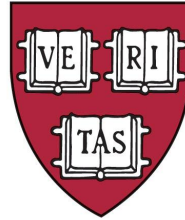# HARVARD
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ADMINISTRATIVE OPERATIONS

Position Tracking & Reporting Rollout

Impact of PTR to FAS Users

Agenda

- Position Tracking & Reporting (PTR) Project Overview

  - Conversion - phase 1 complete!

- Changes to New Hire

- Changes to Job Data Changes

- Changes to Reclass

- Aurora & Harvard Careers Demo

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PTR Project Overview

- Benefits

- Governance structure

- Timeline

- Systems Impacted

- Business process changes for the FAS...

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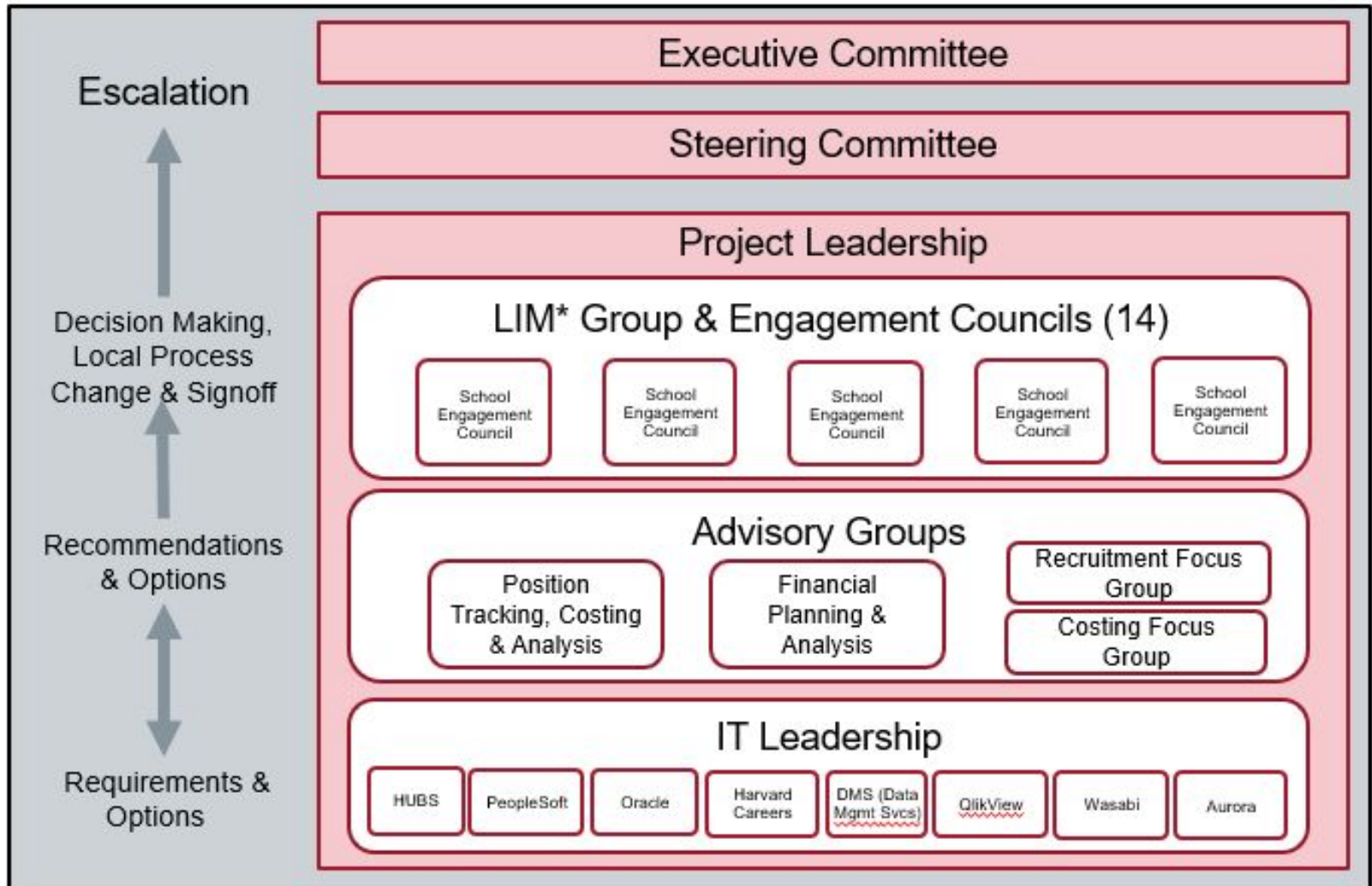ADMINISTRATIVE OPERATIONS

Position Tracking & Reporting (PTR) Benefits

- Position number is now integrated across enterprise and local systems: OBI/HART, Data Warehouse, Qlikview, Oracle financials, Peoplesoft, HUBS, Harvard Careers, Aurora, PI Dashboard
- Beginning in FY21 – the ability to report on budget to actuals by position due to the addition of position number to the GL.
- Harvard Careers will populate certain data from the position, reducing data entry for departments
- Job Description fields on all Harvard Careers postings will align with the format of Job Framework postings
- Changes to positions will be visible in Aurora immediately following completion of the Edit Position action. Corresponding changes to appointments will be visible in Aurora the day after the action is complete in Aurora.
- Futuristically, position costing in PeopleSoft – spring of 2020.

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Project Governance and Decision Making

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PTR Project Scope & Timeline

- **Scope**:

  - October 2019: Staff, Coaches, Exempt Temps/LHTs

  - April/May 2020: Faculty (Empl Classes F & J)

  - Other employee classes (e.g., lecturers, student temps, graduate student RAs, post docs) are **not** currently in scope

- **Future functionality** (April/May 2020):

  - Position Costing

  - Position Descriptions populate in Harvard Careers

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PTR Systems

PTR Project Overview: Conversion

- Staff conversion took place the weekend of October 5-6, 2019

- New PeopleSoft positions were created for all active Staff employees

- FAS HR created PeopleSoft positions for approved vacant positions in Aurora and for Exempt Temps, who were not included in the automated process

- Aurora mapped PeopleSoft positions to existing Aurora positions so historic/legacy data can be viewed alongside PeopleSoft data on the Position Homepage

Changes to New Hire

1. A position needs to be created and fully approved in Aurora prior to creating a requisition in Harvard Careers. In addition to job code, position number is a required field in Harvard Careers.

   a. Before creating or editing a position for posting, work with your divisional recruiter to finalize the position description.

   b. Update the position description and any other relevant position data (e.g., vacant reclass) in Aurora through Edit Position before creating the requisition in Harvard Careers.

NOTES:

   - Approval workflows for positions and reqs have not changed - only the order of operations: create/edit position first, then create req.

   - Once a req is created any changes to the position will not update the req.

   - Edits made to a req will not update the position. A separate Edit Position action must be created to capture any changes.

Changes to New Hire

2. The following req fields in Harvard Careers now populate from the position:

Not Editable	Editable
Business Title	Term Appointment
Salary Admin Plan	Standard Hours
Union	Full/Part Time

3. All Harvard Careers postings now align with the format of Job Framework postings and include the following fields:

Job Summary*	Typical Core Duties[+]	Physical Requirements
Job Specific Responsibilities*	Additional Qualifications	Working Conditions
Basic Qualifications*	Certificates & Licenses	Additional Information

The current Duties & Responsibilities field has been replaced by Job Summary and Job Specific Responsibilities fields.

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Changes to New Hire

Current Non-Framework Posting:

Duties & Responsibilities

Working in a multi-faceted team environment as part of the Administrative Operations (ASAP team), develops and maintains subject matter expertise on Harvard University's administrative systems including: University financial, human resource/payroll systems (Oracle, PeopleSoft), etc..

Substitute for a permanent staff member in academic and administrative departments during short- and long-term absences and during periods of high-volume activity. Assist Department Administrators with budget management by generating reports,etc...

New Non-Framework Posting:

Job Summary

Working in a multi-faceted team environment as part of the Administrative Operations (ASAP team), develops and maintains subject matter expertise on Harvard University's administrative systems including: University financial, human resource/payroll systems (Oracle, PeopleSoft), etc...

Job Specific Responsibilities

Substitute for a permanent staff member in academic and administrative departments during short- and long-term absences and during periods of high-volume activity. Assist Department Administrators, etc...

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Changes to New Hire

4. On the Hire/Transfer form in Aurora, fields owned by the position will populate from the position and will not be editable:

Job Code	PeopleSoft Department
Salary Grade	Salary Admin Plan
Business Title	Union Code

If the data is incorrect on the position, an Edit Position action will need to be processed prior to the New Hire action being created.

5. Any changes to Position Description fields made to a requisition in Harvard Careers are longer pulled into Aurora. A separate Edit Position action must be created to capture these changes.

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Changes to Job Data Changes

1. Certain data is owned by the position (e.g. job code, PS department) and must be modified on the position rather than the job.

   a. Changes to core fields are made through Edit Position, which is available for filled positions

   b. Edit Position now has Action Reasons like Job Data Change

   c. When a change is made on a position a corresponding job row will generally be created in PeopleSoft, with the Action Code of POS and an Action Reason corresponding to the position change (e.g. POS JRU for reclass upgrade, POS UPD for update, etc.)

   d. The change will be visible on the corresponding appointment the day after the Edit Position action completes the approval workflow in Aurora

2. Data owned by the position cannot be changed retroactive to a date prior to position conversion!

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Changes to Reclass

1. The Job Code field is owned by the position, so the Reclass action is no longer available for Staff.

2. Two actions need to be created in Aurora to accomplish a reclass:

   a. *Edit Position* to change the Job Code and any other desired position fields (e.g. FTE)

   b. *Job Data Change* of Type *Salary* to change the compensation

   Except when there is a change in Employee Class (e.g., non-exempt to exempt), these actions can be created and work their way through the approval workflow concurrently.

   Create the Edit Position action first and then reference this action in the Job Data Change - Salary action.

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Aurora & Harvard Careers Demo

1. <u>Aurora</u>:

    a. Appointment/Position Lookup

        i. Converted position

    b. Reclass

        i. Attempt Reclass on appointment with converted position

        ii. Edit Position

2. <u>Harvard Careers</u>:

    a. Create requisition with PeopleSoft Position

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