

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	<input type="text" value="student"/>	Hire Date	<input type="text" value="8/13/14"/>
First Name	<input type="text" value="scm10"/>	Phone	<input type="text" value="555-5555"/>
Middle Names	<input type="text"/>	Work Mobile Phone	<input type="text"/>
Title	<input type="text" value=""/>	Work Fax	<input type="text"/>
Email	<input type="text" value="SCM10.STUDENT_euth-dev94@oraclepdemos.com"/>		

User Details

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account	
User Name	<input type="text" value="SCM10.STUDENT"/>	<input type="checkbox"/> No user account selected.
*Active	<input type="text" value="Active"/>	

Employment Information

*Person Type	<input type="text" value="Employee"/>	Department	<input type="text" value="ABC Procurement Departmen"/>
Legal Employer	<input type="text" value="US1 Legal Entity"/>	Location	<input type="text" value="Headquarters"/>
*Business Unit	<input type="text" value="US1 Business Unit"/>	Mail Stop	<input type="text"/>
Job	<input type="text" value="ABC Consultant"/>	Manager	<input type="text" value="Mack, Thomas"/>
Grade	<input type="text" value="Mgmt09"/>		

Personal Details

*Last Name	<input type="text" value="Mack"/>	Hire Date	<input type="text" value="12/22/03"/>
First Name	<input type="text" value="Thomas"/>	Phone	<input type="text" value="675-5132"/>
Middle Names	<input type="text"/>	Work Mobile Phone	<input type="text"/>
Title	<input type="text" value="Mr."/>	Work Fax	<input type="text"/>
Email	<input type="text" value="thomas.mack_euth-dev94@oraclepdemos.com"/>		

User Details

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account	
User Name	<input type="text" value="thomas.mack"/>	<input type="checkbox"/> No user account selected.
*Active	<input type="text" value="Active"/>	

Employment Information

*Person Type	<input type="text" value="Employee"/>	Department	<input type="text" value="ABC Procurement Departmen"/>
Legal Employer	<input type="text" value="US1 Legal Entity"/>	Location	<input type="text" value="Redwood City"/>
*Business Unit	<input type="text" value="US1 Business Unit"/>	Mail Stop	<input type="text"/>
Job	<input type="text" value="ABC Manager"/>	Manager	<input type="text" value="Buchanan, Michael"/>
Grade	<input type="text" value="Mgmt06"/>		

Personal Details

*Last Name	<input type="text" value="Buchanan"/>	Hire Date	<input type="text" value="5/9/02"/>
First Name	<input type="text" value="Michael"/>	Phone	<input type="text" value="675-5170"/>
Middle Names	<input type="text"/>	Work Mobile Phone	<input type="text"/>
Title	<input type="text" value="Mr."/>	Work Fax	<input type="text"/>
Email	<input type="text" value="michael.buchanan_euth-dev94@oraclepdemos.com"/>		

User Details

<input checked="" type="radio"/> Enter user name	<input type="radio"/> Link user account	
User Name	<input type="text" value="michael.buchanan"/>	<input type="checkbox"/> No user account selected.
*Active	<input type="text" value="Active"/>	

Employment Information

*Person Type	<input type="text" value="Employee"/>	Department	<input type="text" value="ABC Procurement Departmen"/>
Legal Employer	<input type="text" value="US1 Legal Entity"/>	Location	<input type="text" value="Headquarters"/>
*Business Unit	<input type="text" value="US1 Business Unit"/>	Mail Stop	<input type="text"/>
Job	<input type="text" value="ABC Director"/>	Manager	<input type="text" value="Taylor, William"/>
Grade	<input type="text" value="Mgmt09"/>		

2. Create positions:-

Global search> Manage positions> Click on + Symbol

Position
ABC Procurement Consultant
ABC Procurement Manager
ABC procurement Director

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1 — 2 — 3 — 4 — 5
Basic Details Position Details Evaluation Criteria Profiles Review

Create Position: Basic Details

Back Next Save Submit Cancel

Basic Details

*Effective Start Date 1/1/51

Parent Position

*Business Unit US1 Business Unit

*Name ABC Procurement Consultant

Code Generated automatically

Action Reason

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1 — 2 — 3 — 4 — 5
Basic Details Position Details Evaluation Criteria Profiles Review

Create Position: Position Details

Back Next Save Submit Cancel

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

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

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1 — 2 — 3 — 4 — 5
Basic Details Position Details Evaluation Criteria Profiles Review

Create Position: Basic Details

Back Next Save Submit Cancel

Basic Details

*Effective Start Date 1/1/51

Parent Position

*Business Unit US1 Business Unit

*Name ABC Procurement Manager

Code Generated automatically

Action Reason

Create Position: Position Details

Effective Start Date: 1/1/51
Business Unit: US1 Business Unit
Name: ABC Procurement Manager

Code: Generated automatically
Parent Position:

Position Description

*Status: Active
*Department: ABC Department
*Job: ABC Manager
Location:
Manager:

Assignment Category:
Full Time or Part Time: Full time
Regular or Temporary: Regular
Attachments: None

Confirmation
The request was submitted.
OK

Third position

Create Position: Basic Details

Effective Start Date: 1/1/51
Parent Position:
*Business Unit: US1 Business Unit

*Name: ABC Procurement Director
Code: Generated automatically
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 Director

Code: Generated automatically
Parent Position:

Position Description

*Status: Active
*Department: ABC Department
*Job: ABC Director
Location:
Manager:
At Risk:

Assignment Category:
Full time or Part time: Full time
Regular or Temporary: Regular
Attachments: None
Special Code:

Warning
The request will be submitted. Do you want to continue? (HRC-1035163)
Yes No

Save , submit it. We have created three positions.

Step3: Creating position Hierarchy:-

Manage Position tree

Match With Tasks, Task Lists, Business Objects

Name	Type	Details
Manage Position Trees	Task	

Click on the actions> Create Tree

Manage Position Trees ?

Search

Tree Code

Tree Name

Advanced Saved Search Trees For Given Tree Struct. v

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

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		

Actions: Create Tree, Create Tree Version, Duplicate, Edit, Delete, View Tree Version, Set Status, Audit, Flatten

Manage Position Trees: Specify Definition ?

1 Specify Definition 2 Specify Labels 3 Specify Access Rules

Name

Code

Tree Structure HCM Position Hierarchy Tree Structure

Description

Icon Image

Preview

Back Next Cancel

Data Source Parameters

Actions View Format Clear Reset Save Freeze Detach Wrap

Name	Base Value	Value
Position Tree Data Source		

Enter tree details and next , submit it.

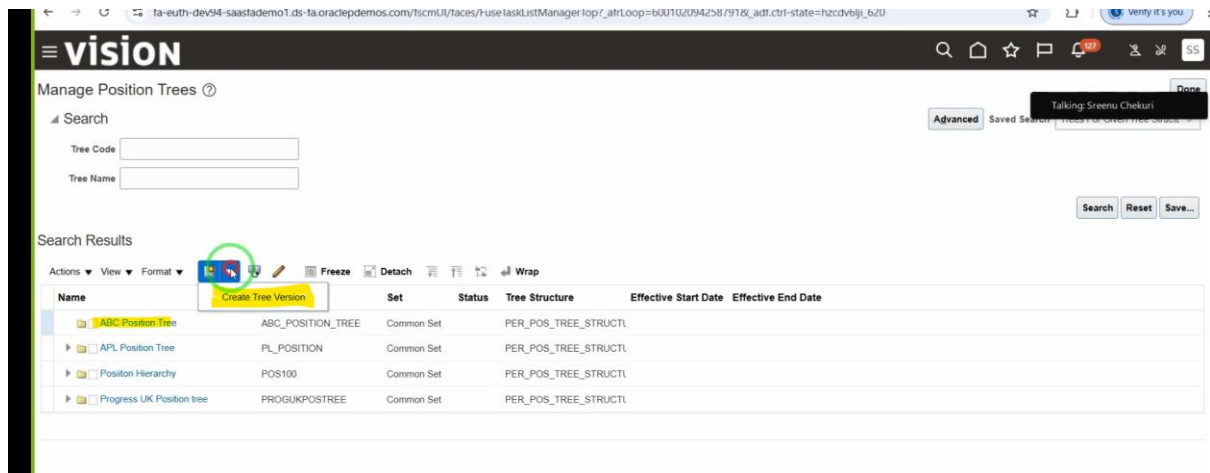
Position Tree Structure will be like shown below:-

Procurement director

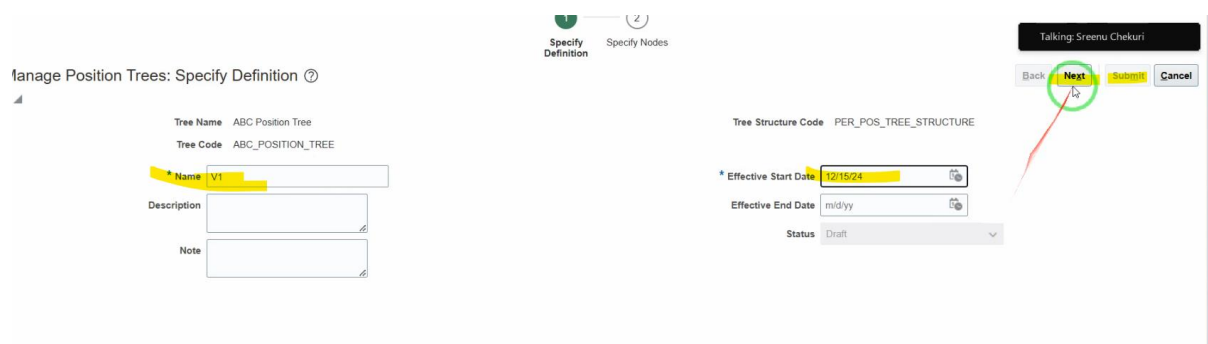
Procurement Manger

Procurement Consultant

You have to enter the nodes as shown below.

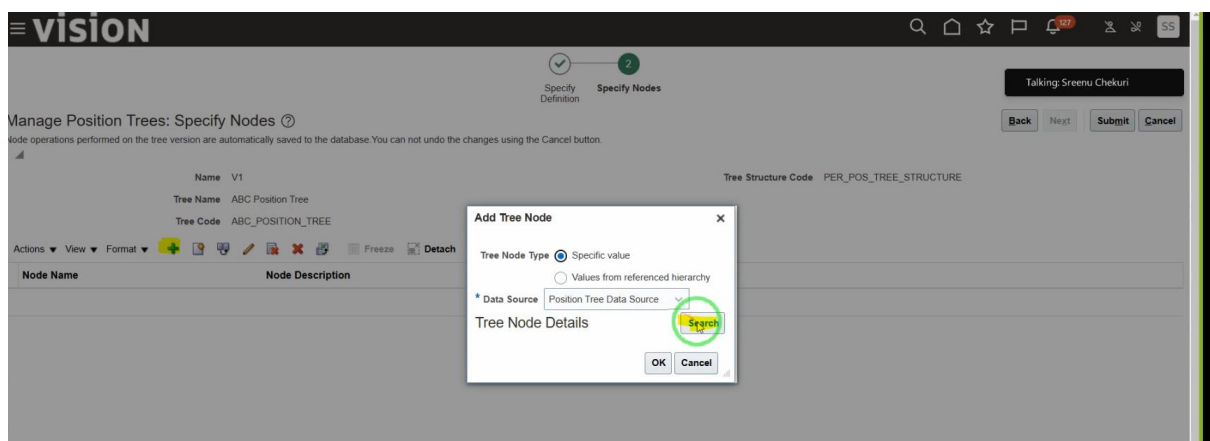


Select our tree, Click on the Tree version

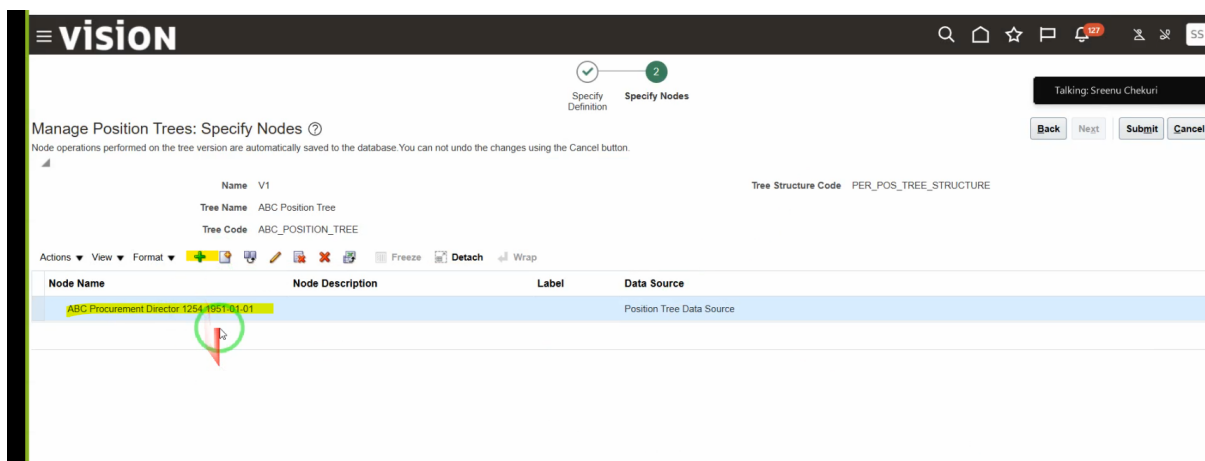
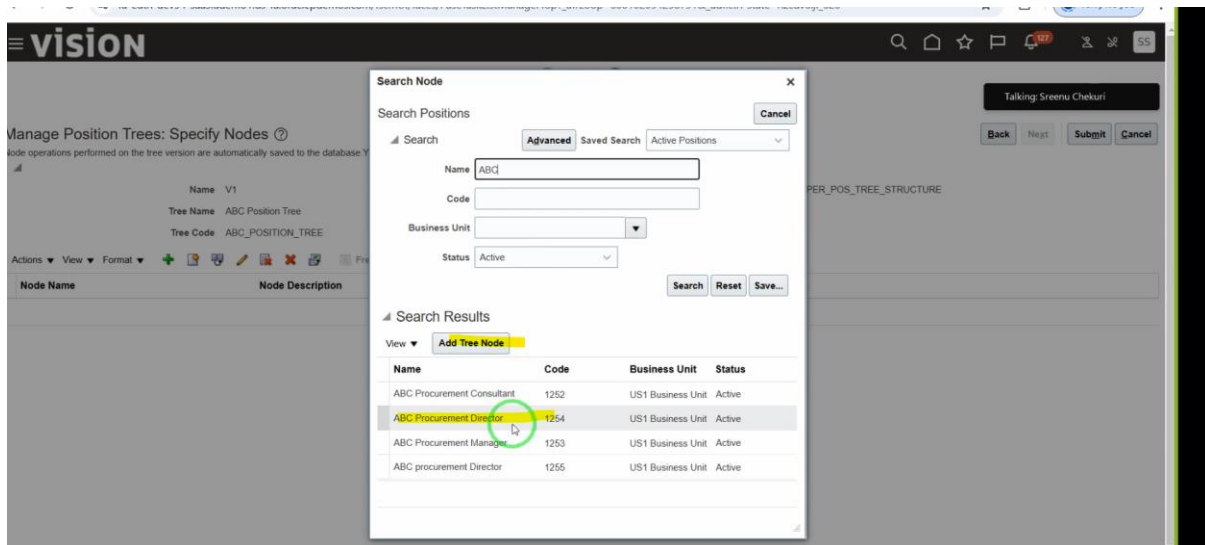


Enter the version and start date.

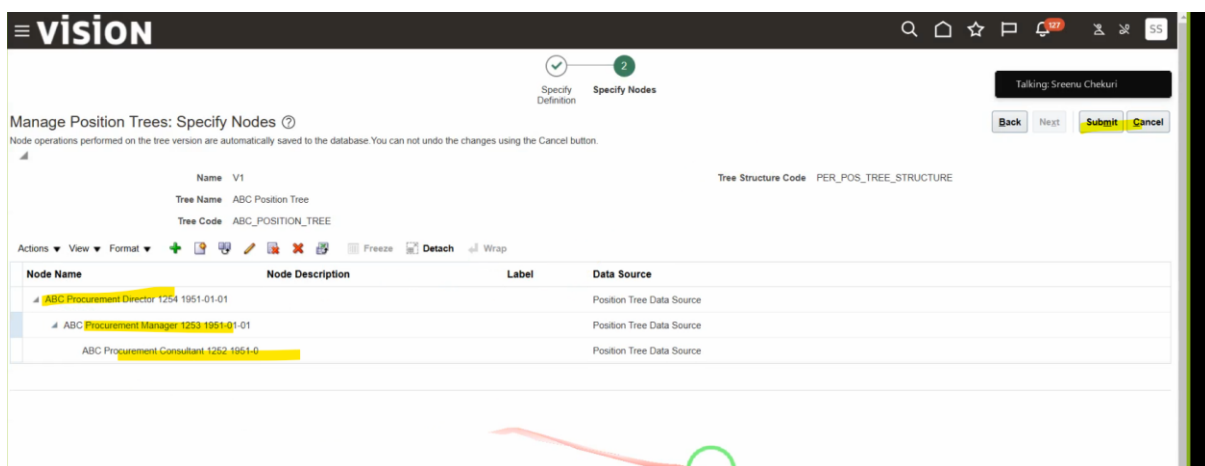
Now we will add the positions in the tree



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



Under this Position we will add manager



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

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Manage Position Trees ?

Search

Tree Code

Tree Name

Confirmation

Tree version V1 for tree ABC_POSITION_TREE created successfully.

OK

Search Results

Actions View Format Freeze Detach Wrap

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

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Manage Position Trees ?

Search

Tree Code

Tree Name

Search Results

Actions View Format Freeze Detach Wrap

Create Tree

Create Tree Version

Duplicate

Edit

Delete

View Tree Version

Set Status

Audit

Flatten

Draft

Active

Inactive

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

You are screen sharing

Stop share

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

Then

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Manage Position Trees ?

Tree Version V1

Tree ABC_POSITION_TREE

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

Tree Structure PER_POS_TREE_STRUCTURE

Audit Type Tree Version

Audit Results

Actions View Format Freeze Detach Wrap Online Audit Schedule Audit Refresh

Set tree version status to active after audit is successfully complete

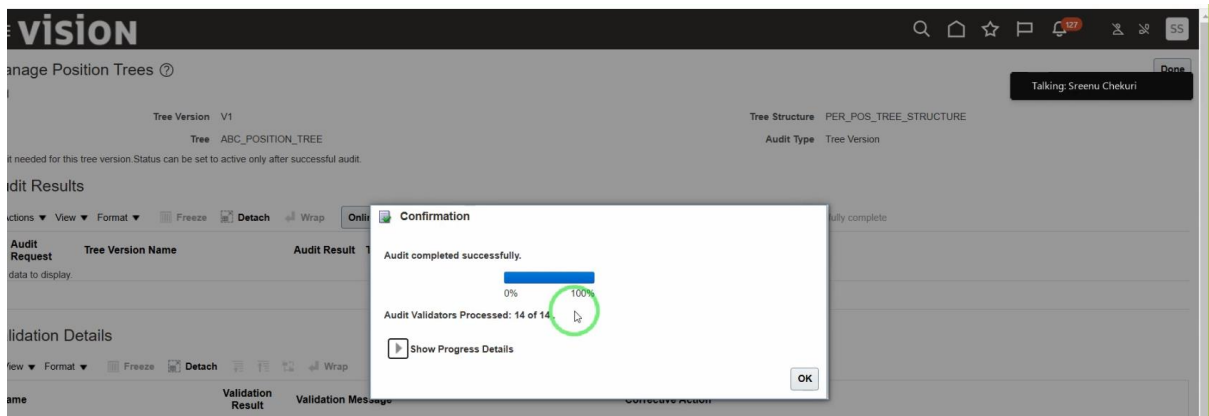
Audit Request	Tree Version Name	Audit Result	Tree Structure Code	Tree Code	Start Time	End Time
No data to display.						

Validation Details

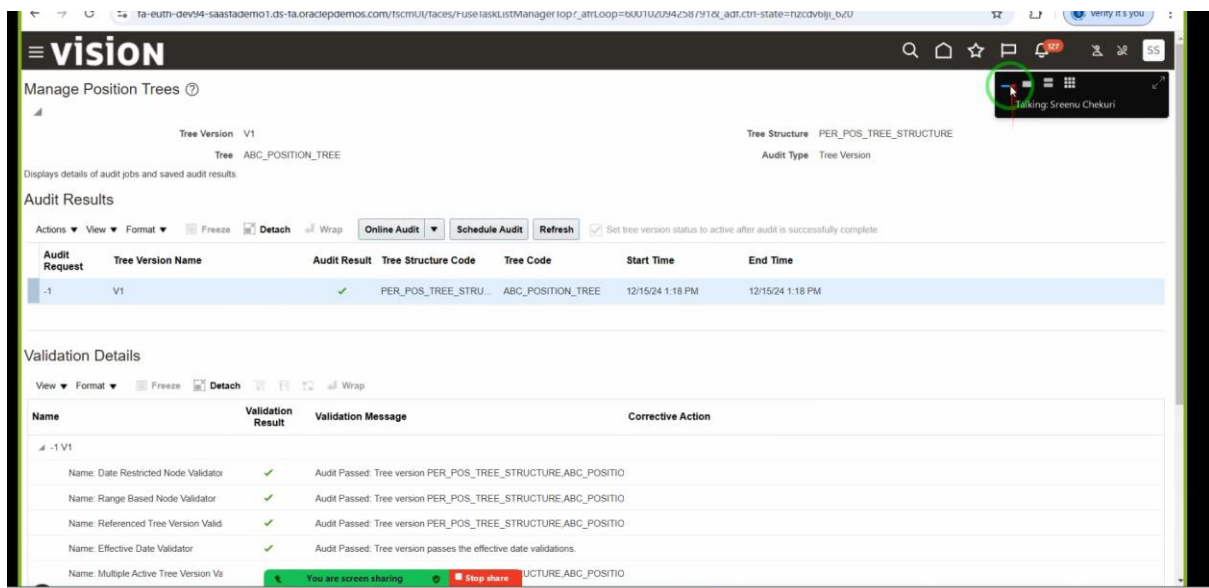
View Format Freeze Detach Wrap

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

Click on online Audit

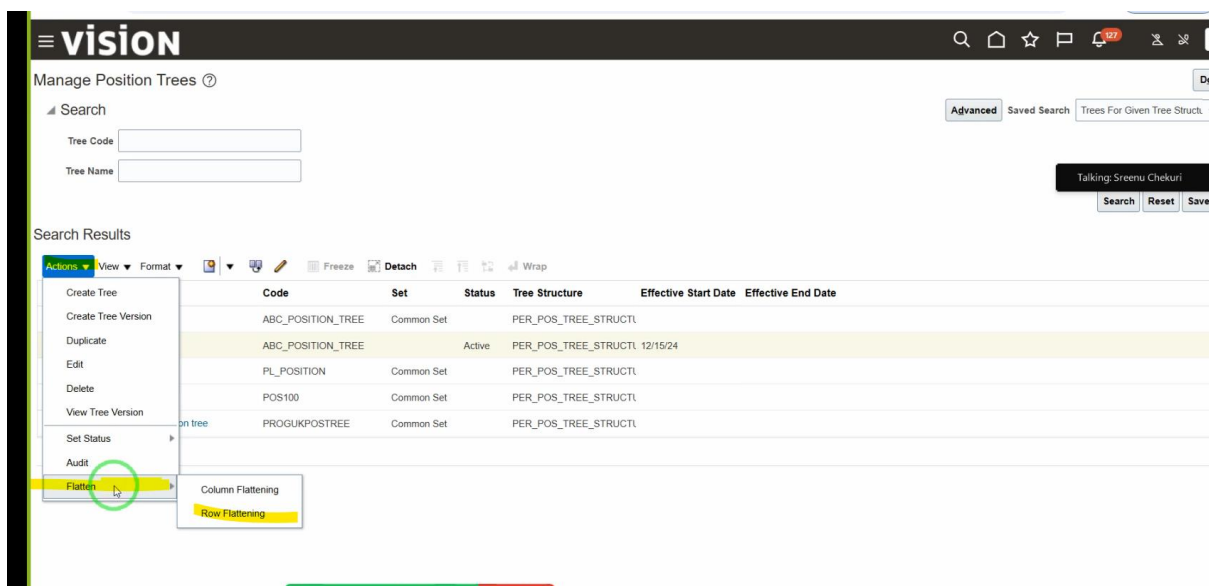


Audit completed successfully.

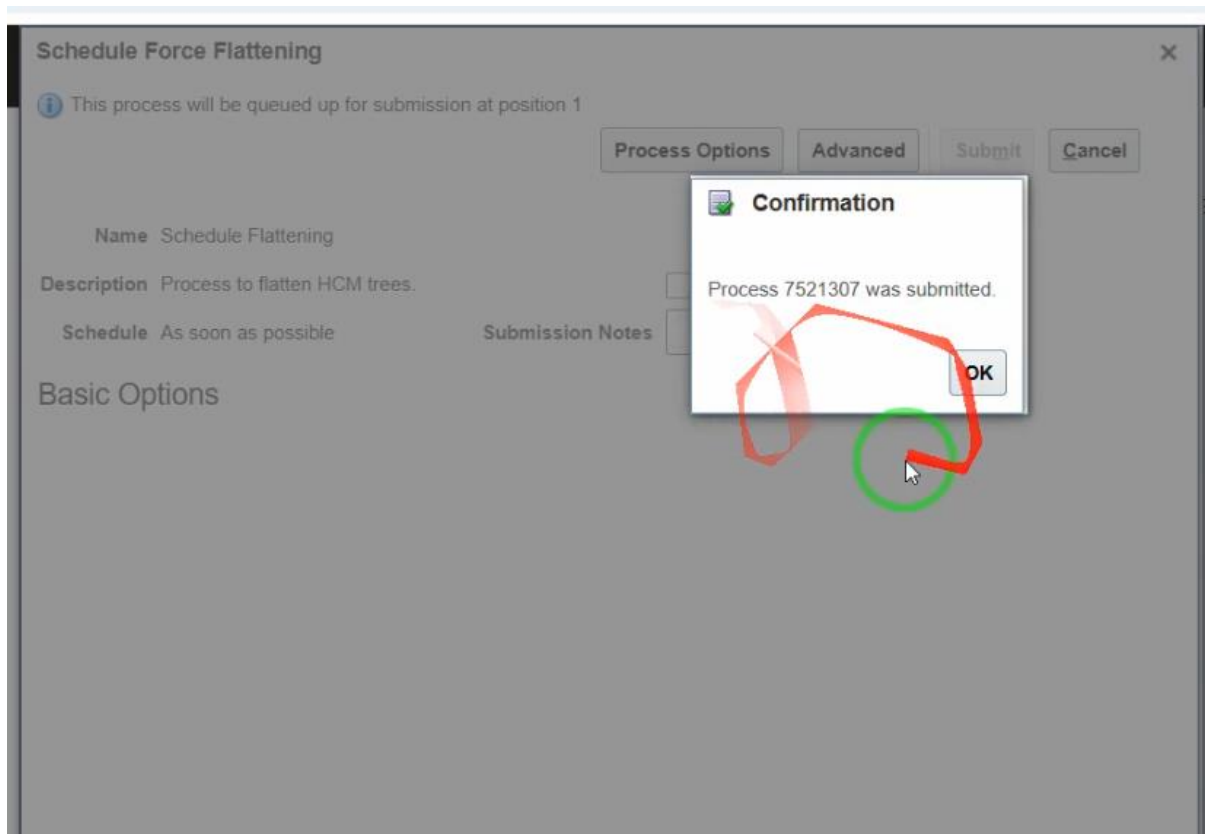


Click on Done

Now the tree is active



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

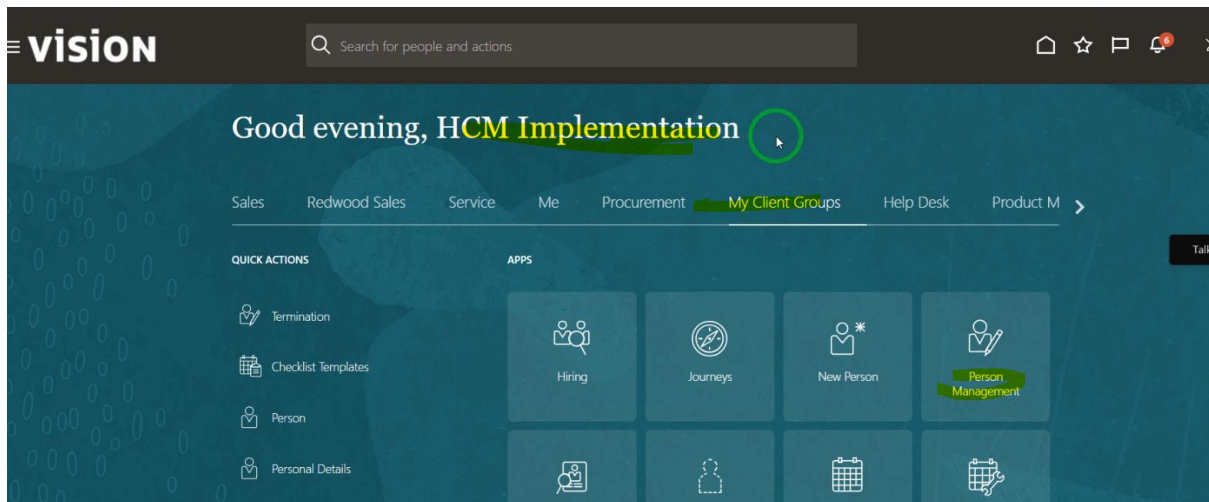


Done

We have successfully created the position trees.

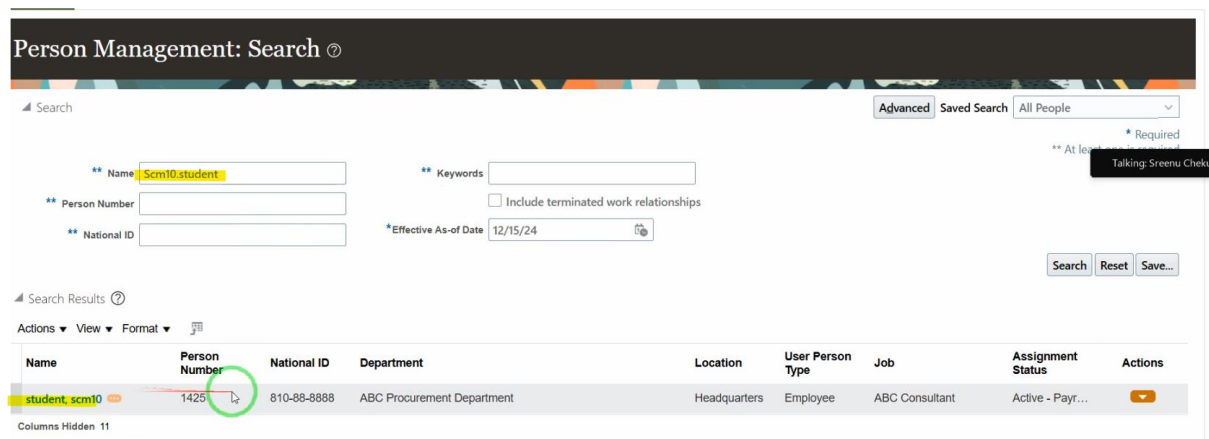
Step4: Assign Positions to the employees

Login with HMCL_IMPL4. Password: welcome123, actually we do not have these roles.



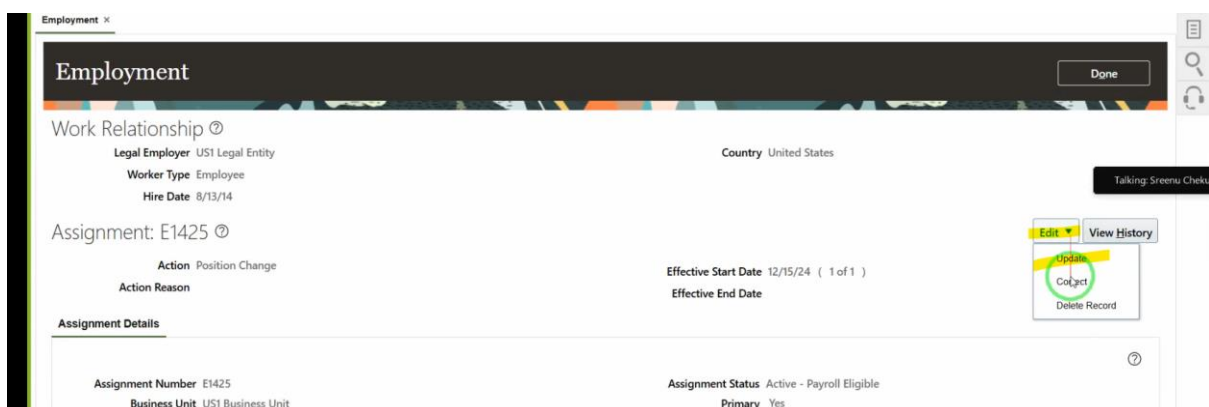
My client Groups> Person Management

Update the positions to the employees



Search with employee

Click on employee



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

Country United States

Update Employment

* 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 Eli
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
* Include in Grade Step Progression

End Time
Basis for Seniority Calculation
Measurement Period Start Date m/d/yy

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

** Name thomas.mack
** Person Number
** National ID
* Effective As-of Date 12/15/24
* Required
** At least one is required
Include terminated work relationships
Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
Mack, Thomas	287	454-32-1132	ABC Procurement Department	Redwood City	Employee	ABC Manager	Active - Payr...	

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

End Time 05:30 PM
Basis for Seniority Calculation
ACA Eligibility
ACA Full Time
Measurement Period Start Date m/d/yy
Administrative Period End Date m/d/yy
Stability Period Start Date m/d/yy

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 and submit

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name michael.buchanan ** Keywords

** Person Number

** National ID

*Effective As-of Date 12/15/24

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
Buchanan, Michael	3791	123-89-3456	ABC Procurement Department	Headquarters	Employee	ABC Director	Active - Payr...	Talking: St...

Person Details

Assignment Number E3791

*Assignment Status Active - Payroll Eli

*Person Type Employee

*Business Unit US1 Business Unit

Primary Yes

Projected End Date m/d/yy

Job Details E3791

Position ABC Procurement Director

*Synchronize from Position No

Job ABC Director

Assignment Name Chief Supply Chain Officer (CSCO)

Grade Ladder

Grade Mgmt09

☒ Include in Grade Step Progression

Department ABC Procurement Department

End Time 05:30 PM

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

Measurement Period Start Date m/d/yy

Measurement Period End Date m/d/yy

Administrative Period Start Date m/d/yy

Save, review and submit

Assigned to all the employees. It's done

Step 4: Create the approval rules with position hierarchy

Goto Requisitions approvals>

fa-euth-dev94-saasdemo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseTaskListManagerTop?_afriLoop=618855664410748&_adf.ctrl-state=2sfscs2g_1366

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Setup: Procurement

Functional Areas

- * Initial Users Shared
- * Enterprise Profile Shared
- * Legal Structures Shared
- * Financial Reporting Structures Shared
- * Organization Structures Shared
- Workforce Structures Shared
- * Users and Security Shared
- * Purchasing Categories Shared
- * Suppliers Shared
- * Approval Management Shared
- * Procurement Foundation Shared
- * Items Shared
- Purchasing Foundation Shared
- Procurement Transaction Account Rules Shared

Change Feature Opt In

Search Tasks

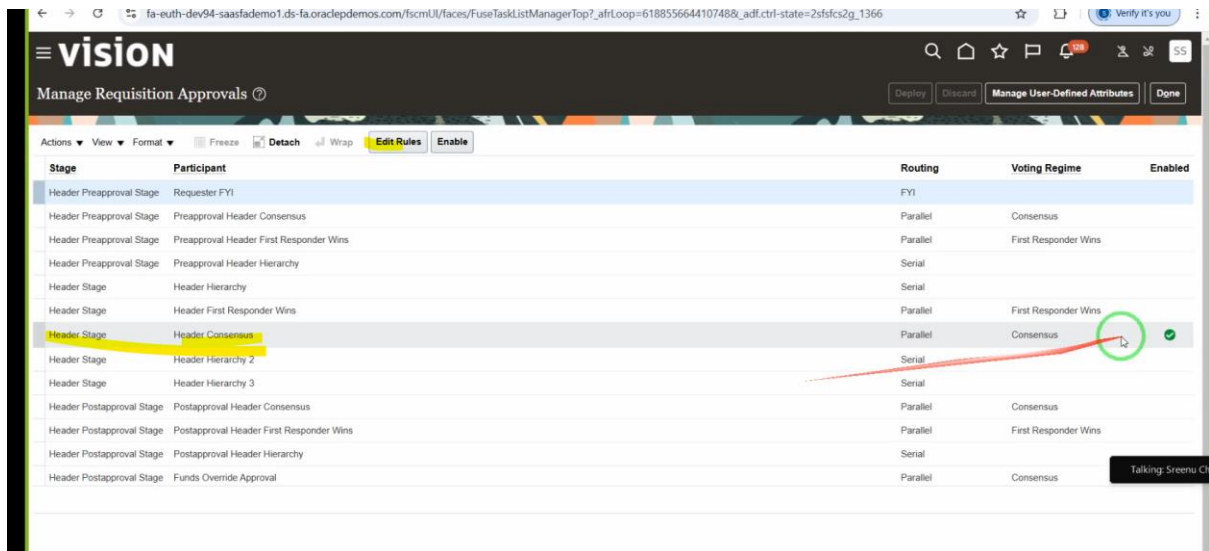
Approval Management

View Format Freeze Detach Wrap Show Required Tasks

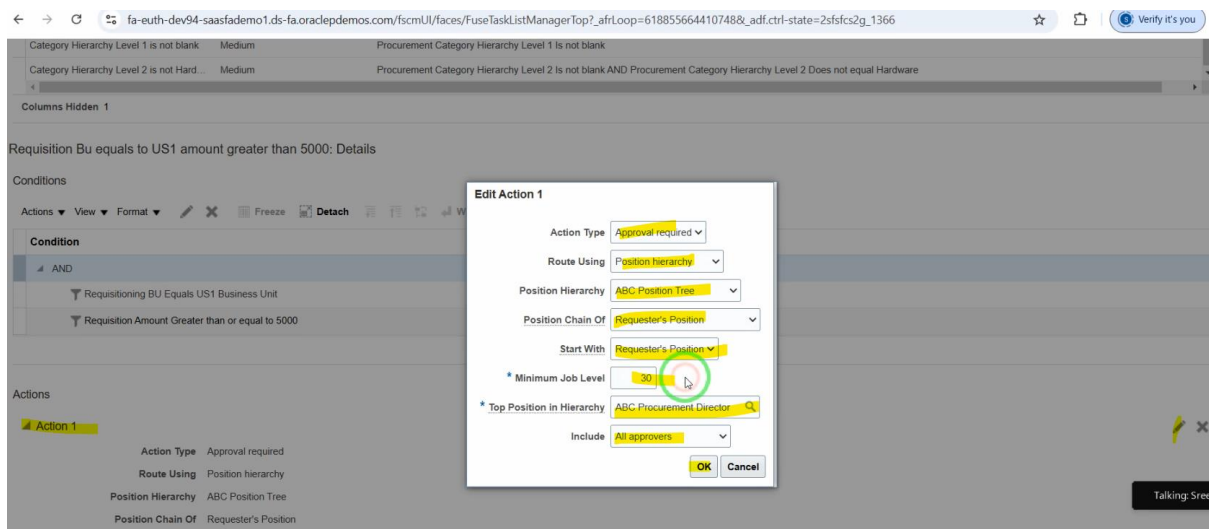
Task	Scope
Manage Requisition Approvals	
Manage Purchasing Document Approvals	

Columns Hidden 4

Talking: St...



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	
Header Stage	Header Consensus	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	



Category Hierarchy Level 1 is not blank Medium Procurement Category Hierarchy Level 1 is not blank

Category Hierarchy Level 2 is not Hard... Medium Procurement Category Hierarchy Level 2 is not blank AND Procurement Category Hierarchy Level 2 Does not equal Hardware

Columns Hidden 1

Requisition Bu equals to US1 amount greater than 5000: Details

Conditions

Condition

- AND
 - Requisitioning BU Equals US1 Business Unit
 - Requisition Amount Greater than or equal to 5000

Actions

Action 1

Action Type 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

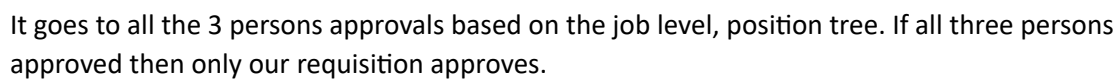
OK Cancel

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



[Requisitions](#)

[Shop by Category](#)

Requester scm10 student

[More Tasks](#)
[Manage Requisitions](#)
[Shopping Lists](#)

Recent Requisitions		
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			
Linux	11" Netbook AMD 2.3 GHz, 4 GB Memory, Windows 1...	Oracle Linux	CJ Series 2000 Laptop, 17.3 inch screen - Corsi...
\$0.00 Ea	\$349.00 Ea	\$0.00 Ea	\$182.00 Ea

Requisition approved.