EDIT POSITION

Quick Steps

To Edit a Position, take the following steps in Aurora:

1. Select **Positions > Position Search** from the top menu.
2. Search for and select the desired position from the search results to get to the Position Homepage.
3. Click the **Edit Position** button to open the **Edit Position** form.
4. In the **Action Information** section:
   1. Select an **Action Reason**.
   2. Enter the **Effective Date** for the change.
5. Modify desired fields available to edit.
6. If the position is filled, indicate whether optional changes should be pushed to incumbent(s).
7. Enter **Position Tracking Notes** to provide context for the change.
8. **Attach** supporting documents (e.g., PMF, CRF), as required.
9. Enter an **Action Comment**, if desired.
10. **Submit**

The remainder of this guide contains **detailed step-by-step instructions** and **FAS policy guidance**.

**Helpful Hint: Filled positions can be edited and changes will be pushed to incumbent(s)**

Certain data (e.g. job code, PS department, business title) is owned by the position and must be modified on the position rather than the job. Edit Position is therefore available for filled positions. Edit Position now has Action Reasons like Job Data Change. When a change is made on a position, a corresponding job row will be created in PeopleSoft on each incumbent with the Action Code of POS and an Action Reason corresponding to the position change (e.g., POS JRU for reclass upgrade, POS ORG for reorg, etc.).
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Process Initiation: Edit Position

To edit a 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 Position Search option.
4. Search for the position to edit using your preferred search criteria.
5. Select the position from the results by clicking on the Position Number. This will open the Position Page.
6. Choose the Edit Position button to initiate the action.
The Edit Position form is divided into several sections. Based on the Action Reason selected different fields are available to edit in each section. We will review each of the sections on the Edit Position form below.

**Action Information**

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

1) **Action Number** will be populated once the action is saved or submitted.

2) **Action Reason** is a dropdown showing possible reasons for the type of change you would like to make to the position.

   a. Choose the appropriate Action Reason based on the table below.

<table>
<thead>
<tr>
<th>Action Reason</th>
<th>Reason for Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reactivate (ACT)</td>
<td>Reactivate an inactive position.</td>
</tr>
<tr>
<td>Inactivate (INA)</td>
<td>Inactivate a position that is no longer needed. (The position must be open.)</td>
</tr>
<tr>
<td>General Update (UPD)</td>
<td>Update any position fields except job code and PeopleSoft department.</td>
</tr>
<tr>
<td>Reorg without Reclass (ORG)</td>
<td>Move the position from one PeopleSoft department to another department. Does not allow change to job code.</td>
</tr>
<tr>
<td>Job Reclass - Upgrade (JRU)</td>
<td>Use when moving the position to a new job code where the associated salary grade is higher than the existing job code/grade.</td>
</tr>
<tr>
<td>Job Reclass - Lateral (JRL)</td>
<td>Use when moving the position to a new job code where the associated salary grade is the same as the existing job code/grade.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Job Reclass - Downgrade (JRD)</td>
<td>Use when moving the position to a new job code where the associated salary grade is lower than the existing job code/grade.</td>
</tr>
<tr>
<td>Reorg with Reclass - Upgrade (RRU)</td>
<td>Use if the position is being moved to another unit AND the job code is being changed to one where the associated salary grade is higher than the existing job code/grade.</td>
</tr>
<tr>
<td>Reorg with Reclass - Lateral (RRL)</td>
<td>Use if the position is being moved to another unit AND the job code is being changed to one where the associated salary grade is the same as the existing job code/grade.</td>
</tr>
<tr>
<td>Reorg with Reclass - Downgrade (RRD)</td>
<td>Use if the position is being moved to another unit AND the job code is being changed to one where the associated salary grade is lower than the existing job code/grade.</td>
</tr>
<tr>
<td>Administration (ADM)</td>
<td>Generally used only by central offices for changes that are centrally controlled. For example, ADM would be used to change job codes for the Job Framework Project as these changes should not be included in the reclassification counts for a school or unit. ADM would also be used when department IDs are changed as part of a clean-up, or restructuring of a department tree, as opposed to a true reorganization. End users will only use ADM when initiating an Edit Position to correct position data that did not carry forward from a prior position row. See Helpful Hint below.</td>
</tr>
</tbody>
</table>

**Helpful Hint: Issues with future-dated position rows**

If there is a future-dated position row (e.g. you are making a change effective 9/1 and there is already a position row effective 10/1), the future dated position row will not be updated by the change you enter. If your change should apply to the future-dated position row, you will need to do a second Edit Position action after the first action has completed. The second action should have an effective date equal to the future-dated row and should use the action reason ADM. You will receive a warning in Aurora if there is a future-dated position row.
## Fields Available to Edit with Each Action Reason

<table>
<thead>
<tr>
<th>Sections</th>
<th>Fields</th>
<th>Reactivate</th>
<th>Inactivate</th>
<th>General Update</th>
<th>Reorg without Reclass</th>
<th>Job Reclass Upgrade</th>
<th>Job Reclass Lateral</th>
<th>Job Reclass Downgrade</th>
<th>Reorg w/ Reclass Upgrade</th>
<th>Reorg w/Reclass Lateral</th>
<th>Reorg w/Reclass Downgrade</th>
<th>Admin</th>
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<tr>
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<tr>
<td></td>
<td>Position Status</td>
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<tr>
<td>Job Information</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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</tr>
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<td>X</td>
<td>X</td>
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<tr>
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<td>PS Department</td>
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<tr>
<td></td>
<td>Location</td>
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<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
<td>X</td>
<td>X</td>
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<td>FTE &amp; Head Count</td>
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<td>Max Head count</td>
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<td>Reports To</td>
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<td>Dotted Line Report</td>
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<tr>
<td>Position Budgeting</td>
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</tr>
</tbody>
</table>
1) **Effective Status** is a display-only field. It displays the current Effective Status when the Edit Position form is initially loaded. Based on the Action Reason selected, the value may change on the form after submit.

   a. For Action Reason **Inactivate**, it will be shown as Inactive upon submit.
   b. For Action Reason **Reactivate**, it will be shown as Active upon submit.

2) **Position Status**

   a. Set to **Not On Hold** if the position is vacant and should be available to post in Harvard Careers.
   b. Set to **On Hold** if the position is vacant but should not be available to post in Harvard Careers immediately. This may be selected if the incumbent is on disability and the department is holding the position, the university has a hiring freeze, or the position is approved but hiring is on hold until a later date.

**JOB INFORMATION**

The Job Information section displays foundational job-related information.

1) **Job Code** may only be modified when a Reclass Action Reason is selected

   a. Enter a Job Code or search for a Job Code using the icon next to the field. The following fields default based on the Job Code and are view only:

      i. **Salary Grade**, **Employee Class** and **FLSA Status**.
   
   b. **Union** also defaults from Job Code but can be edited. Modify if needed.

2) Review and modify the following fields, if needed:

   a. **Business Title**
   b. **Position Title**
   c. **Critical Position**
DEPARTMENT INFORMATION

1) Aurora Group and PS Department may only be modified when a Reorg Action Reason is selected.
   a. Review the **Aurora Group** populated and modify as needed.
      i. The dropdown will populate based on the groups for which you have permission to initiate actions.
   b. Review the **PS Department** populated and modify as needed.
      i. The dropdown will include all PeopleSoft departments associated with the Aurora Group selected above.

2) Review **Harvard Location**, which populates 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) Review and modify the **Max Head Count** as needed.

**Note:** 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 and Reports To Dotted-Line fields are available to edit with most Action Reasons.

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. 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.**
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.

1) Review and update information in this section as needed.

### 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/modify data in as many of the fields as desired.

### Update Incumbents

This section is displayed for positions with one or more active incumbents as of the effective date of the action. The section allows users to choose whether they would like changes to optional fields (**Location Code** and **Standard Hours**) to be pushed to the incumbent’s appointment.

1) If **Yes** is selected, changes to optional fields will be pushed to incumbents.

2) If **No** is selected, changes to optional fields will not be pushed to incumbents.
NOTE: Changes to fields owned by the position (e.g., Job Code, Business Title, PeopleSoft Department) will always be pushed to incumbents’ jobs, even if No is selected in this section.

**Helpful Hint: Update Incumbent Fails**
Changes made to fields owned by position (e.g. Job Code, PS Department, Business Title) will normally push to any incumbents in the position, but in certain cases this will fail. PeopleSoft will notify the action preparer if the position change fails to update incumbent. In this case the preparer must create a Correct Action for each incumbent in Aurora to request that FAS Payroll correct the job in PeopleSoft to accurately reflect data owned by position. See the Position Update Failed user guide for more information.

**POSITION TRACKING NOTES**
In the Position Tracking Notes section enter a brief rationale for the position change. Once the action is complete these will appear on the Position Homepage with a link to the action.

**ATTACH DOCUMENT**

1) Attach a document to the action if needed.
2) 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

![Action Information Screen]

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

### Action Workflow

![Workflow Diagram]

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](http://about.aurora.fas.harvard.edu).

### Workflow History

<table>
<thead>
<tr>
<th>Workflow Stage</th>
<th>Approver Name</th>
<th>Department</th>
<th>Email</th>
<th>Phone</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Deana Reardon</td>
<td>Chemistry and Chemical Biology</td>
<td><a href="mailto:deana_reardon@harvard.edu">deana_reardon@harvard.edu</a></td>
<td>617/495-5616</td>
<td>Submitted</td>
<td>08/12/2019 08:43 AM</td>
</tr>
<tr>
<td>Department Approval</td>
<td>Deana Reardon</td>
<td>Chemistry and Chemical Biology</td>
<td><a href="mailto:deana_reardon@harvard.edu">deana_reardon@harvard.edu</a></td>
<td>617/495-5595</td>
<td>Approved</td>
<td>08/12/2019 08:43 AM</td>
</tr>
<tr>
<td>Back Office</td>
<td>Janar Nelson</td>
<td>Human Resources, FAS</td>
<td><a href="mailto:janar@fas.harvard.edu">janar@fas.harvard.edu</a></td>
<td>617/496-4224</td>
<td>Approved</td>
<td>08/12/2019 09:52 AM</td>
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<td>Back-Office Final</td>
<td>Robert Bellantoni</td>
<td>Human Resources, FAS</td>
<td><a href="mailto:rbellantoni@fas.harvard.edu">rbellantoni@fas.harvard.edu</a></td>
<td>617/496-1150</td>
<td>Complete</td>
<td>08/12/2019 10:56 AM</td>
</tr>
</tbody>
</table>

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**).