CREATE POSITION

Quick Steps

To create a new position, take the following steps in Aurora:

1. Select Positions > Create New Position from the top menu.
2. Fill out the Create New Position form, including:
   a. Job Information
   b. Department Information
   c. FTE and Head Count
   d. Reports To
   e. Position Budgeting
   f. Position Description
3. Enter Position Tracking Notes describing the rationale for the new position
4. Attach associated documents (e.g., PMF, CRF), as required
5. Enter an Action Comment, if desired
6. Submit

The remainder of this guide contains detailed step-by-step instructions and FAS policy guidance.
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AURORA – USER GUIDE

Process Initiation

To create a new position:

1. In your favorite browser log in to Aurora (https://aurora.fas.harvard.edu)
2. Hover over the Positions tab to view the full sub-menu
3. Select Create New Position option and the position form will open.

Create New Position

The Create New Position form is divided into several sections. We will review each of the sections below.

Action Information

The Action Information section displays basic information about the type of action you are creating.

1. Position Number and Action Number will be generated by PeopleSoft and populated once the action is saved or submitted.
2. Action Reason will be populated as New.
3. Enter the Effective Date (the start date for the position).

NOTE: Ensure the Effective Date you enter is equal or prior to the date on which the first appointment associated with the position will start. You will not be able to hire into the position with an appointment start date prior to the position start date.
STATUS

1. **Effective Status** is display only and will be shown as Active for a new position.
2. **Position Status** defaults to **Not on Hold**. Modify this to On Hold if the new position is not approved for posting immediately and will be filled at a later date.
   a. Note: Positions that are On Hold will not be available to post in Harvard Careers.

JOB INFORMATION

1. Enter the **Job Code** or look it up using the icon displayed next to the field.
   1. **Salary Grade, Employee Class, FLSA Status** and **Union** fields are populated based on the Job Code selected.
2. **Union** may be edited, if needed. This is rare and should only be done in consultation with your HR Consultant.
3. Enter the **Business Title**. This title will be used for any job associated with the position.
4. Enter the **Position Title**. This is a short business title (max 30 characters) that will display in Harvard Careers postings, PeopleSoft, HUBS and some QlikView reports.
5. Select a value for the **Critical Position** field from the dropdown.
**DEPARTMENT INFORMATION**

1. Select an **Aurora Group** from the dropdown.
   a. The dropdown will populate based on the groups for which you have permission to initiate actions.
2. Select a **PS Department** from the dropdown.
   a. The dropdown will include all PeopleSoft departments associated with the Aurora Group selected above.
3. Review the **Harvard Location**, which defaults based on PS Department. If necessary, update the location to reflect the office location associated with the position. Search for a location using the icon next to the field.

**FTE AND HEAD COUNT**

1. Review the **Salary Admin Plan** populated from the Job Code and modify as needed.
2. Review the **Standard Hours** populated from the Salary Admin Plan and modify as needed.
3. **FTE** is a display-only field calculated based on the Salary Admin Plan and Standard Hours entered above. The FTE value recalculates if Salary Admin Plan or Standard Hours are modified.
4. **Max Head Count** defaults to 1. This value should only be modified in consultation with your HR Consultant and Recruiter. The expectation in the FAS is that all positions will be single headcount except in very specific circumstances.
REPORTS TO

There are two reporting relationships available on a position:
1. Reports To is the direct supervisor
2. Reports to Dotted-Line is a secondary supervisor/leader that provides additional oversight and guidance to the employee in the execution of his/her work. The dotted-line supervisor has the authority to provide some level of influence and leadership over the employee. For example, the Department Administrator in an academic department may have the Department Chair as their primary supervisor and the Administrative Dean of their Division as a dotted-line supervisor.

To search for a Reports To or Dotted-Line Report position use the icon displayed next to the desired field.

The lookup allows you to search for positions using a variety of fields including Department, Business Title, Incumbent’s Empl ID, Last or First Name or the Position Number. Search for a position using the desired criteria and select the position from the results using the Select button.

NOTE: The Reports To section allows you to capture reporting relationships between PeopleSoft positions only. If the supervisor for a position is not in an appointment associated with a position, you will not be able to indicate the reporting relationship on the position. For example, as of October 2019 only staff appointments will have positions. If the position you are creating will report to a faculty member, you will not be able to indicate that in the Reports To section of the position as the faculty member will not have a position. You will still be able to list the faculty member as the Supervisor on the appointment when you hire an employee into the position.
POSITION BUDGETING

The **Position Budgeting** section allows users to capture information related to the funding of the position such as funding source, term, and seasonality. Please be sure to complete as many fields as appropriate so they accurately reflect the funding source, term, budgeted salary, etc. as approved through the PMF process. Descriptions of each field can be found below.

- **Initial Funding Type**: Indicates the initial funding source for the position.
- **Budgeted Position**: Indicates whether this position was included in the budget process.
- **Budgeted Start Date**: Budgeted start date for position. Used for Budget reporting purposes.
- **Budgeted End Date**: Budgeted end date for position. Used for Budget reporting purposes.
- **Budgeted Salary**: Placeholder salary amount for vacant or pending positions. Does not transfer to job or impact any process. It is informational only to be able to project salary expenses on vacant positions (for example, may be used by the PI dashboard)
- **HUBS Position**: Placeholder position used in budgeting before actual position number is created in PeopleSoft. Departments can find this number in HUBS on Webform 104 (WFB104 Review & Modify Salary and FTE by Tub-Org) or the Employee Data Audit Report (FRBE122 Employee_Data_Audit). 80 characters maximum.
- **Funded Position**: Used for unpaid positions to identify employees who are in paid positions in another department (typically cross-tub) from which salary is paid.
- **Position Replaced**: Used to indicate that the new position is replacing an existing position. Does not inactivate old position. This must be done in a separate Edit Position transaction.
- **Term Position**: Indicates whether a position is permanent or for a limited term. If checked, a Term Duration must also be specified. Note: This is informational only and will not impact the job or other processing.
- **Term Duration (Months)**: The anticipated duration of the position in months. Only required if Term Position is selected.
- **Seasonal**: Indicates that the position is seasonal. If checked, a Season Duration must also be specified. Note: This is informational only and will not impact the job or other processing.
- **Season Duration (Weeks)**: The number of weeks per year that the seasonal position is active. Only required if Seasonal Position is selected.
POSITION DESCRIPTION

The Position Description section displays nine fields corresponding to the Job Framework Program job description fields.

1) **Job Summary, Job Specific Responsibilities** and **Basic Qualifications** are required fields for all positions.
2) For Job Codes that are part of the Job Framework Program, Aurora will default data in the Job Summary, Typical Core Duties and Basic Qualification fields and this data may not be edited. **Job Specific Responsibilities** must still be defined for these positions.
3) Review/enter data in as many of the other fields as desired.

POSITION TRACKING NOTES

In the Position Tracking Notes section enter a brief rationale for the new position. Include the date the position was approved through the PMF process.

ATTACH DOCUMENT

For New Position actions, if a **Classification Review Form** was completed for the position the approved form should be attached. Note that documents must be in PDF format.

1) To attach a document, select the **Attach PDF** button. This will display the **Attach Document** popup window.

2) Select the **Browse** button to locate the desired PDF file.

3) Select the **Document Type** from the list displayed and select **Upload** to upload and attach the document to the action.
Once the document is uploaded it can be viewed ▶️ or deleted ❌ by clicking the appropriate icon displayed next to the file.

**Action Comments**

Use the **Action Comments** field to capture any additional information that would be helpful for approvers reviewing the action. These notes can be modified or appended to by approvers as the action moves through the workflow approval process.

**Save As Draft or Submit the Action**

Save as Draft, Submit and Cancel buttons are displayed at the bottom of the form.

1. **Save as Draft** saves the action and creates a draft. You may then edit and submit the form at a later time.
2. **Submit** pushes the action to the next workflow stage for approval in Aurora.
3. **Cancel** removes the action. Once an action is cancelled it cannot be edited or submitted.

**Action Review Screen**

Once a form is successfully saved or submitted, the **Position Number** and **Action Number** will populate in the **Action Information** section at the top of the page.

**Action Workflow**

Once an action has been submitted, it goes through an approval workflow. Depending on your permissions, your action may either be in the **Department Approval** or **Back Office** stage after submission. The turnaround time for actions in the approval workflow depend on various factors such as how many actions are in the approver’s queue etc. More information about the Approval Workflow in Aurora can be found in the Aurora Knowledge Center at about.aurora.fas.harvard.edu.
The Workflow History section provides users with a log of the approval steps taken on an action. Users can see the Approver Name, Department, Email and Phone as well as the Date and time each approver took action and the type of action taken (Status).