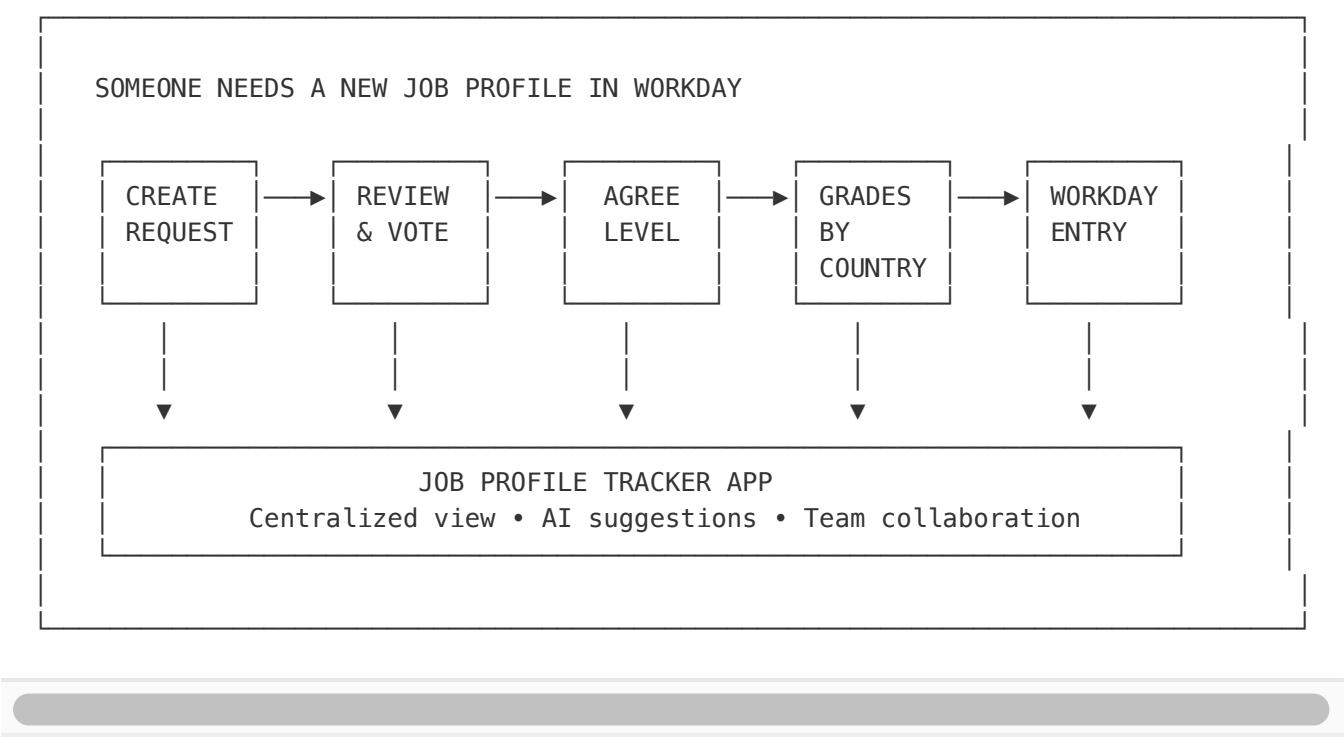# Job Profile Tracker — Workflow Overview

This document explains how the Job Profile Tracker works, from request creation to Workday entry.

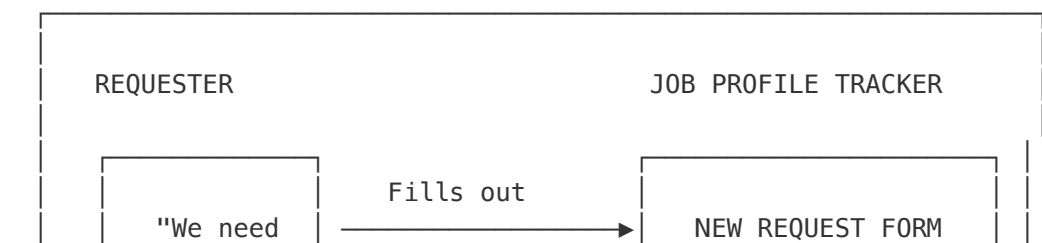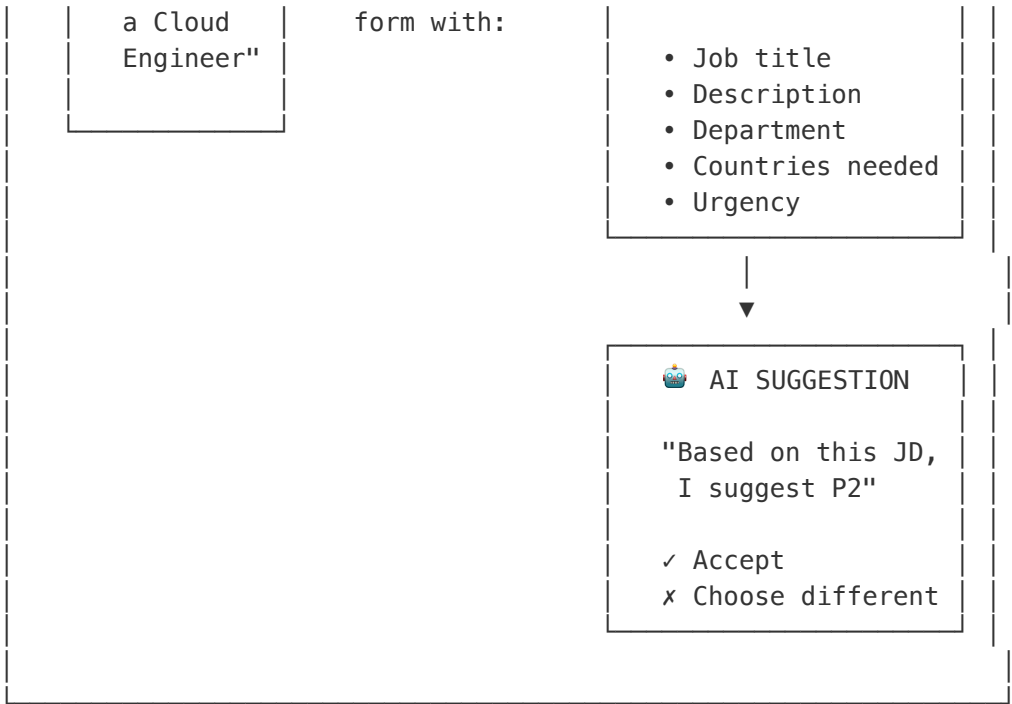## The Big Picture

```
┌──────────────────────────────────────────────────────────────────────────┐
│                                                                            │
│   SOMEONE NEEDS A NEW JOB PROFILE IN WORKDAY                                │
│                                                                            │
│   ┌──────────┐    ┌──────────┐    ┌──────────┐    ┌──────────┐    ┌──────────┐ │
│   │ CREATE   │ →  │ REVIEW   │ →  │ AGREE    │ →  │ GRADES   │ →  │ WORKDAY  │ │
│   │ REQUEST  │    │ & VOTE   │    │ LEVEL    │    │ BY       │    │ ENTRY    │ │
│   │          │    │          │    │          │    │ COUNTRY  │    │          │ │
│   └──────────┘    └──────────┘    └──────────┘    └──────────┘    └──────────┘ │
│        │               │               │               │               │      │
│        │               │               │               │               │      │
│        ▼               ▼               ▼               ▼               ▼      │
│   ┌────────────────────────────────────────────────────────────────┐       │
│   │                   JOB PROFILE TRACKER APP                        │       │
│   │    Centralized view • AI suggestions • Team collaboration        │       │
│   └────────────────────────────────────────────────────────────────┘       │
│                                                                            │
└──────────────────────────────────────────────────────────────────────────┘
```

Step-by-Step Process

Step 1: Create Request

Who: Any People Success team member
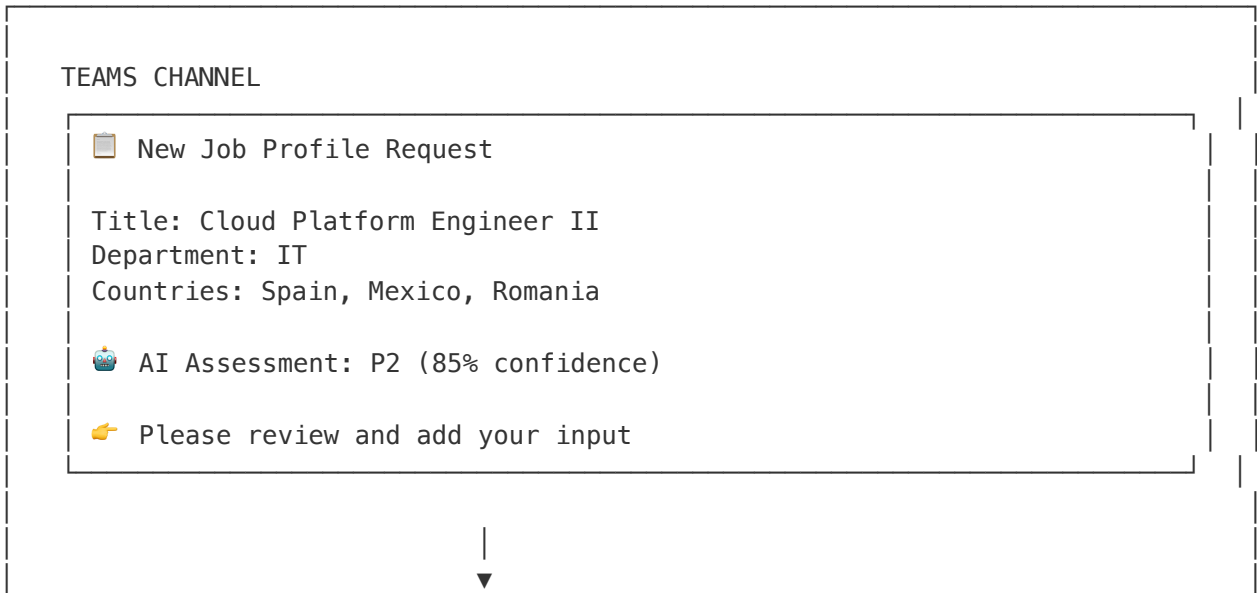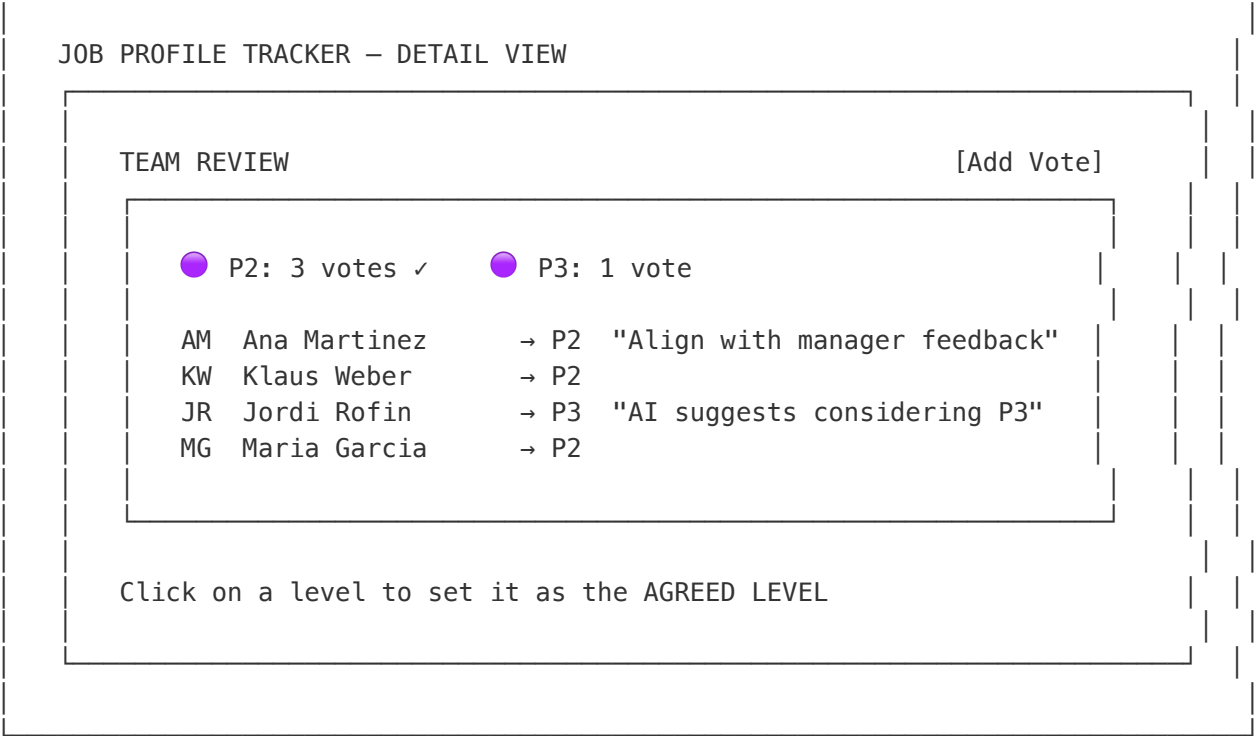**When:** A new position needs to be created or an existing one needs updating

```
┌───────────────────────────────────────────────────────────────────┐
│                                                                     │
│   REQUESTER                        JOB PROFILE TRACKER               │
│                                                                     │
│   ┌──────────┐       Fills out    ┌──────────────────┐  │          │
│   │ "We need             ─────────▶│  NEW REQUEST FORM │  │          │
```

```
|    a Cloud     |      form with:      |                            | |
|    Engineer"   |                      |  • Job title               | |
|                |                      |  • Description             | |
|                |                      |  • Department              | |
|                |                      |  • Countries needed        | |
|                |                      |  • Urgency                 | |
|                |                      |                            | |
|                |                               |                     |
|                |                               ▼                     |
|                |               |                            |        |
|                |               |  🤖 AI SUGGESTION          |        |
|                |               |                            |        |
|                |               |  "Based on this JD,        |        |
|                |               |   I suggest P2"            |        |
|                |               |                            |        |
|                |               |  ✓ Accept                  |        |
|                |               |  ✗ Choose different        |        |
|                |               |                            |        |
```

What happens automatically:

- Request is saved to SharePoint
- Teams notification is posted to the channel
- Due date is set (10 business days)
- AI analyzes the job description and suggests a management level

---

Step 2: Team Review & Voting

Who: All People Success team members
When: After request is created

```
|                                                                      |
|   TEAMS CHANNEL                                                      |
|                                                                      |
|   | 📋  New Job Profile Request                            | |
|   |                                                        | |
|   | Title: Cloud Platform Engineer II                      | |
|   | Department: IT                                         | |
|   | Countries: Spain, Mexico, Romania                      | |
|   |                                                        | |
|   | 🤖  AI Assessment: P2 (85% confidence)                 | |
|   |                                                        | |
|   | 👉 Please review and add your input                    | |
|   |                                                        | |
|                                |                                    |
|                                ▼                                    |
```
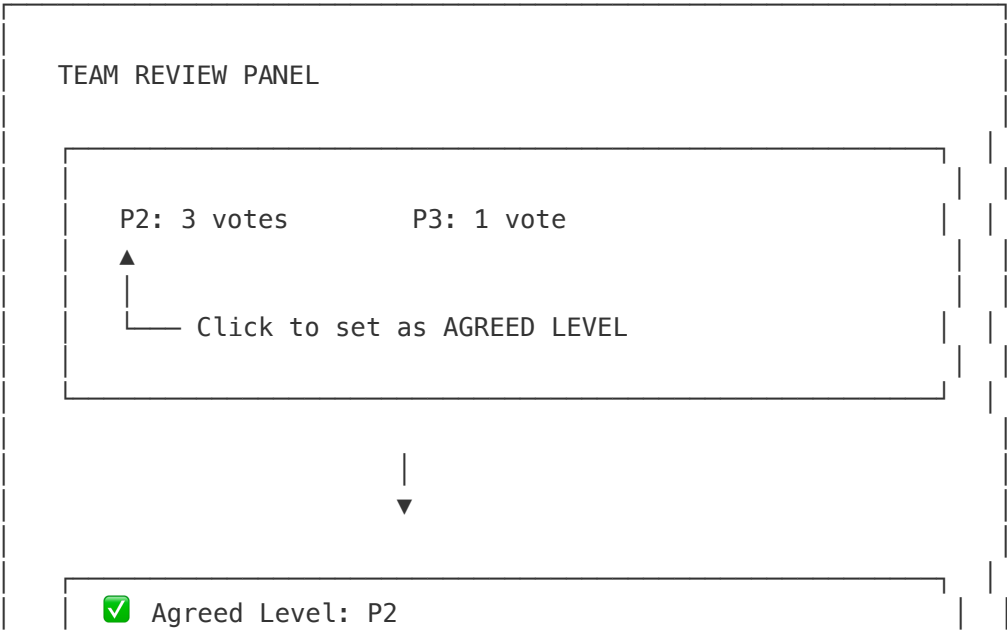
```
JOB PROFILE TRACKER — DETAIL VIEW

    TEAM REVIEW                                    [Add Vote]

        🟣 P2: 3 votes ✓     🟣 P3: 1 vote

        AM  Ana Martinez      → P2  "Align with manager feedback"
        KW  Klaus Weber       → P2
        JR  Jordi Rofin       → P3  "AI suggests considering P3"
        MG  Maria Garcia      → P2


    Click on a level to set it as the AGREED LEVEL
```

What team members can do:

- **Vote** for the management level they think is appropriate
- **Comment** to discuss with the team
- **See AI reasoning** (why this level, why not higher/lower)

Step 3: Agree on Management Level

Who: Team lead or consensus decision

When: After sufficient votes/discussion

```
    TEAM REVIEW PANEL

        P2: 3 votes        P3: 1 vote
        ▲
        └── Click to set as AGREED LEVEL



                    │
                    ▼

    ✅ Agreed Level: P2
```

```
                                                      |  |
|    Status automatically changes to: "Grades Pending"  |  |
|                                                    |  |
|                                                       |
|                                                       |
```

Step 4: Add Grade Ranges by Country

Who: Country representatives

When: After management level is agreed

```
|                                                           |
|  GRADE RANGES BY COUNTRY                        [Add]     |
|                                                           |
|  |                                                    |   |
|  |   Countries needed: Spain, Mexico, Romania         |   |
|  |   ⚠ 1 pending                                      |   |
|  |                                                    |   |
|  |   |  🇪🇸  Spain      Grade 5 – 7    Ana Martinez   Jan 28, 2026  |  |  |
|  |   |  🇲🇽  Mexico     Grade 4 – 6    Carlos Lopez   Jan 29, 2026  |  |  |
|  |   |  🇷🇴  Romania    ⏳ Pending...                   |  |  |
|  |                                                    |   |
|  |                                                    |   |
|                                                           |
|  When all countries have grades → Status changes to "Ready for Workday"  |
|                                                           |
```

Each country representative:

1. Opens the Job Profile in the app
2. Clicks "Add" in the Grade Ranges section
3. Selects their country
4. Enters min and max grade for their market

Step 5: Workday Entry

Who: Assigned team member (auto-assigned)

When: When status is "Ready for Workday"

```
STATUS: Ready for Workday

    AUTOMATIC NOTIFICATION TO ASSIGNEE

    📌 You have a new assignment

    Job Profile: Cloud Platform Engineer II
    Agreed level: P2
    Countries: Spain (5–7), Mexico (4–6), Romania (5–6)

    Please create in Workday and update status.


                    |
                    ▼


ASSIGNEE ACTIONS:

1. Create Job Profile in Workday
2. Enter grade ranges for each country
3. Update status to "Completed" in the app
4. Add Workday Job Code to the request
```

Automatic Reminders & Escalations

The system sends automatic notifications to keep things moving:

```
DAILY AUTOMATED CHECKS (9:00 AM)

    CHECK 1: Management Level Pending > 3 days

        ⏰ Reminder: "AI Data Specialist" needs a management level
           Pending since: Jan 25, 2026 (5 days ago)
           → Sent to: #job-profiles channel


    CHECK 2: Grade Ranges Pending > 3 days

        ⏰ Reminder: "Cloud Engineer" needs Romania grade range
           Missing countries: Romania
           → Sent to: #job-profiles channel
```

```
DAILY ESCALATION CHECK (10:00 AM)

    CHECK: Requests past due date

        ESCALATION: "Senior Architect" is overdue
        Due date: Jan 28, 2026 (2 days overdue)
        Current status: Grades Pending
        Assigned to: Maria Garcia
        → Sent to: #managers channel
```

Status Flow Summary

```
┌──────────┐     ┌──────────────┐     ┌──────────┐     ┌──────────┐
│          │     │              │     │          │     │          │
│   NEW    │ ──► │ AWAITING MGMT│ ──► │  UNDER   │ ──► │  GRADES  │ ─
│          │     │    LEVEL     │     │  REVIEW  │     │ PENDING  │
│          │     │              │     │          │     │          │
└──────────┘     └──────────────┘     └──────────┘     └──────────┘

   When:             When:               When:             When:
 Request is       No mgmt level       Has proposed     Level agreed,
  created         proposed yet         level, under    waiting for
                                       team review     country grades
```
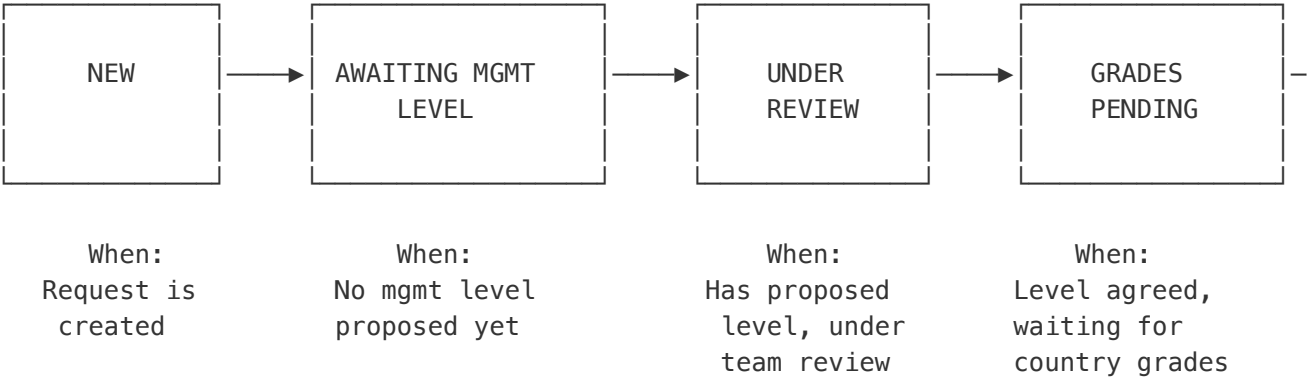
Key Benefits

Before	After
❌ No clear ownership	✅ Auto-assignment when ready
❌ Forget to add grades	✅ Automatic reminders
❌ Unclear mgmt level process	✅ Voting system with AI suggestion
❌ Manual Teams posts	✅ Automatic notifications
❌ No visibility on pending work	✅ Dashboard with filters and status
❌ Escalations missed	✅ Daily escalation to managers

System Components

```
┌─────────────────────────────────────────────────────────────────────┐
│                                                                       │
│  ┌──────────────────┐   ┌──────────────────┐   ┌──────────────────┐  │
│  │                  │   │                  │   │                  │  │
│  │  JOB PROFILE     │◄─►│  SHAREPOINT      │◄─►│  POWER AUTOMATE  │  │
│  │  TRACKER APP     │   │  LISTS           │   │  FLOWS           │  │
│  │                  │   │                  │   │                  │  │
│  │  • Create        │   │  • Store data    │   │  • Reminders     │  │
│  │  • View          │   │  • Track history │   │  • Notifications │  │
│  │  • Vote          │   │                  │   │  • Escalations   │  │
│  │  • Comment       │   │                  │   │  • Assignments   │  │
│  │  • Add grades    │   │                  │   │                  │  │
│  │                  │   │                  │   │                  │  │
│  └──────────────────┘   └──────────────────┘   └──────────────────┘  │
│           │                                              │            │
│           │                                              │            │
│           ▼                                              ▼            │
│  ┌──────────────────┐                          ┌──────────────────┐  │
│  │                  │                          │                  │  │
│  │  OPENAI API      │                          │  MICROSOFT       │  │
│  │                  │                          │  TEAMS           │  │
│  │  • AI leveling   │                          │                  │  │
│  │  • JD analysis   │                          │  • Notifications │  │
│  │  • Suggestions   │                          │  • Discussion    │  │
│  │                  │                          │                  │  │
│  └──────────────────┘                          └──────────────────┘  │
│                                                                       │
└─────────────────────────────────────────────────────────────────────┘
```
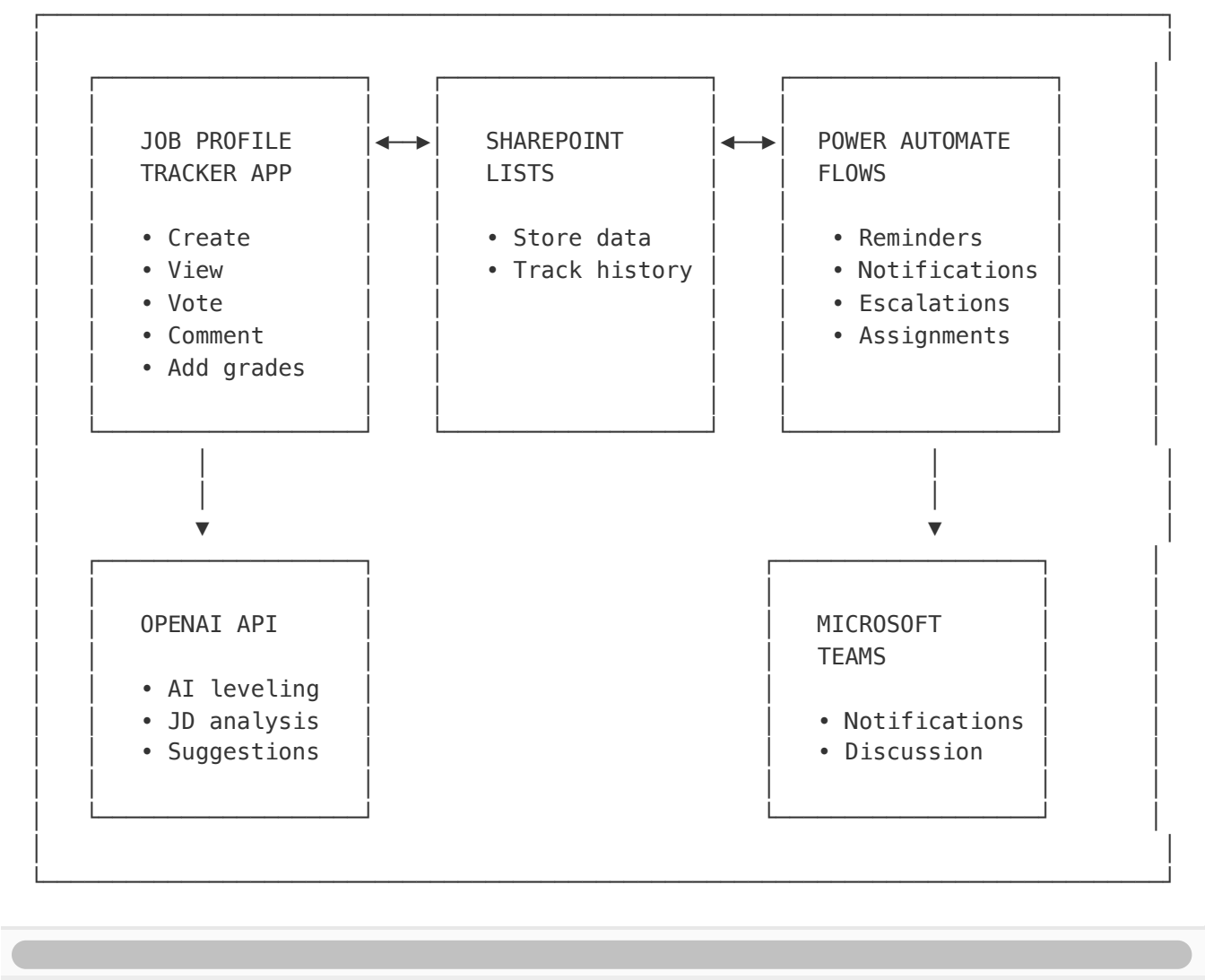
Questions?

Contact the People Success team or refer to the technical documentation in the `docs/` folder.