

**Position based hierarchy: -**

1. Positions: we need employee job, department and assign it to employee, later we will create the positions, for creating positions we required job, department.
2. Position hierarchy(or)position tree
3. Assign position to employees
4. Create the approval rules with position hierarchy
5. Create transaction/ purchase requisition / cross -check

ABC Procurement Director

ABC Procurement Manager

ABC Procurement consultant

**Sample data: -**

Employee	Job	Department	Position
Scm10.student	ABC Consultant	ABC Procurement Dept	ABC Procurement Consultant
thomas.mack	ABC Manager	ABC Procurement Dept	ABC Procurement Manager
michael.buchanan	ABC Director	ABC Procurement Dept	ABC procurement Director

**Step1 : - Create Positions:-**

Before creating positions, we need to create the departments, job and assign it to the employees.

Department: ABC Procurement dept

Jobs: - as shown below

Scm10.student	ABC Consultant
thomas.mack	ABC Manager
michael.buchanan	ABC Director

Goto> Manage users > assign and save and close. Screenshots given below.

**Personal Details**

*Last Name	student	Hire Date	8/13/14
First Name	scm10	Phone	555-5555
Middle Names		Work Mobile Phone	
Title	SCM10.STUDENT_euth-	Work Fax	
Email	dev94@oraclepdemos.com		

**User Details**

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account
User Name	SCM10.STUDENT
*Active	Active

No user account selected.

**Employment Information**

*Person Type	Employee	Department	ABC Procurement Department
Legal Employer	US1 Legal Entity	Location	Headquarters
*Business Unit	US1 Business Unit	Mail Stop	
Job	ABC Consultant	Manager	Mack, Thomas
Grade	Mgmt09		

**Personal Details**

*Last Name	Mack	Hire Date	12/22/03
First Name	Thomas	Phone	675-5132
Middle Names		Work Mobile Phone	
Title	Mr.	Work Fax	
Email	thomas.mack_euth-dev94@oraclepdemos.com		

**User Details**

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account
User Name	thomas.mack
*Active	Active

No user account selected.

**Employment Information**

*Person Type	Employee	Department	ABC Procurement Department
Legal Employer	US1 Legal Entity	Location	Redwood City
*Business Unit	US1 Business Unit	Mail Stop	
Job	ABC Manager	Manager	Buchanan, Michael
Grade	Mgmt06		

**Personal Details**

*Last Name	Buchanan	Hire Date	5/9/02
First Name	Michael	Phone	675-5170
Middle Names		Work Mobile Phone	
Title	Mr.	Work Fax	
Email	michael.buchanan_euth-dev94@oraclepdemos.com		

**User Details**

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account
User Name	michael.buchanan
*Active	Active

No user account selected.

**Employment Information**

*Person Type	Employee	Department	ABC Procurement Department
Legal Employer	US1 Legal Entity	Location	Headquarters
*Business Unit	US1 Business Unit	Mail Stop	
Job	ABC Director	Manager	Taylor, William
Grade	Mgmt09		

## 2. Create positions:-

Global search > Manage positions > Click on + Symbol

Position
ABC Procurement Consultant
ABC Procurement Manager
ABC procurement Director

Create Position: Basic Details

Basic Details

\*Effective Start Date: 1/1/51

Name: ABC Procurement Consultant

Code: Generated automatically

Parent Position:

\*Business Unit: US1 Business Unit

Action Reason:

Back Next Save Submit Cancel

Create Position: Position Details

Effective Start Date: 1/1/51

Business Unit: US1 Business Unit

Name: ABC Procurement Consultant

Status: Active

Department: ABC Department

Job: ABC Consultant

Location:

Manager:

At Risk:

Area:

Assignment Category:

Full Time or Part Time: Full time

Regular or Temporary: Regular

Attachments: None

Special Code:

Context Value:

Back Next Save Submit Cancel

Save and submit and close, repeat it for second and third positions.

Create Position: Basic Details

Basic Details

\*Effective Start Date: 1/1/51

Name: ABC Procurement Manager

Code: Generated automatically

Parent Position:

\*Business Unit: US1 Business Unit

Action Reason:

Back Next Save Submit Cancel

### Third position

Save , submit it. We have created three positions.

### Step3: Creating position Hierarchy:-

Click on the actions> Create Tree

Code	Set	Status	Tree Structure	Effective Start Date	Effective End Date
ABC_POSITION_TREE	Common Set		PER_POS_TREE_STRUCTL		
PL_POSITION	Common Set		PER_POS_TREE_STRUCTL		
POS100	Common Set		PER_POS_TREE_STRUCTL		
PROGUKPOSTREE	Common Set		PER_POS_TREE_STRUCTL		

Enter tree details and next , submit it.

**Position Tree Structure will be like shown below:-**

Procurement director

  Procurement Manger

    Procurement Consultant

You have to enter the nodes as shown below.

Manage Position Trees

Search

Tree Name

Search Results

Name	Set	Status	Tree Structure	Effective Start Date	Effective End Date
ABC POSITION TREE	Common Set	PER_POS_TREE_STRUCTL			
PL_POSITION	Common Set	PER_POS_TREE_STRUCTL			
POS100	Common Set	PER_POS_TREE_STRUCTL			
PROGUKPOSTREE	Common Set	PER_POS_TREE_STRUCTL			

Select our tree, Click on the Tree version

Manage Position Trees: Specify Definition

Name V1

Description

Note

Tree Structure Code PER\_POS\_TREE\_STRUCTURE

Effective Start Date 12/15/24

Effective End Date m/d/y

Status Draft

Next

Enter the version and start date.

Now we will add the positions in the tree

Manage Position Trees: Specify Nodes

Name V1

Description

Add Tree Node

Tree Node Type Specific value

Data Source Position Tree Data Source

Search

Click on + symbol, search for the positions (First director, under director add manger, under manger add consultant)

Manage Position Trees: Specify Nodes ?

Node operations performed on the tree version are automatically saved to the database. You can not undo the changes using the Cancel button.

Name	Code	Business Unit	Status
ABC Procurement Consultant	1252	US1 Business Unit	Active
<b>ABC Procurement Director</b>	<b>1254</b>	US1 Business Unit	Active
ABC Procurement Manager	1253	US1 Business Unit	Active
ABC procurement Director	1255	US1 Business Unit	Active

Manage Position Trees: Specify Nodes ?

Node operations performed on the tree version are automatically saved to the database. You can not undo the changes using the Cancel button.

Node Name	Node Description	Label	Data Source
<b>ABC Procurement Director 1254 1951-01-01</b>			Position Tree Data Source

Under this Position we will add manager

Manage Position Trees: Specify Nodes ?

Node operations performed on the tree version are automatically saved to the database. You can not undo the changes using the Cancel button.

Node Name	Node Description	Label	Data Source
<b>ABC Procurement Director 1254 1951-01-01</b>			Position Tree Data Source
<b>ABC Procurement Manager 1253 1951-01-01</b>			Position Tree Data Source
ABC Procurement Consultant 1252 1951-01-01			Position Tree Data Source

Like that we will add another consultant also as shown above. And submit it.

Tree is created but it is in draft version, we will convert it into active

Manage Position Trees ②

Search

Tree Code:   
Tree Name:

**Confirmation**  
Tree version V1 for tree ABC\_POSITION\_TREE created successfully.  
OK

Advanced Saved Search [Tree Version Audit Results]

Search Reset Save...

Search Results

Name	Code	Set	Status	Tree Structure	Effective Start Date	Effective End Date
ABC Position Tree	ABC_POSITION_TREE	Common Set		PER_POS_TREE_STRUCT		
V1	ABC_POSITION_TREE	Draft		PER_POS_TREE_STRUCT	12/15/24	
APL Position Tree	PL_POSITION	Common Set		PER_POS_TREE_STRUCT		
Position Hierarchy	POS100	Common Set		PER_POS_TREE_STRUCT		
Progress UK Position tree	PROGUKPOSTREE	Common Set		PER_POS_TREE_STRUCT		

Manage Position Trees ②

Search

Tree Code:   
Tree Name:

Advanced Saved Search [Tree Version Audit Results]

Search Reset Save...

Search Results

Code	Set	Status	Tree Structure	Effective Start Date	Effective End Date
ABC_POSITION_TREE	Common Set		PER_POS_TREE_STRUCT		
ABC_POSITION_TREE	Draft		PER_POS_TREE_STRUCT	12/15/24	
PL_POSITION	Common Set		PER_POS_TREE_STRUCT		
POS100	Common Set		PER_POS_TREE_STRUCT		
PROGUKPOSTREE	Common Set		PER_POS_TREE_STRUCT		

Actions View Format Freeze Detach Wrap

Set Status:

You are screen sharing

Select the line go to > actions > set status as active.

Then

Manage Position Trees ②

Tree Version: V1  
Tree: ABC\_POSITION\_TREE

Audit needed for this tree version. Status can be set to active only after successful audit.

**Audit Results**

Actions View Format Freeze Detach Wrap Online Audit Schedule Audit Refresh  Set tree version status to active after audit is successfully complete

Audit Request	Tree Version Name	Audit Result	Tree Structure Code	Tree Code	Start Time	End Time
No data to display.						

**Validation Details**

Actions View Format Freeze Detach Wrap

Name	Validation Result	Validation Message	Corrective Action
No data to display.			

Click on online Audit

Audit completed successfully.

Audit completed successfully.

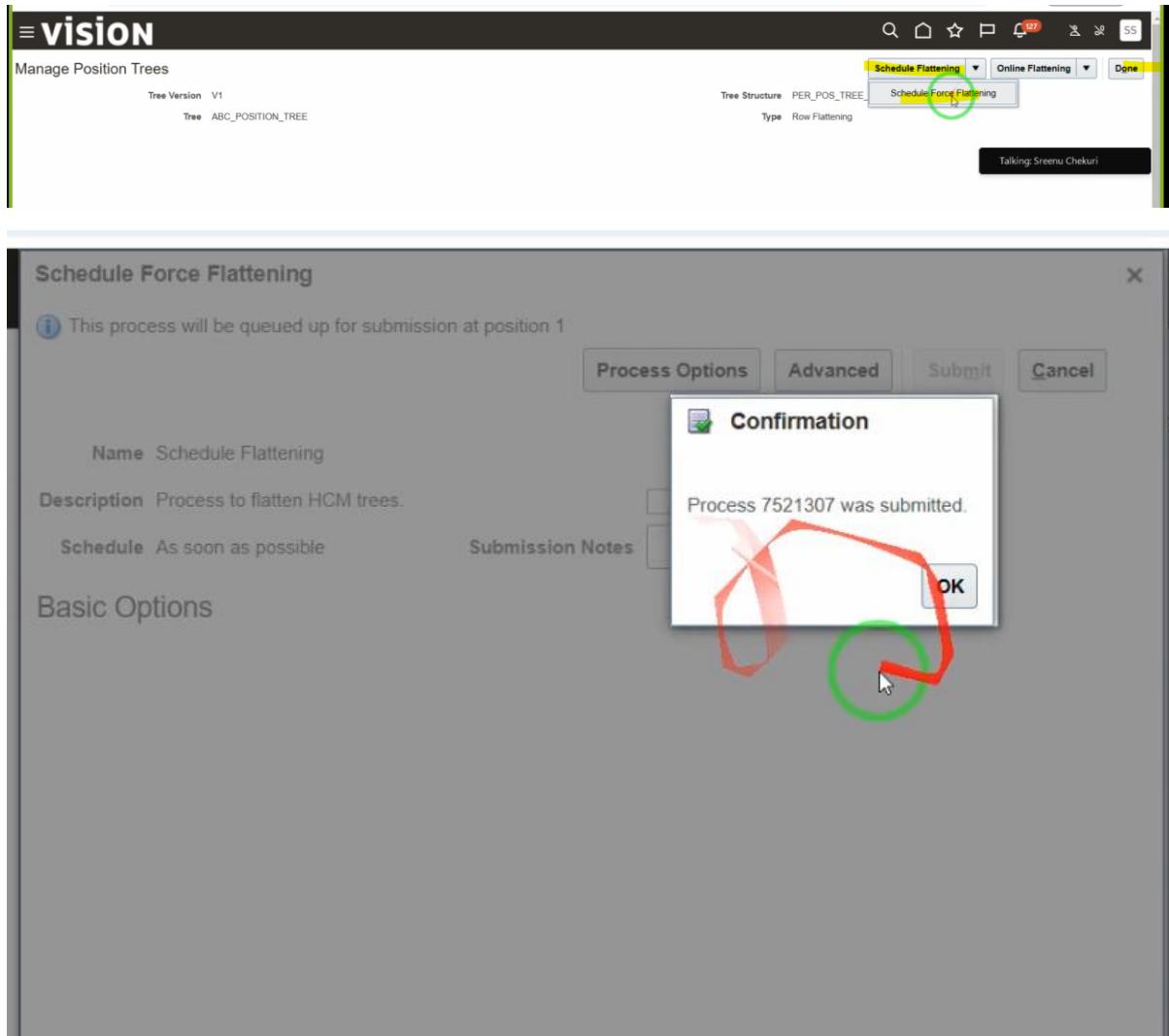
Audit Request	Tree Version Name	Audit Result	Tree Structure Code	Tree Code	Start Time	End Time
-1	V1	<span style="color: green;">✓</span>	PER_POS_TREE_STRUCTURE	ABC_POSITION_TREE	12/15/24 1:18 PM	12/15/24 1:18 PM

Click on Done

Now the tree is active

Actions	Code	Set	Status	Tree Structure	Effective Start Date	Effective End Date
Create Tree	ABC_POSITION_TREE	Common Set	PER_POS_TREE_STRUCTURE			
Create Tree Version	ABC_POSITION_TREE		Active	PER_POS_TREE_STRUCTURE	12/15/24	
Duplicate	PL_POSITION	Common Set	PER_POS_TREE_STRUCTURE			
Edit	POS100	Common Set	PER_POS_TREE_STRUCTURE			
Delete	PROGUKPOSTREE	Common Set	PER_POS_TREE_STRUCTURE			
View Tree Version						
Set Status						
Audit						
Flatten						
	Column Flattening					
	Row Flattening					

Select the line, Goto Actions> Flatten > Row Flattering (you can select any / which will take rowwise/column wise structure)



Done

We have successfully created the position trees.

#### Step4: Assign Positions to the employees

Login with HMCL\_IMPL4. Password: welcome123, actually we do not have these roles.



## My client Groups> Person Management

Update the positions to the employees

This screenshot shows the "Person Management: Search" page. At the top, there's a search bar and filters for Advanced, Saved Search, and All People. Below the search bar are fields for Name (Scm10.student), Person Number, National ID, Keywords, and Effective As-of Date (12/15/24). There's also a checkbox for "Include terminated work relationships". On the right, there are "Search", "Reset", and "Save..." buttons. Below the search bar is a "Search Results" section with a table. The table has columns: Name, Person Number, National ID, Department, Location, User Person Type, Job, Assignment Status, and Actions. A single row is selected, showing "student, scm10" with Person Number 1425, National ID 810-88-8888, Department ABC Procurement Department, Location Headquarters, User Person Type Employee, Job ABC Consultant, Assignment Status Active - Payroll Eligible, and Actions. A green circle highlights the Person Number field in the search results table.

Search with employee

Click on employee

This screenshot shows the "Employment" details page for employee E1425. At the top, it says "Work Relationship" with "Legal Employer" US1 Legal Entity, "Worker Type" Employee, and "Hire Date" 8/13/14. It also shows "Country" United States. Below this is the "Assignment: E1425" section. Under "Action" it says "Position Change" and "Action Reason". The "Assignment Details" section shows "Assignment Number" E1425 and "Business Unit" US1 Business Unit. To the right, it shows "Effective Start Date" 12/15/24 (1 of 1) and "Effective End Date". A green circle highlights the "Edit" button in the toolbar. The toolbar also includes "View History", "Update", "Collect", and "Delete Record".

Employment

Work Relationship

Legal Employer: US1 Legal Entity  
Worker Type: Employee  
Hire Date: 8/13/14

Assignment: E1425

Action: Position Change  
Action Reason:

Assignment Details

Update Employment

Country: United States

\* Effective Start Date: 12/15/24

\* Action: Position Change

Action Reason:

OK Cancel

Enter the reason for update.

Assignment Number: E1425

\* Person Type: Employee

\* Business Unit: US1 Business Unit

\* Assignment Status: Active - Payroll Eligible

Primary: Yes

Projected End Date: m/d/yy

Job Details E1425

Position: ABC Procurement Consultant

\* Synchronize from Position: No

Job: ABC Consultant

Assignment Name: E1425

Grade Ladder:

Grade: Mgmt09

Measurement Period Start Date: m/d/yy

Basis for Seniority Calculation

Position Details

Do you want to apply the following changed data from the position?

Full Time or Part Time: Full time

Regular or Temporary: Regular

Yes No

Save, review later submit, repeat for other two employees

Search

Advanced Saved Search All People \* Required

\*\* At least one is required

\*\* Name: thomas.mack

\*\* Person Number

\*\* National ID

\* Effective As-of Date: 12/15/24

Search Results

Name Person Number National ID Department Location User Person Type Job Assignment Status Actions

Mack, Thomas	287	454-02-1132	ABC Procurement Department	Redwood City	Employee	ABC Manager	Active - Payroll Eligible	
--------------	-----	-------------	----------------------------	--------------	----------	-------------	---------------------------	--

Columns Hidden: 11

\* Business Unit: US1 Business Unit

Projected End Date: m/d/yy

Job Details ET287

Position: ABC Procurement Manager

\* Synchronize from Position: No

Job: ABC Manager

Assignment Name: Vice President

Grade Ladder:

Grade: Mgmt06

Include in Grade Step Progression

Department: ABC Procurement Department

Reporting Establishment

Location: Redwood City

Basis for Seniority Calculation

Work Measure Details

ACA Eligibility

ACA Full Time

Position Details

Do you want to apply the following changed data from the position?

Full Time or Part Time: Full time

Regular or Temporary: Regular

Yes No

Administrative Period End Date: m/d/yy

Stability Period Start Date: m/d/yy

Save, review and submit

The screenshot shows the Oracle HCM Person Management: Search interface. A green circle highlights the search results table. The table includes columns: Name, Person Number, National ID, Department, Location, User Person Type, Job, Assignment Status, and Actions. One row is selected, showing Buchanan, Michael as the Name, 3791 as the Person Number, 123-89-3456 as the National ID, ABC Procurement Department as the Department, Headquarters as the Location, Employee as the User Person Type, ABC Director as the Job, Active - Payroll as the Assignment Status, and a Talking: Sri status.

The screenshot shows the Oracle HCM Job Details interface. A green circle highlights a modal dialog titled "Position Details". The dialog asks if you want to apply changed data from the position, with options for Full Time or Part Time (Full time) and Regular or Temporary (Regular). It also shows Measurement Period Start Date, Measurement Period End Date, and Administrative Period Start Date fields. A "Yes" button is highlighted with a green circle.

Save, review and submit

Assigned to all the employees. It's done

#### Step 4: Create the approval rules with position hierarchy

Goto Requisitions approvals>

The screenshot shows the Oracle HCM Vision interface under the Setup: Procurement section. A green circle highlights the "Approval Management" link in the Functional Areas sidebar. The main content area shows the "Approval Management" section with tabs for View, Format, Freeze, Detach, Wrap, Show, and Required Tasks. Under the Task tab, "Manage Requisition Approvals" is selected. A green circle highlights the "Scope" button. A "Talking:" status bar is visible at the bottom right.

This screenshot shows the 'Manage Requisition Approvals' page in Oracle Fusion. It lists various stages and their participants, along with their routing and voting regimes. A specific row for 'Header Stage' is highlighted with a yellow background.

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
Header Preapproval Stage	Preapproval Header First Responder Wins	Parallel	First Responder Wins	
Header Preapproval Stage	Preapproval Header Hierarchy	Serial		
Header Stage	Header Hierarchy	Serial		
Header Stage	Header First Responder Wins	Parallel	First Responder Wins	
<b>Header Stage</b>	<b>Header Consensus</b>	Parallel	Consensus	<input checked="" type="checkbox"/>
Header Stage	Header Hierarchy 2	Serial		
Header Stage	Header Hierarchy 3	Serial		
Header Postapproval Stage	Postapproval Header Consensus	Parallel	Consensus	
Header Postapproval Stage	Postapproval Header First Responder Wins	Parallel	First Responder Wins	
Header Postapproval Stage	Postapproval Header Hierarchy	Serial		
Header Postapproval Stage	Funds Override Approval	Parallel	Consensus	

This screenshot shows the 'Requisition Bu equals to US1 amount greater than 5000: Details' screen. It displays conditions and actions for approval routing. A modal dialog titled 'Edit Action 1' is open, showing the configuration for the approval action.

**Conditions:**

- Category Hierarchy Level 1 is not blank (Medium)
- Category Hierarchy Level 2 is not Hard (Medium)
- Procurement Category Hierarchy Level 1 Is not blank
- Procurement Category Hierarchy Level 2 Is not blank AND Procurement Category Hierarchy Level 2 Does not equal Hardware

**Actions:**

- Action 1 (Approval required, Route Using Position hierarchy, Position Hierarchy ABC Position Tree, Position Chain Of Requester's Position, Start With Requester's Position, Minimum Job Level 30, Top Position in Hierarchy ABC Procurement Director, Include All approvers)

Change the actions> route using position hierarchy

Save, deploy it

**Step5:- Create transaction/ purchase requisition / cross -check**

We have created one purchase requisition and using the position hierarchy approvals

The screenshot shows a requisition details page for PR20240176US. At the top, it displays basic information: Requisitioning BU - US1 Business Unit, Entered By - scm10 student, Creation Date - 12/15/24, Status - Approved, Justification - Position Based hierarchy, Requisition Amount - 10,000.00 USD, Approval Amount - 10,950.00 USD, and Attachments - None.

**Requisition Lines:**

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Order	Line Life Cycle
1	AS00109	Linux	Software	10	Ea	1,000.00 USD	10,000.00	Approved		

**Line 1: Details:**

Requester	scm10 student	Destination Type	Inventory
Requested Delivery Date	12/18/24	Subinventory	Stores
Deliver-to Location Type	Internal	Buyer	Calvin Roth
Deliver-to Location	Seattle	Suggested Supplier	ABC Bank
		Supplier Item	

**Billing:**

Distribution	Charge Account	Percentage	Quantity	Amount (USD)
--------------	----------------	------------	----------	--------------

**Approval Hierarchy:**

The requisition has a three-level approval hierarchy:

- Header Stage:** Parallel stage with three participants:
  - ABC Procurement Consultant** - Assigned to scm10 student on 12/15/24 at 1:41 PM
  - ABC Procurement Manager** - Assigned to scm10 student on 12/15/24 at 1:41 PM
  - ABC Procurement Director** - Assigned to scm10 student on 12/15/24 at 1:41 PM
- Header Stage Consensus:** Three sub-stages under the Header Stage parallel stage.
- Header Stage Consensus Participants:** Three individuals assigned to the Header Stage parallel stage.

It goes to all the 3 persons approvals based on the job level, position tree. If all three persons approved then only our requisition approves.

The screenshot shows the Oracle SCM Procurement homepage. At the top, it features a navigation bar with links for More Tasks, Manage Requisitions, Shopping Lists, and Requester scm10 student.

**Recent Requisitions:**

Requisition ID	Description	Status
PR20240176US	Position Based hierarchy	Approved
PR20240175US	Position Based hierarchy	Approved
PR20240174US	Linux	Pending approval
PR20240169US	11" Netbook AMD 2.3 GHz, 4 GB Memory, Windows 1...	Pending approval
PR20240168US	Linux	Pending approval

**Recent Purchases:**

Item Description	Quantity	Unit Price	Total Price
Linux	1	\$0.00 Ea	\$0.00
11" Netbook AMD 2.3 GHz, 4 GB Memory, Windows 1...	1	\$349.00 Ea	\$349.00
Oracle Linux	1	\$0.00 Ea	\$0.00
CI Series 2000 Laptop, 17.3 inch screen - Cons...	1	\$182.00 Ea	\$182.00
Visor	1	\$33.11 Ea	\$33.11

Sreenivasulu Chekuri

Requisition approved.