job No

Last Modified Date 05-May-2024

5.9 The system will also record who the job was last modified by and includes a free text area to record 'Additional Information about the job.'

## Section 1.4 – Other

5.10 The information in Section 1.4 will automatically be populated by the system following the completion of the evaluation. This includes the following:

- Score – the total score for all five factors in the evaluation scheme.
- Grade – the grade determined by the total points score shown above.
- Job Owner – this is the level of the User that evaluated the job.

5.11 There is a drop-down menu associated with the 'Job Owner' field. By clicking on this arrow, you will see a list of which user type is able to view the record. In the example, the job has been evaluated by a System Administrator so may not be able to other users to view; this can be changed and will allow access to other users.

14. Other|

Score 0

Grade Default Grade

Job Owner System Administrator Role

## Section 1.5 – Evaluation Prior to 2024 Review

5.12 Section 1.5 requires the factors levels for the five factors in the evaluation system to be added, together with the previous score and grade.

15 Evaluation Prior to 2024 Review

Previous RP

Previous TD

Previous KN

Previous CM

Previous EN

Previous Score

Previous Grade

## Moving onto complete the job evaluation using the System Questionnaire

5.13 Once Sections 1.1 to 1.5 have been completed there are three options that you can select. These are shown in the bottom right-hand corner of the screen. The options are:

- Select Tracking Jobs
- Finish and Save
- Discard Changes

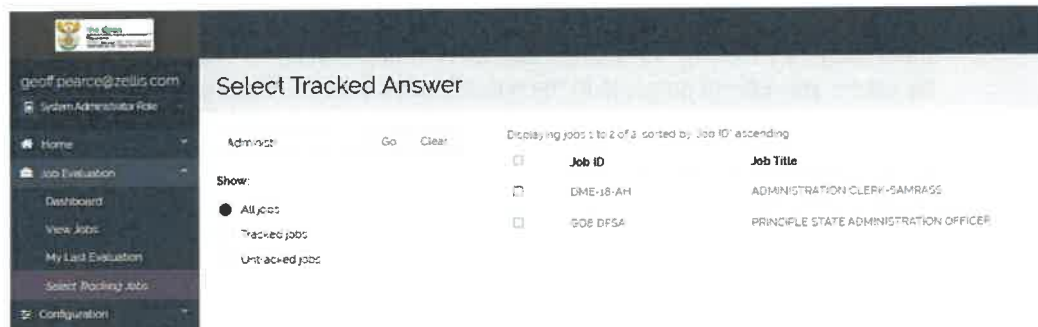


### Select Tracking Jobs

5.14 This option allows you to select other jobs that have been evaluated and compare the responses for the job you are evaluating to other jobs within the database. When you click on Select Tracking Jobs, you may see a warning message that says, 'Changes you made may not be saved'; it is okay to click 'Leave' and the system will take you to a list of jobs that you can select to track against.

5.15 You will see the following screen with a list of jobs that you can track against. You can filter down to a specific type of job by typing text into the Search box at the top of the screen.

In this example we have entered 'Administr', then clicked go and a list of jobs that contain that string of characters is then shown. When selecting jobs to choose from it is recommended that you filter against 'All Jobs' as shown in the screen below.



5.16 You can select multiple jobs that meet your criteria from the list that is displayed.

To select a job to track against, tick the check box next to the job title and then select 'Back to Questionnaire' at the bottom of the screen.

## Finish and Save

5.17 By clicking on 'Finish and Save', the job information will be saved, and you will be taken to the following options:

- Questionnaire evaluated.
- Discard.
- Save only.

The screenshot shows a web interface for finishing and saving a job. At the top, there is a dark header bar with a search icon, 'Account', and 'Sign Out' links. Below the header, the text 'Example Job / ID 38228' is displayed. A green navigation bar is visible. The main content area is titled 'Confirm detail changes' and includes the message 'You have finished editing this job, do you want to save it?'. There are three options presented as cards:

- Questionnaire Evaluated**: Evaluate this job using Point Factor Analysis (PFA) on a questionnaire. You will be asked a series of closed questions and your responses will contribute towards a score. A 'Save & continue' button is shown.
- Discard**: Undo these changes and discard the job. A 'Discard Changes' button is shown.
- Save Only**: Save these job data without evaluating. A 'Save & Close' button is shown.

**Questionnaire evaluated** – by clicking 'Save and Continue' you will proceed to the system questionnaire and be able to evaluate the job.

**Discard** – by clicking 'Discard', the changes you have entered to this section will be removed and the job discarded.

**Save Only** – by clicking 'Save Only', the Job Information that you entered in Section 1.1 to 1.5 will be saved; you will not progress to the questionnaire but can return to the questionnaire at a later stage. You could use the search facilities described in Paragraph 4.4 to locate the job, or if it is the last job you created, use the 'My Last Evaluation' button which is described in Paragraph 7.3.

5.18 To start the evaluation, click on 'Save and Continue'.



## **6. Evaluating a Job using the System Questionnaire**


6.1 The system questionnaire is divided into five sections, one for each of the five factors within the Compensate – Evaluate system. The five factors are:

- Responsibility
- Thinking Demands
- Knowledge
- Communication
- Environment

Each of the five factors is broken down into a range of sub-elements and there are questions related to each area that must be completed to create a full evaluation of the role.

The purpose of this User Guide is to illustrate how to use the system questionnaire as opposed to discussing the factors.

6.2 Once you have clicked on 'Save and Continue' as described in Paragraph 5.17 you will be taken to the Responsibility factor as shown below.



gryoff@seattleu.edu

System Administrator

- Home
- Job Evaluation
- Qualifications
- View Jobs
- My Last Evaluation
- Qualifications
- Compositions

## Example Job / ID 38228

Navigation

### 2. Responsibility

#### 2.1 Human Resources

The aim with the sub-element human resources is to determine the number and types of people whose work is overseen or managed (plan, organize, direct, control, etc.) by the jobholder as well as the nature of control/authority over those people. This sub-element considers employees managed directly and indirectly as well as other human resources managed or whose work is overseen.

**2.1.1 Is the jobholder required to manage (plan, organize, direct and control etc) human resources?** **NC**

*(a) This question requires a simple YES/NO response.*  
*(b) A YES response would indicate that the jobholder is required to manage/oversee/supervise employees or manage/oversee the work of other human resources. Employees would refer to those people appointed on the establishment of the department for which the jobholder has responsibility on funded vacant post that will be filled. Other human resources would however refer to any people (even and above the employees referred to above) whose work has to be overseen/managed by the jobholder.*  
*(c) A NO response would indicate that the jobholder is not required to manage employees or manage/oversee the work of other human resources as all. Questions 2.1.1 to 2.1.10 can therefore be ignored since they all deal with control/over human resources. The next applicable question would be 2.1.11 that deals with financial resources.*

#### Manage Staff Directly

**2.1.2 Is the jobholder required to manage employees DIRECTLY?**

*(a) This question requires a simple YES/NO response.*  
*(b) A YES response would indicate that the jobholder is required to manage/supervise employees directly. These employees would refer to those people appointed on the establishment of the department for which the jobholder has responsibility with a direct reporting line to the jobholder. Direct reporting line refers to the fact that the relevant employees are not supervised/do not report to the jobholder via any other person on the establishment. This was elucidated under question 2.1.1.*  
*(c) A NO response would indicate that the jobholder is not required to manage/supervise employees directly. Questions 2.1.3 and 2.1.4 can therefore be ignored. The next applicable question would be 2.1.5 that deals with indirect management of employees.*

**2.1.3 Please specify the types and numbers of funded posts DIRECTLY managed?**

*(a) This question requires that the directly managed/supervised posts be counted and categorized. For this purpose it is important to note the following:*  
*(i) Part-time personnel should be counted as full-time employees.*  
*(ii) Temporary and seasonal workers should be indicated under question 2.1.9.*  
*(iii) The regular/long term requirements are reflected and therefore posts that are not funded should not be reflected.*  
*(iv) The nature of work performed by the employees should determine the category of work and not the environment in which the work is done, the post designation or the existing grade. When a job falls*

Select Tracking Jobs    Next    **Finalizing Form**    **Printed Page**

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- 6.3 In many instances the first question will require a Yes/No response. In this instance the question relates to the jobs responsibility for managing human resources. .

Question 2.1.1 asks, 'Is the jobholder required to manage (plan, organise, direct ad control etc.) human resources?

By clicking the drop-down arrow on the right-hand side, you can select Yes (default answer is already set to No)




The screenshot shows a web interface for a job analysis system. At the top, it says 'Example Job / ID 38228'. Below this is a navigation bar with a dropdown menu. The main content area is titled '2 Responsibility' and '2.1 Human Resources'. A question is displayed: '2.1.1 Is the jobholder required to manage (plan, organise, direct and control etc) human resources?'. The question text is in a box with a help icon (question mark) and a tracking icon (diamond). Below the question, there are two radio buttons: 'Yes' and 'No'. The 'No' button is selected. A speech bubble icon is visible in the bottom right corner of the question area.

- 6.4 If you click 'Yes', then the remaining questions in the section will be available for you to enter a response.

- 6.5 There is a series of questions related to this sub-element that include questions on:

- **Managing staff directly** - with the opportunity to indicate the type of staff managed.
- **Indicate the nature of the jobholder's responsibility over employees.**
- **Managing staff indirectly** - with the opportunity to indicate the number of employees indirectly managed.
- **Manage other staff** - e.g. contractors and indicate how frequently this is required.

- 6.6 There are various features in the system to assist the Job Analyst which are indicted by the following symbols.

	<b>System Help Text</b> – detailed information from the DPSA Interpretation Guide that explains the requirements of the job under this element or sub-element. This information should be used to determine if the option within the question should be selected based on the evidence gathered about the job. The Help Text can be toggled on or off by clicking on this symbol.
	<b>Tracking</b> – clicking on this symbol will show you how any job you are tracking against was considered against this question.
	<b>Speech Bubble</b> - allows you to record any notes as to why an option has been selected. These notes can also be included in reports.

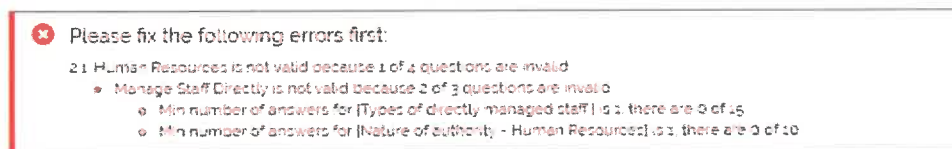
6.7 The system will also ensure that wherever a response is required, that this is completed.

For example, we have said 'Yes in response to Question 2.1.1 as outlined in Paragraph 5.21. We have also said that the job holder manages staff directly in response to Question 2.1.2. The system then requires further information about the type and number of staff managed before you can proceed to the next screen using the 'Next' button at the bottom of the screen.



The system will create a warning if this information is not completed and give further options as to how to proceed.

## 2.1 Human Resources



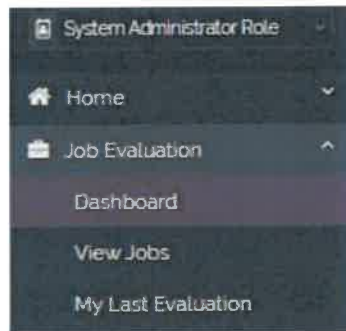
6.8 Although the system will generate the above warning message, you have options as to how to proceed. You can:

- **Ignore Errors for now** – in selecting this option, once you reach the end of the questionnaire, the job will not be evaluated as not all questions have been completed. You are then able to go back to the job later and complete the questions that have not been completed.
- **Finish and Save** – You can save the evaluation to the point that you have been able to answer the required question. You are then able to go back to the job later and complete the questions that have not been completed.

6.9 To complete the evaluation, you must complete the full questionnaire.

## 7. Other Options – Job Evaluation Tab

- 7.1 In Section 5 we introduced the Job Evaluation Dashboard and then looked at using the System Questionnaire to complete a 'New Evaluation'.
- 7.2 If we now go back to the Job Evaluation tab as shown below, there are two other options in addition to the Dashboard. These are:
- View Jobs
  - My Last Evaluation



### My Last Evaluation

- 7.3 Clicking on 'My Last Evaluation' will take you back to the last job that you were evaluating. The following screen will be shown:

geoff.pounce@utah.gov

System Administrator Role

Home

Job Evaluation

Dashboard

View Jobs

My Last Evaluation

Job Details

Configuration

Example Job / ID 38228

Edit Job

View Job

Unlink

Reports

Compare Jobs

This job is not valid because 13 of 45 pages have invalid responses.

Not Evaluated

Evaluation Method

Questionnaire Evaluated

Completed Job

Fields

Job ID

ID: 38228

Job Title

Example Job

Occupational Category

Component

Current Grade (Salary Range, e.g. 1 - 16)

Job Weight - Panel Recommendation

Navigation

Search

Job Information

- Job Information and Job Details

Job Evaluation

- Responsibility
  - Human Resources
  - Financial Resources
  - Equipment
  - Stores & Livestock
  - Land & Buildings
  - Autonomy
  - Advisory Responsibility
  - Impact
  - Risk Of Errors
- Thinking Demands
  - Understanding Job Info
  - Problem Solving
  - Planning
  - Authority
  - Creativity
- Knowledge
  - Breadth Of Knowledge
  - Prior Experience
  - Qualifications
  - Skills
- Communication
  - Range Of Contacts
  - Content Of Communication
  - Verbal Communication
  - Written Communications
- Environment
  - Physical Environment
  - Physical Demands
  - Hazardous Conditions

7.4 There are a range of options available. These include:

- **Edit Job** – the option allows you to amend Section 1, Job Information
- **Copy** – make a copy of the evaluation.
- **Delete** – delete the role from the system.
- **Reports** – create individual job reports.
- **Compare jobs** – compare the factor levels for this job compared to another.
- **Evaluate Job** – in this instance, complete the evaluation, but also undertake a further review if required.

The following section provides further information on the key options listed above.

### Evaluate Job

7.5 The screen gives you the ability to either complete or review the evaluation from the start of the questionnaire by clicking on the 'Evaluate Job' tab.

Example Job / ID 38228

Edit Job Copy Delete Reports Compare Jobs

This job is not valid because 30 of 25 pages have invalid answers

Not Evaluated

Evaluation Method Questionnaire Evaluated

Evaluate Job

Fields

Job ID	ID 38228
Job Title	Example Job

By clicking on the 'Evaluate Job' tab you will be taken back to the start of the questionnaire.

7.6 You will also see a list of all the factors and sub-elements in the system questionnaire. By clicking on a specific item, e.g., 'Thinking Demands', 'Planning' you will be taken to that part of the system questionnaire so you can review and amend your previous responses.

## Navigation

- 🔍 Search
- 📁 Job Information
  - ✓ 1 Interview and Job Details
- 📁 Job Evaluation
  - 📁 2 Responsibility
    - 2.1 Human Resources
    - ✓ 2.1 Financial Resources
    - ✓ 2.1 Equipment
    - ✓ 2.1 Stores & Livestock
    - ✓ 2.1 Land & Buildings
    - 2.2 Autonomy
    - ✓ 2.3 Advisory Responsibility
    - 2.4 Impact
    - ✓ 2.5 Risk Of Errors
  - 📁 3 Thinking Demands
    - 3.1 Understanding Job Info
    - 3.2 Problem Solving
    - ✓ 3.3 Planning
    - 3.4 Authority
    - ✓ 3.5 Creativity
  - 📁 4 Knowledge
    - 4.1 Breadth Of Knowledge
    - ✓ 4.2 Prior Experience
    - ✓ 4.3 Qualifications
    - ✓ 4.4 Skills
  - 📁 5 Communication
    - 5.1 Range Of Contacts
    - 5.2 Content Of Communication
    - 5.3 Verbal Communication
    - ✓ 5.4 Written Communications
  - 📁 6 Environment
    - ✓ 6.1 Physical Environment
    - ✓ 6.2 Physical Demands
    - ✓ 6.3 Hazardous Conditions

## Compare Jobs

- 7.7 This function allows you to compare the role you are evaluating to another job or group of jobs (using a filter). The comparison will be based on the responses given factor by factor.

When you click on 'Compare Jobs' you will be taken to the screen below.

Select the factor that you want to compare using the drop-down menu under 'Select a Factor'. This will list the five factors within the scheme.

Type in the Job Title of the role you want to compare against in the box next to 'Add a Job'.

OR

you can create a filter to compare against a group of jobs that match your specified filter criteria. Filters are discussed in Section 8.



## Job Comparison

Select a Factor

2. Responsibility

Select Jobs matching a filter

No Selected Item

Add a Job

After Job is compared

Large Question column

	Example Job	Admin Clerk
2. Responsibility		
2.1. Human Resources		
Manage staff?	Y	N
Manage Staff Directly?	Y	N
Manage Staff Directly		
Basic manual		
Semi-skilled manual	LD	
Skilled manual		
Clerical		
Administrative		
Services Act Personnel		
Technical		
Scientific		

- 7.8 The above screen shows all the questions for your job and those you are comparing it against. You will see the responses given to all questions for each job.

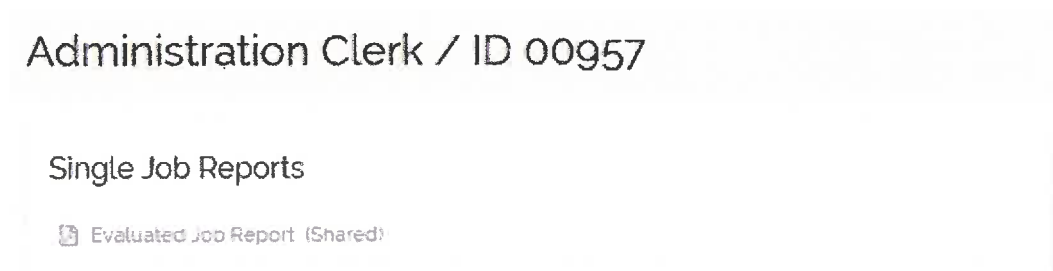
There is the ability to download these reports into Excel by pressing 'Download' at the bottom of the screen.

## Reports

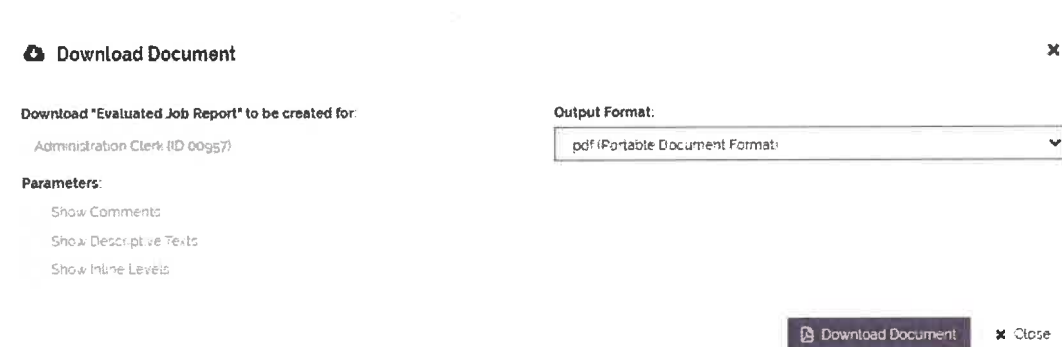
- 7.9 In this section you can create an individual Job Report and specify the level of information that you want to include in the report. The job must have been completed to create a valid report. You can also create 'Compare Scores' reports from this section.

Click on 'Reports' and you will be taken to the following screen.

The 'Compare Scores' option will appear on the right-hand side of the screen.



Click on 'Evaluated Jobs Report' which will take you to the following screen where you can specify what information you wish to include in the report. Tick the boxes relating to the information you wish to include.



You can include the following information in the report:

**Show Comments** – this will include any information you have entered into the Comments section against each question.

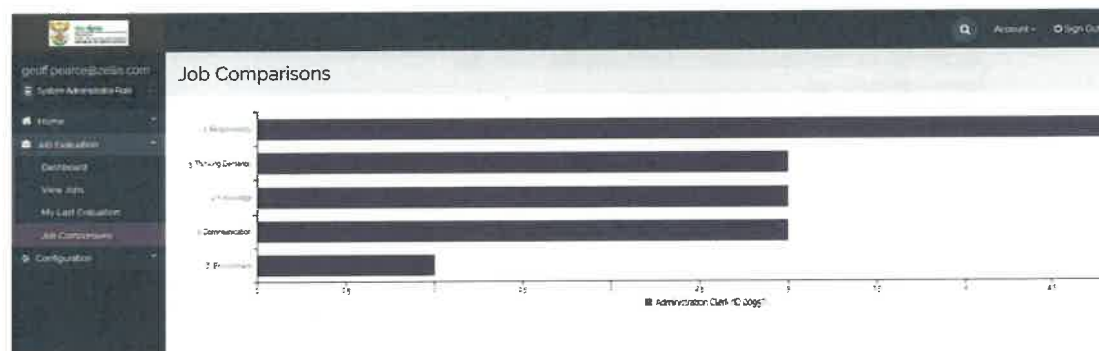
**Show Descriptive Text** – this will include the system Help Text.

**Show Inline Levels** – this will show the factor evaluated levels.

Select the format that you wish the document to be produced in (RTF or PDF) and then click 'Download' to create a copy of the job report.

- 7.10 The 'Compare Scores' report allows you to produce a report showing the factor levels for the job you evaluated against another role.

Click on 'Compare Scores' and the following screen will be displayed.



The graph shows the factor level awarded for your job.

By clicking, 'Add a Job' on the right-hand side of the screen, you can compare your job to another evaluated job in the database. When you click on 'Add a Job' you will be taken to the following screen where you can search for jobs to compare scores against.

**Q Search for a Job** ✕

Enter known terms in the box below to search for a specific job

Search  Q

✕ Close

Enter your search text, e.g. 'Admin' and click on the search icon. This will then create a list of jobs that you can compare the scores of your job against as shown below.

**Q Search for a Job**

Enter known terms in the box below to search for a specific job

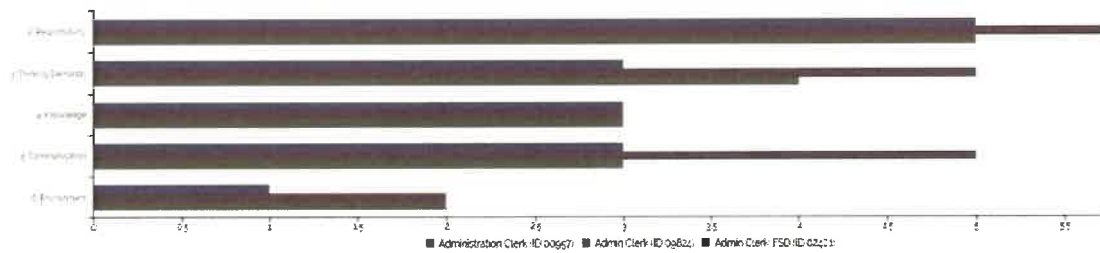
Search

Results

- Admin Clerk (ID 09824)
- Admin Clerk FSD (ID 02401)
- Admin Officer - Head of Department's Office (ID 27859)

Click on the job you wish to include in the comparison and the following screen will show. You can add additional jobs to the comparison by following the same process as described above.

#### Job Comparisons



#### View Jobs

- 7.11 The final option under the Job Evaluation tab is 'View Jobs'. This allows you to look at the overall Rank Order of jobs and other system views/reports within the system or to create new views and filters.

When you click on 'View Jobs' you will be taken to the following screen that shows the overall rank order of jobs. The report will include the job details and the factor level score, total points score and grade.

View Jobs										
Views: Rank Order										Include Comments
Filter: No Filter										
Preset: No Presets										
Job ID	Job Title	RP	TD	KN	CM	EN	Score	Grade		

By clicking on the Job ID, you can 'View Job' or 'Compare' against another job as described previously.

The Rank Order or any system view that you are looking at can also be downloaded to Excel.

- 7.12 From this screen you can also create system views and filters to produce your own reports and review jobs that meet specific criteria set as a filter.



**View Jobs**

**Views:** Rank Order

**Filter:** No Filters

**Preset:** No Presets

### Views

- 7.13 A 'View' is a report that allows you to create reports that can be downloaded and is accessed by clicking on the drop-down arrow. You will then have the following options:

- Rank Order – select an existing 'View' from those listed.
- Create New View – create your own system view/report.
- Manage Views – manage existing views including making Views available to other Users.



**View Jobs**

**Views:** Rank Order

**Filter:** Rank Order Shared

**Preset:**

**Actions**

- + Create New View
- Manage Views

**Job ID**

ID: 26712

## Filters

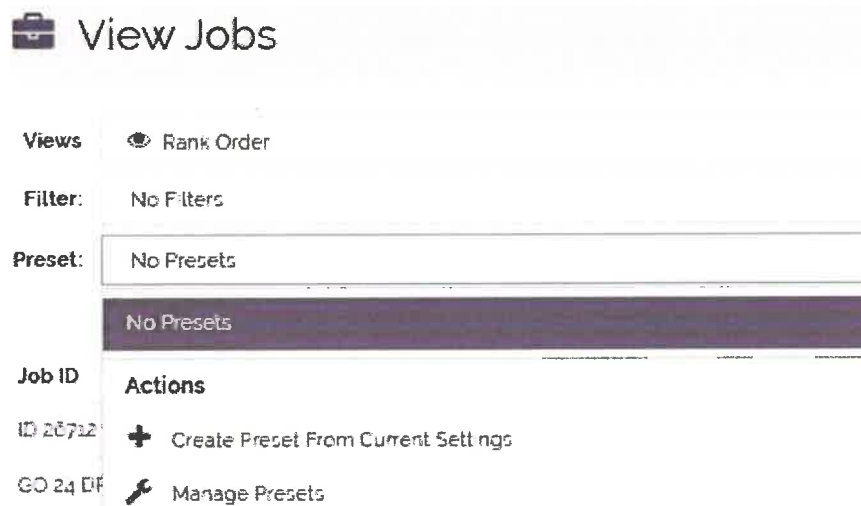
7.14 This allows you to apply an existing filter to the System View or to create new ones.



The screenshot shows the 'View Jobs' interface with a sidebar on the left. The sidebar has a 'Views' section with a 'Rank Order' option. Below it is a 'Filter:' dropdown menu set to 'No Filters'. Underneath is a 'Preset:' dropdown menu, also set to 'No Filters'. At the bottom of the sidebar is an 'Actions' section with two options: '+ Create New Filter' and 'Manage Filters' (indicated by a wrench icon). The main content area is titled 'View Jobs' and is currently empty.

## Presets

7.15 A 'Preset' is a combination of a System View and Filter created from those available in the system.



The screenshot shows the 'View Jobs' interface with a sidebar on the left. The sidebar has a 'Views' section with a 'Rank Order' option. Below it is a 'Filter:' dropdown menu set to 'No Filters'. Underneath is a 'Preset:' dropdown menu, also set to 'No Presets'. At the bottom of the sidebar is an 'Actions' section with two options: '+ Create Preset From Current Settings' and 'Manage Presets' (indicated by a wrench icon). The main content area is titled 'View Jobs' and is currently empty.

7.16 Section 8 outlines how to use the System View and Filter options listed above.

## 8. Reporting


### System Views

- 8.1 To create a new or use a different System View, click on 'Views' which will take you to the following screen, any existing views will be listed together with the option to 'Create a New View'.

Click on 'Create New View'

The screen will contain three sections:

- Add an element.
- Columns.
- Group By.



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System Administrator Role

Home

Job Evaluation

Dashboard

View Jobs

My Last Evaluation

Add Job View

Configuration

## Add Job View

Name

Add An Element

Search

Results

Job Information

Job Evaluation

Columns

Job ID

Job Title

Sorted by Job ID

Group By

ascending

No group is applied (up to 3 allowed)



## Add an Element


8.2 This section allows you to select the data fields that you wish to include in the report. Fields are grouped into three areas:

- Results.
- Job Information.
- Job Evaluation.

The full range of fields available in each section is accessed by clicking on the '+' sign next to the group name as shown below.



All reports will include Job ID and Job Title by default.

Job ID must be included in the report, but you will see a  symbol against fields indicating that you can delete them from the list of fields included in the report.

To add a field to the report/view, simply click in the field name and it will be added to the Column list.



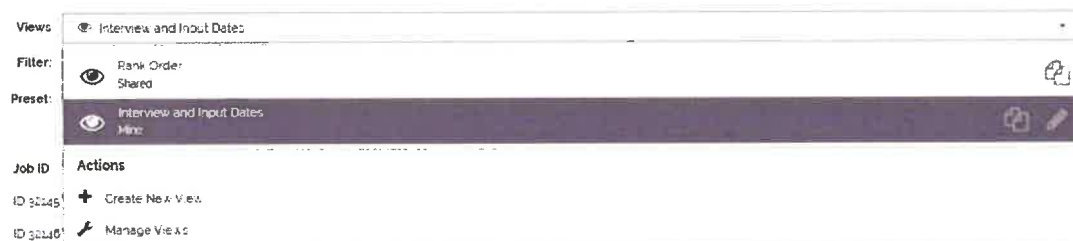
You can determine the sort order of your report by selecting which field you want to sort by and whether that is in ascending or descending order.

Give the Report/View a Name by typing this is the Name box at the top of the screen.

To keep the report for future use, click 'Save and Use'. You can also click 'Use' and the report will only be available during this session, unless you decide to keep it and then click, 'Save and Use'.

The report will now be displayed and will also appear in the list of Views that you can access.

#### View Jobs



Whenever you click on 'Views' you will see a list of all reports available to you.

Some will show as 'Shared' in which they case they are available to everyone, or 'Mine' when they will only be available to you.

You can edit a View by selecting the pencil icon against the View name in the drop-down list.

## Filters

- 8.3 A filter allows you to create criteria that a job must pass to be included in the filter group.
- 8.4 You may wish to create a filter to look at jobs within a specific department, or a certain grade, or that have been evaluated at a certain level against a factor.
- 8.5 Filters work in a similar way to creating Views.

Click on the Filter Drop-down and you will see a list of available filters (if any have been created).

To create a new filter, click on 'Create New Filter' and you will see the following screen:

The screenshot shows a web interface for creating a job filter. At the top, there's a header 'Add Job Filter'. Below this, there's a section with two main areas. On the left, under the heading 'Available options', there's a search bar with a magnifying glass icon and the text 'Search'. Below the search bar, there are three items listed: 'Results' with a plus icon, 'Job Information' with a plus icon, and 'Job Evaluation' with a plus icon. On the right, under the heading 'Selected options', there's a message that says 'No options chosen yet'.

The fields that are available to create a filter can be accessed by clicking on the '+' sign.

If you want to create a group of all jobs that have been evaluated at Grades 1 to 3, then:

Click on 'Results'.

Click on 'Grade'.

You will now see a screen like the one below.

## Add Job Filter

**Available options**

Search

Results

- Score
- Grade
- Last Modified By
- Last Modified
- Last Modified Organisation
- Evaluation Method
- Slotted Against
- Profile-model
- Profile-model Active
- Profile-model Archive Date
- Evaluation Match

**Selected options**

1. Grade

Is Equal To

Default Grade

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- ~

Underneath the field 'Grade' in Selected Options, you will see a 'Test'. In this case the options are 'Is Equal To', by clicking the drop-down arrow, you will see other 'Tests', e.g., 'Not Equal To'.

To select all jobs that have been graded between Grade 1 and 3, then use the 'CTRL' key and highlight the grades you wish to include as shown below.

**Selected options**

1. Grade

Is Equal To

Default Grade

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- ~

**Summary**

Grade = 1 , 2 , 3

You will also notice that a Summary if your filter is being created.

You can add other fields to the filter such as an individual factor and combine the different data fields used to create your filter.

For example, if I want to identify all jobs that have been evaluated at Grades 1 to 3 and have a Responsibility Level of 1 to 3, then you need to combine data fields together as shown below.

## Selected options

How would you like to combine these conditions?

AND	NAND	OR	NOR
-----	------	----	-----



1 Grade



Is Equal To



Default Grade

1
2
3
4
5
6
7
-



2 2. Responsibility



Is Equal To



1
2
3
4

## Summary

Grade = 1 , 2 , 3 AND

2. Responsibility = 1 , 2 , 3

## Presets

- 8.6 A 'Preset' is a combination of an existing 'View' and 'Filter' which is created by clicking the arrow against the Preset drop-down. You can then create a Preset by clicking 'Create Preset from Current Settings'
- 8.7 The Preset will be created based on the View and Filter that are currently selected. You will see this displayed as shown below.

### Enter Preset Name



Enter a descriptive name for the new Preset so that you can identify it later.

Rank Order - Grade and Responsibility Factor

✓ OK

✗ Cancel

