**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. Crete 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 |
| First Name | scm10 |
| Middle Names | |
| Title | |
| Email | SCM10.STUDENT_euth-dev94@oraclepdemos.com |

| | |
|---|---|
| Hire Date | 8/13/14 |
| Phone | 555-5555 |
| Work Mobile Phone | |
| Work Fax | |

## User Details

○ Enter user name

| | |
|---|---|
| User Name | SCM10.STUDENT |
| *Active | Active |

○ Link user account

No user account selected.

## Employment Information

| | |
|---|---|
| *Person Type | Employee |
| Legal Employer | US1 Legal Entity |
| *Business Unit | US1 Business Unit |
| Job | ABC Consultant |
| Grade | Mgmt09 |

| | |
|---|---|
| Department | ABC Procurement Departmen |
| Location | Headquarters |
| Mail Stop | |
| Manager | Mack, Thomas |

## Personal Details

| | |
|---|---|
| *Last Name | Mack |
| First Name | Thomas |
| Middle Names | |
| Title | Mr. |
| Email | thomas.mack_euth-dev94@oraclepdemos.com |

| | |
|---|---|
| Hire Date | 12/22/03 |
| Phone | 675-5132 |
| Work Mobile Phone | |
| Work Fax | |

## User Details

○ Enter user name

| | |
|---|---|
| User Name | thomas.mack |
| *Active | Active |

○ Link user account

No user account selected.

## Employment Information

| | |
|---|---|
| *Person Type | Employee |
| Legal Employer | US1 Legal Entity |
| *Business Unit | US1 Business Unit |
| Job | ABC Manager |
| Grade | Mgmt06 |

| | |
|---|---|
| Department | ABC Procurement Departmen |
| Location | Redwood City |
| Mail Stop | |
| Manager | Buchanan, Michael |

## Personal Details

| | |
|---|---|
| *Last Name | Buchanan |
| First Name | Michael |
| Middle Names | |
| Title | Mr. |
| Email | michael.buchanan_euth-dev94@oraclepdemos.com |

| | |
|---|---|
| Hire Date | 5/9/02 |
| Phone | 675-5170 |
| Work Mobile Phone | |
| Work Fax | |

## User Details

○ Enter user name

| | |
|---|---|
| User Name | michael.buchanan |
| *Active | Active |

○ Link user account

No user account selected.

## Employment Information

| | |
|---|---|
| *Person Type | Employee |
| Legal Employer | US1 Legal Entity |
| *Business Unit | US1 Business Unit |
| Job | ABC Director |
| Grade | Mgmt09 |

| | |
|---|---|
| Department | ABC Procurement Departmen |
| Location | Headquarters |
| Mail Stop | |
| Manager | Taylor, William |

## 2. Crate positions:-

Global search> Manage positions> Click on + Symbol

| Position |
| --- |
| ABC Procurement Consultant |
| ABC Procurement Manager |
| ABC procurement Director |



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

Third position





Save , submit it. We have created three positions.

**Step3: Creating position Hierarchy:-**

Click on the actions> Create Tree





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.
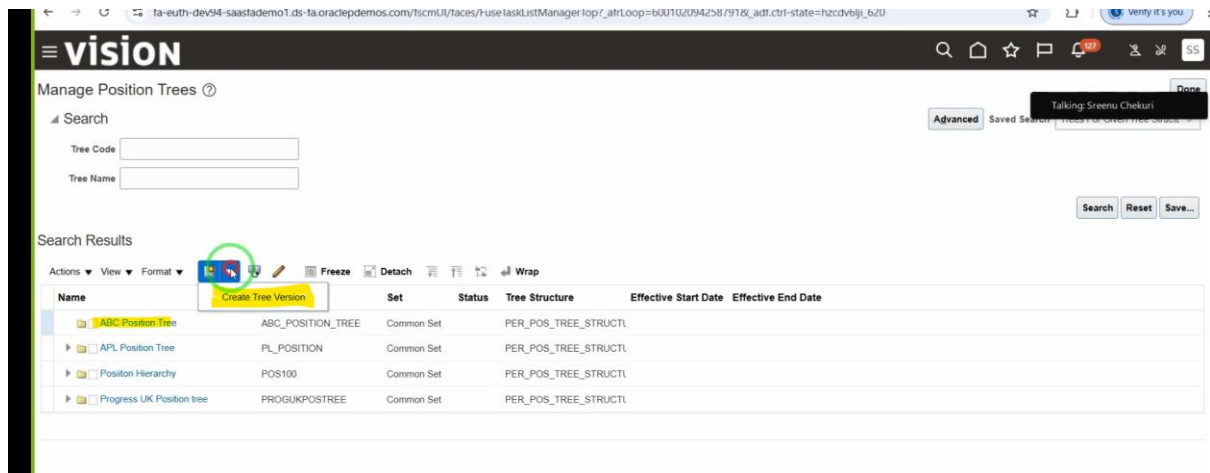
Select our tree, Click on the Tree version
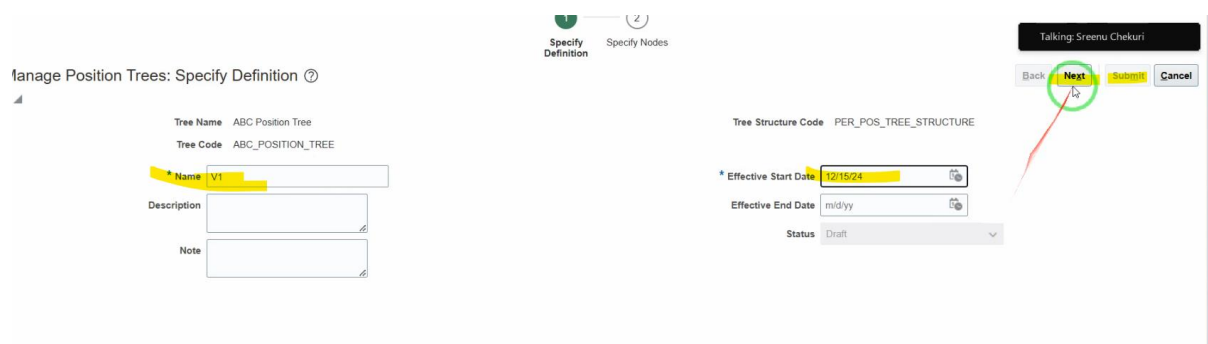


Enter the version and start date.

Now we will add the positions in the tree
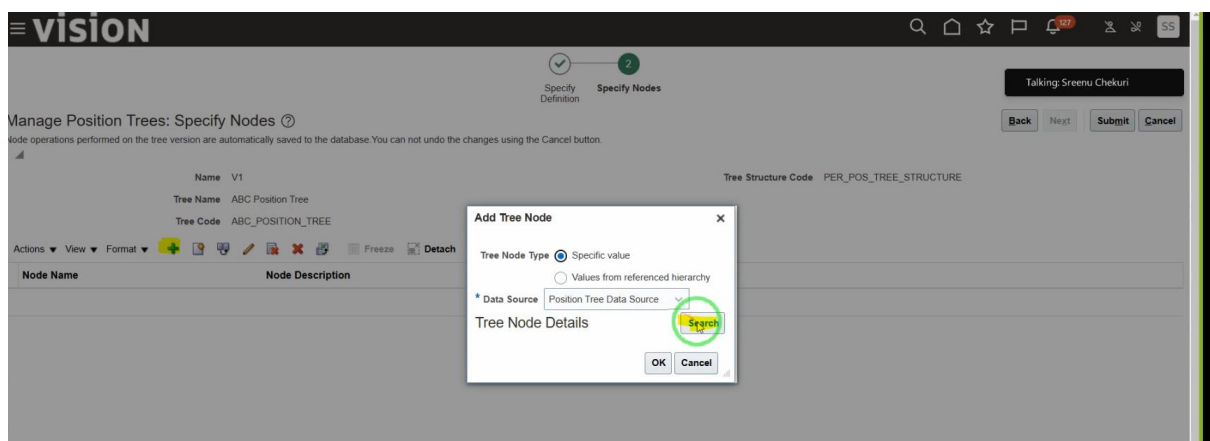


Click on + symbol, search for the positions  (First director, under director add  manger, under manger add consultant)
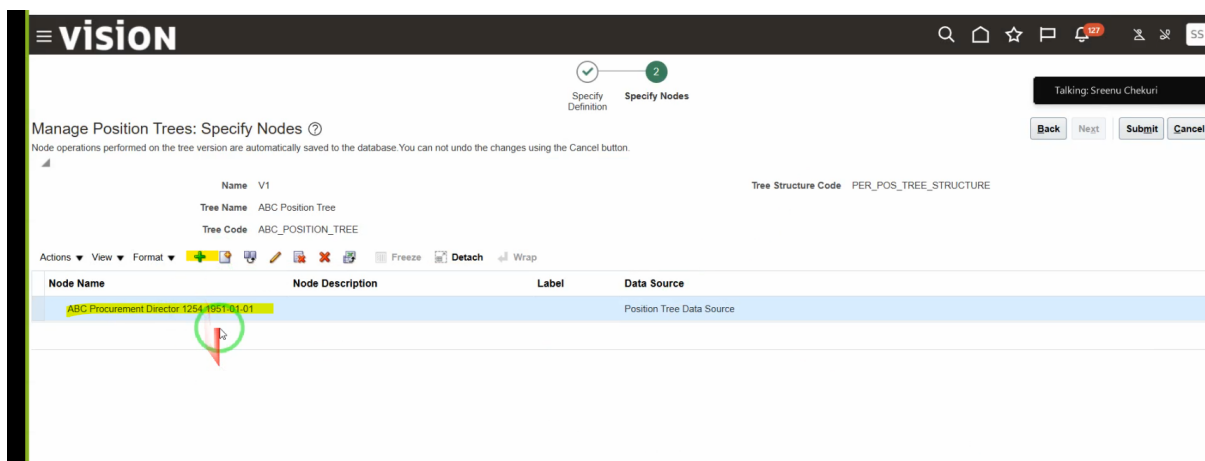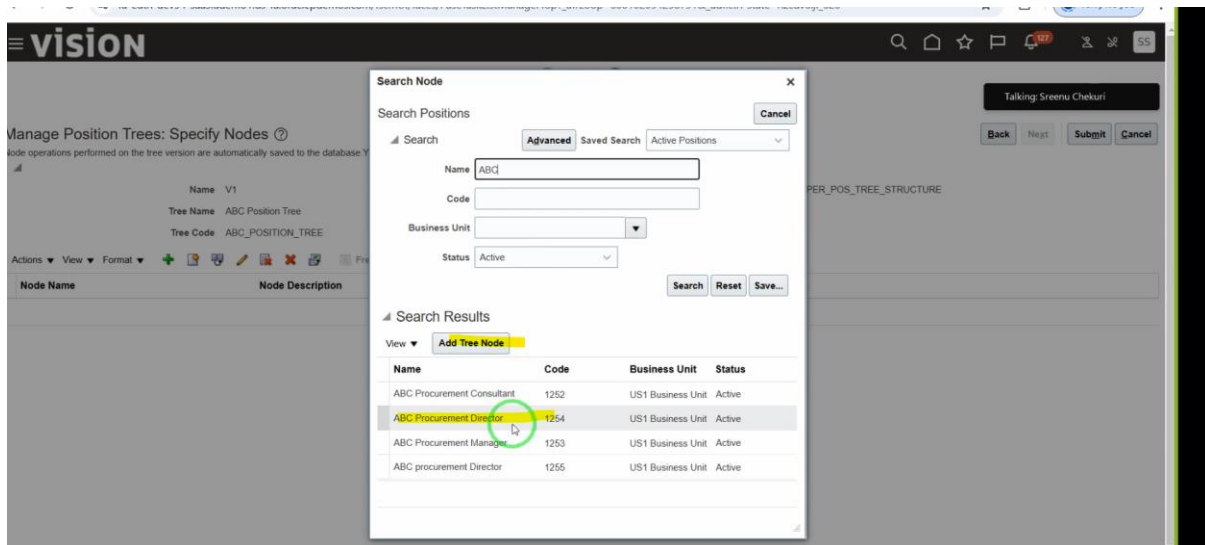
Under this Position we will add manager
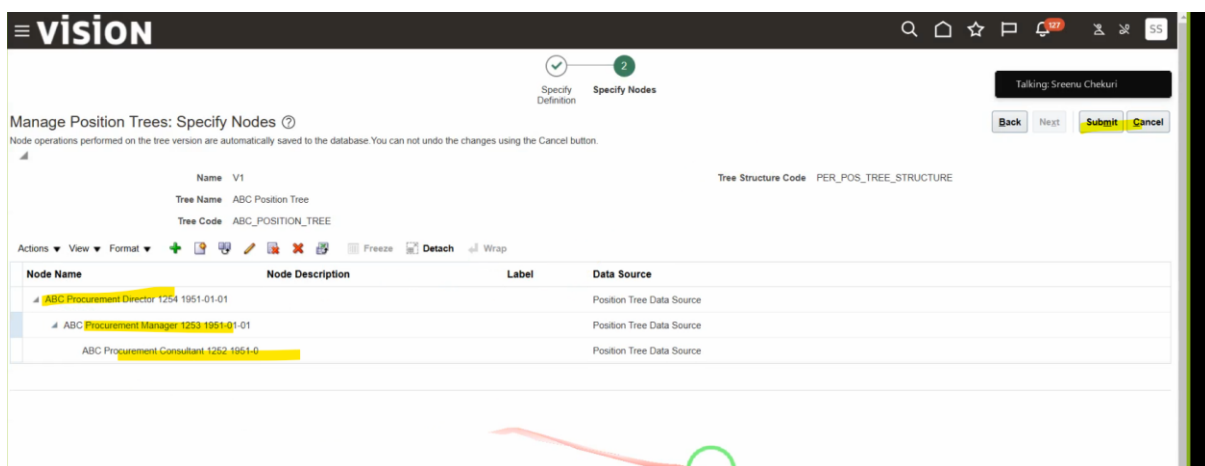


Like that we will another consultant also as shown above. And submit it.

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

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

Then



Click on online Audit

Audit completed successfully.
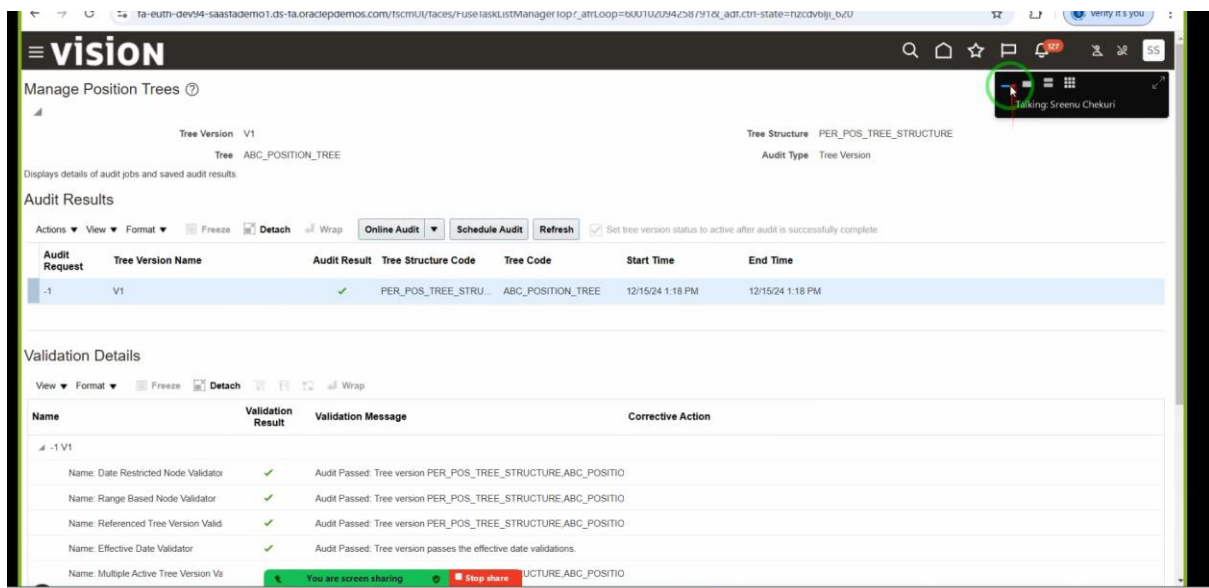


Click on Done

Now the tree is active
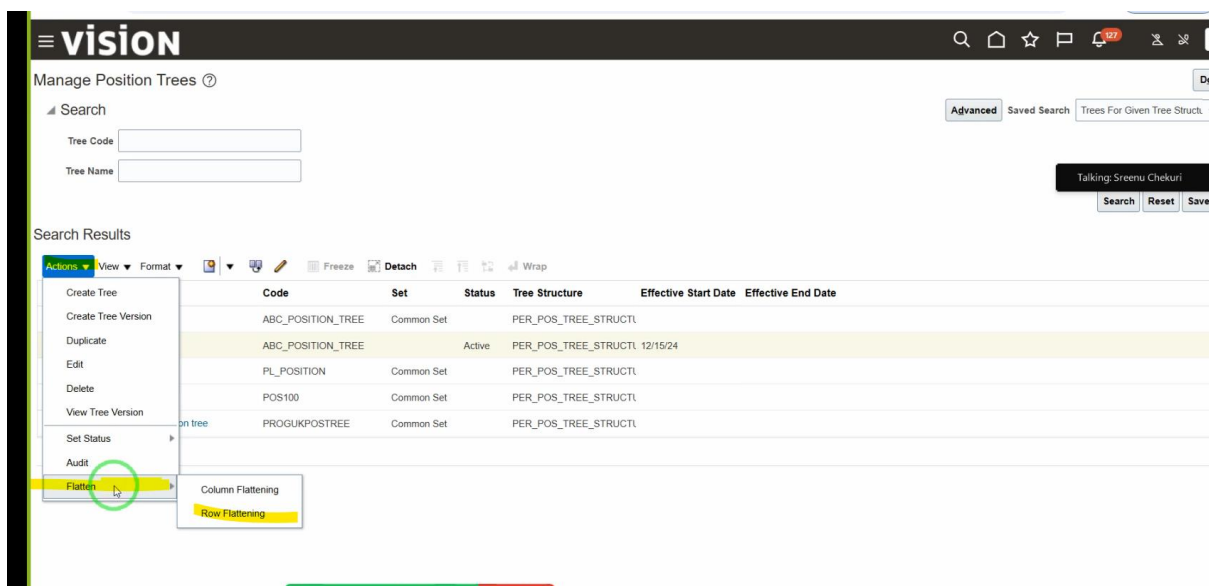
Select the line, Goto Actions> Flattern > Row Flattering (you can select any / which will take rowwise/column wise structure)
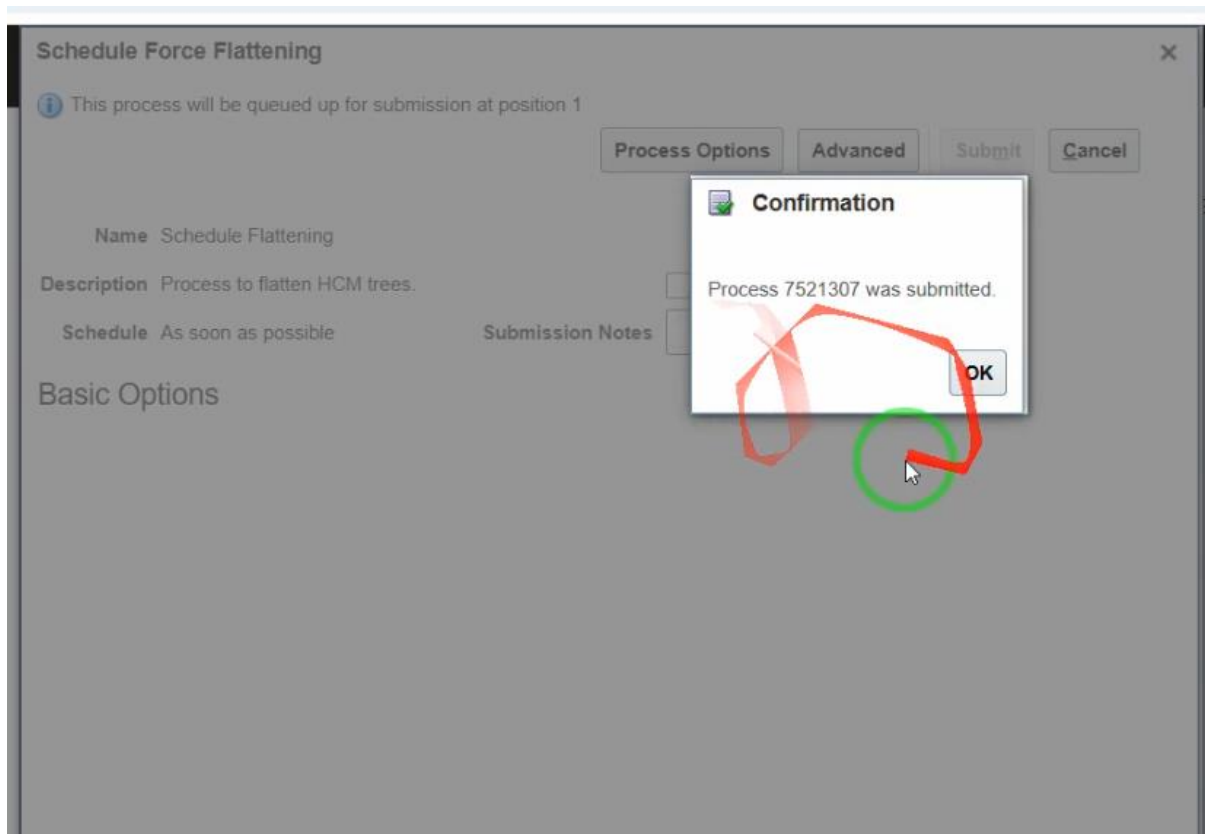




Done

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.
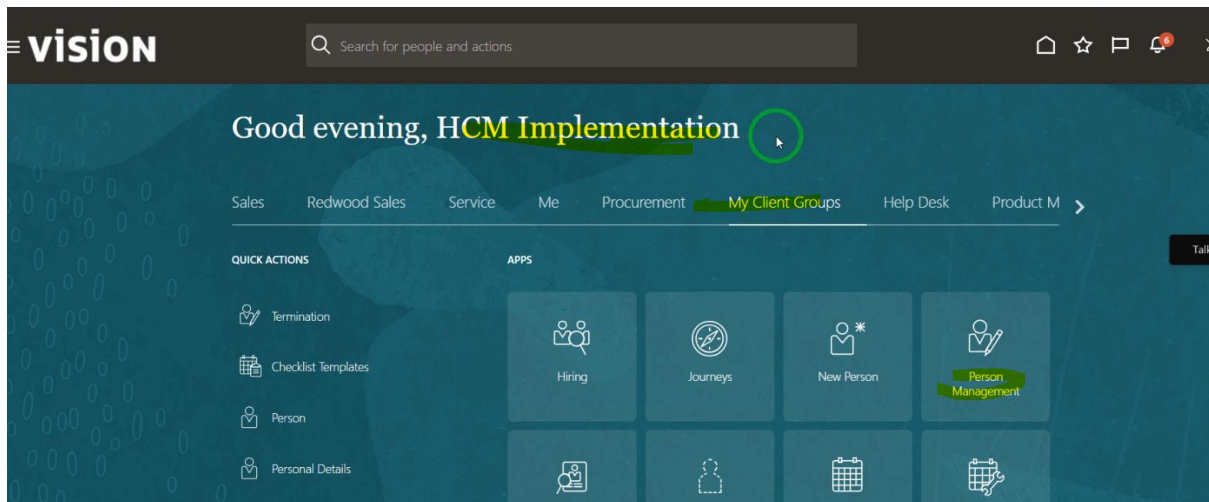
My client Groups> Person Management

Update the positions to the employees
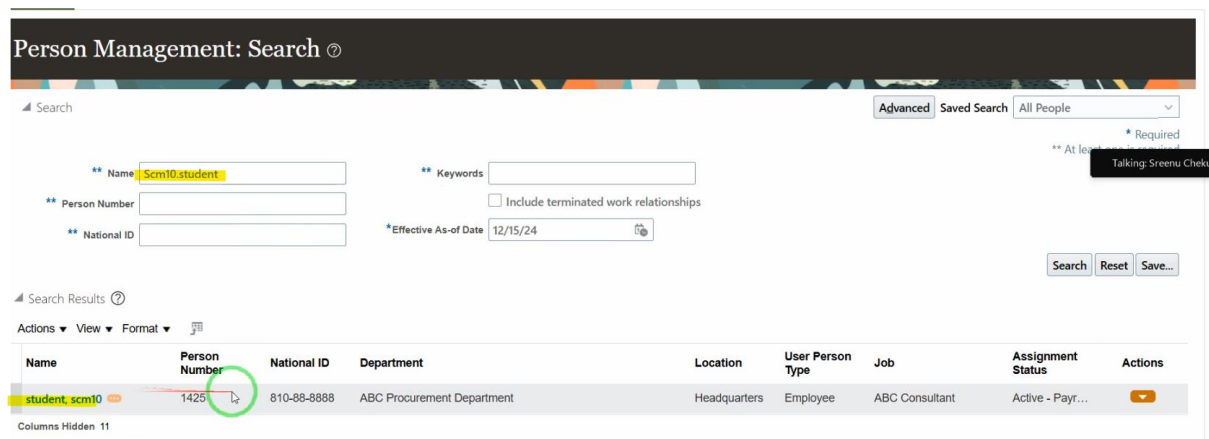


Search with employee

Click on employee
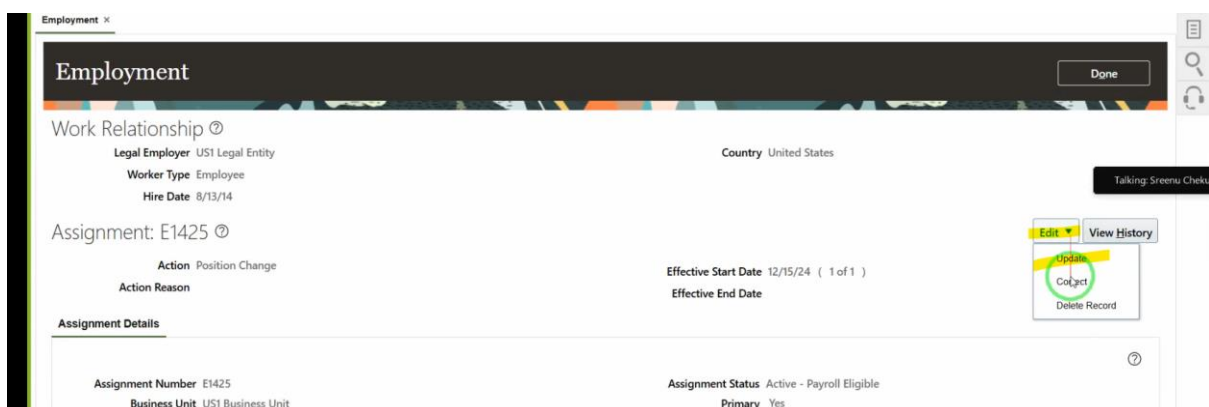
Enter the reason for update.



Save, review later submit, repeat for other two employees





Save, review and submit

Save, review and submit

Assigned to all the employees. It's done

Step 4: Crete the approval rules with position hierarchy

Goto Requisitions approvals>
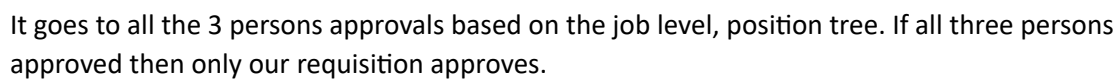
Change the actions> route using position hierarchy

Save, deploy it

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

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

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.

Sreenivasulu Chekuri

Requisition approved.