Oracle HRMS Position Control – Do You Really Have Control?

By Debra Addeo

Editor's Note: When Oracle HRMS first came into vogue, the challenge most companies faced was which was the better choice for their business: job or position management? Complexing the matter was developing meaningful organization hierarchies. Fortunately those times are all but forgotten, and position management has demonstrated its power as a useful tool for tracking FTE within budgetary controls. ORAtips contributor Debra Addeo presents an overview of using position control for dollar and FTE tracking, highlighting the necessity for customizations to truly realize gains from this mature but still limited module function.

Introduction

This article will focus on Oracle Human Resource's position control functionality and examine the issues with controlling positions both on the monetary side and the number of positions. Before using position control, Microsoft Excel spreadsheets were used to control the number of positions and stay within the budget.

Position Control is a module within Oracle Human Resources (HR) and can be used with or without the budget module. This article will not go into the budget side of position control. The implementing of budget with position control will be another article, coming soon to ORAtips.

When someone wants to control the number of positions, they need to decide if they want to control dollars or FTE (full time equivalents, a.k.a. people). The article will also look at customizations to the Position Control module that will assist in getting control.

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Components Overview

As stated in the introduction, the Position Control module is part of the Oracle HR module. Organizations need to be defined in order to use position control. An organization hierarchy is representative of an organization chart. Not all organizations in the organization hierarchy have to be position controlled; only the ones that are marked for it are controlled. Once the organizations are defined, then roles and rules for the workflow are configured to allow approval of the positions.

Position Control uses the position transaction screens to create positions and to forward them along a routing list to different people or groups for approval. Positions need to be set up so that each name is unique and each position only belongs to one organization. Furthermore, each position belongs to one organization and one job. The preceding description is a fifty thousand-foot level description of position control.

Position Control Setup
Organizations

Once all organizations are defined, they can be placed into a hierarchy using the Organization Hierarchy screen (Figure 1). There is a checkbox in this screen that allows the top-level node to be position controll enabled. Once the checkbox is checked, then position control can be used. In the Subordinates area of the screen, there is also a field to enable only specific organizations. When an organization is added to the hierarchy, the position control enabled is defaulted to no. If the organization needs to be position control enabled and it is not changed to Yes or NULL, then that position will not be part of position control.

This is a small thing but can cause quite a few problems if not carefully watched. When an organization is not position control enabled, then anyone with the correct privileges can go into the position description and change a position without having to go through the workflow to get the position change approved.

When the organization is position control enabled, the APIs that are related to a position may not function. An error may be returned from the API that states that the function is no longer valid with position control enabled. Disabling position control and running the API is an option to circumvent this problem.
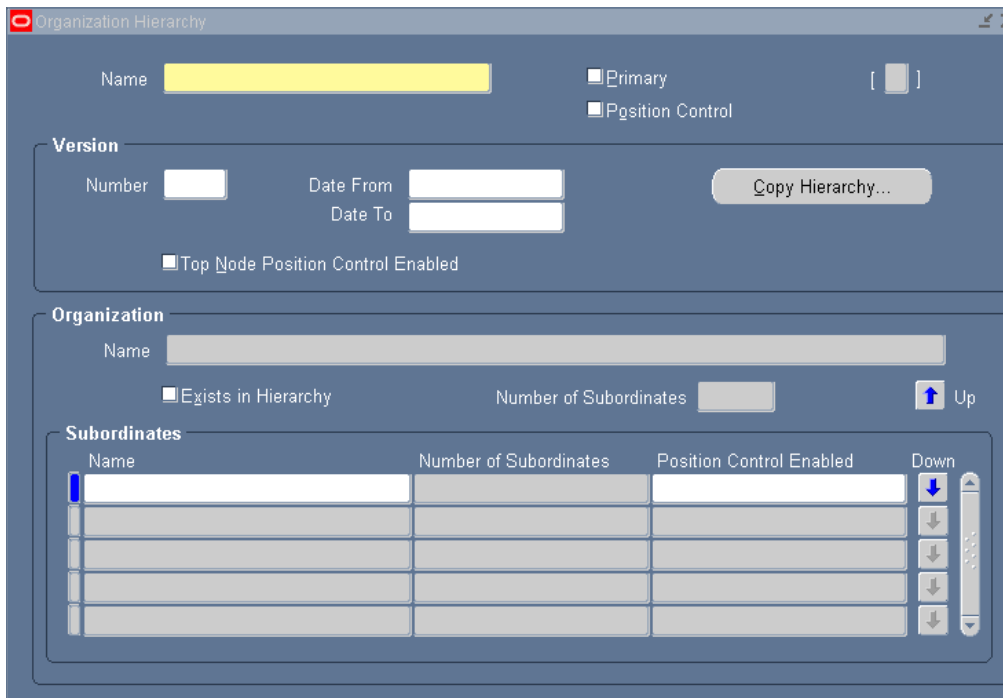
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Figure 1: Organization Hierarchy Screen

Workflow

The workflow for position control is set up under the Transaction Maintenance menu. Starting with the Roles screen (Figure 2), the roles are defined using any names that would seem appropriate to an organization. After you define each role, you must assign users to each role and then enable each role. A user can have more than one role at a time, but only one role can be the default role for that user.

The user cannot use the position transaction screen until it is placed into one of the defined roles. Once you set up the roles, then you must place them into a routing list using the Routing Lists screen (Figure 3) or using the transaction wizard. The routing list shows how a position is routed and who can
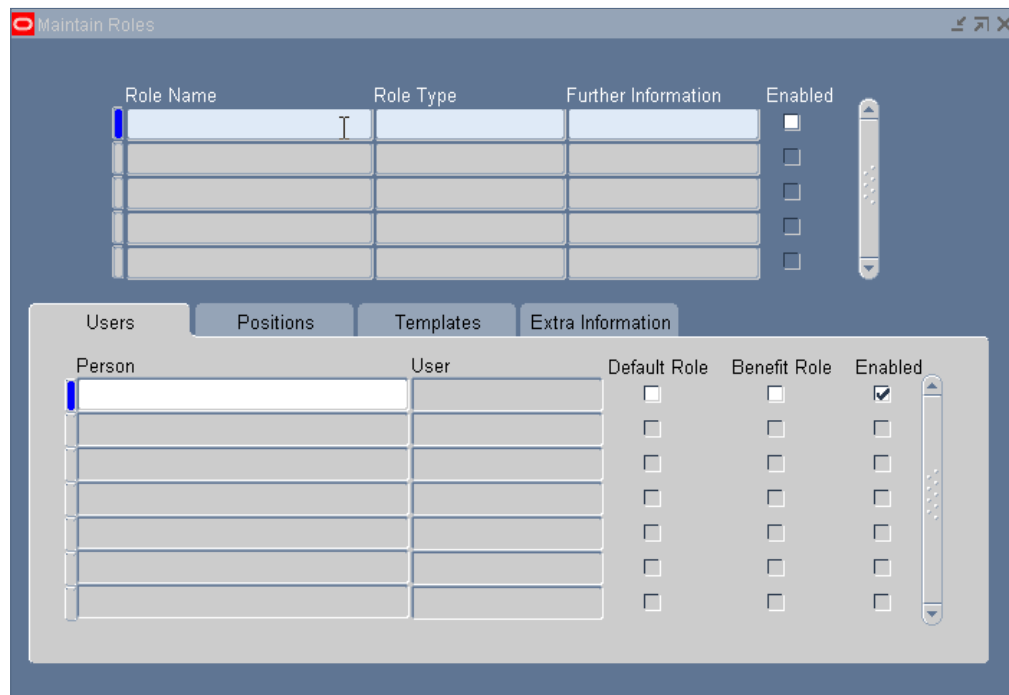

Figure 2: Roles

approve a position. Once a position is approved, it is removed from the routing list. It is important to think about who can do a final approval of a position and who can do an inter-

mediate approval of a position. This can be confusing so here is a basic example of what is meant by intermediate approval.
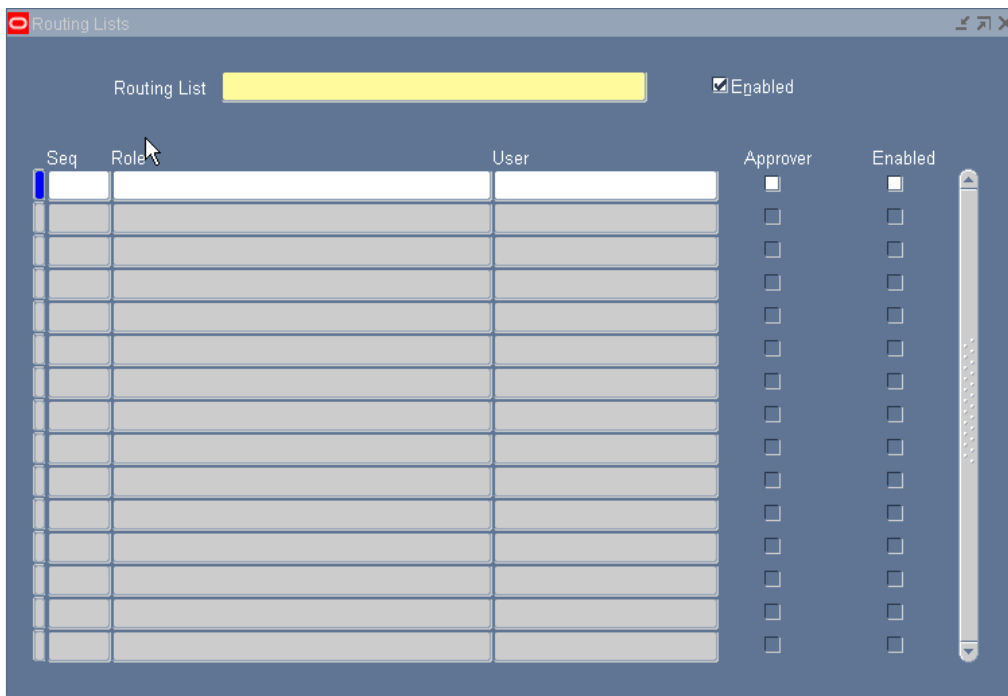
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Figure 3: Routing List

If there is a position that the HR department needs to approve but the budget department needs to have final approval because it needs to check the budget numbers before giving final approval, the position can be routed from the requestor to HR. HR can then look at the position to see if it should be approved from an HR perspective, but they do not know how much money is in the budget. HR would not approve the position but would send the position on to the budget department for approval.

The budget department would be responsible for the amount of money spent by the organization. If there is a position that did not need budget department approval, the HR department could approve the position and not forward the position on to budget for approval. Once the position is approved, it is saved to the database as an actual position and removed from the routing.

What if certain positions and certain jobs needed to be approved by one person and other positions need-

ed to be approved by someone else? This can be accomplished using the Transaction Type Wizard (Figure 4). The Transaction Type Wizard allows the setup of transaction type to be grouped and routed for approval in the same manner. This wizard would be used to designate approvers and the routing of positions. It would also determine when the routing notifications expired. If a routing notification expires, then the requestor would need to resend the request. There needs to be a fine balance between having a request timeout too soon because someone was on vacation and having it sit too long in an approvers in box and not be processed.

To check the status of a transaction, the Transaction Status screen (Figure 5) is used. The Transaction Status screen displays the name of the transaction, its status, and current owner. In the second part of the screen, it shows the routing history so anyone can check to see whom the position was forwarded from to ensure that everyone who needed to review the position has.

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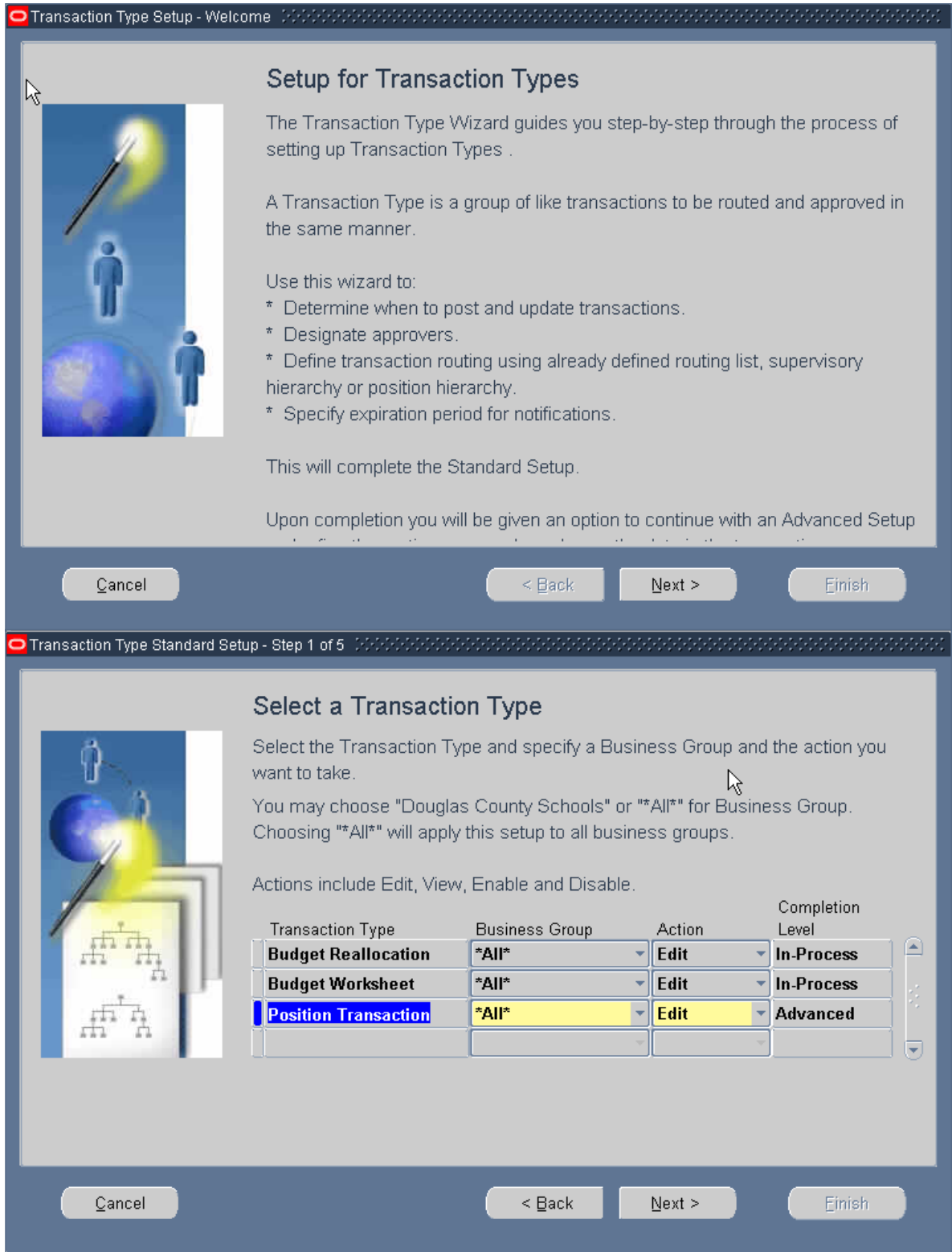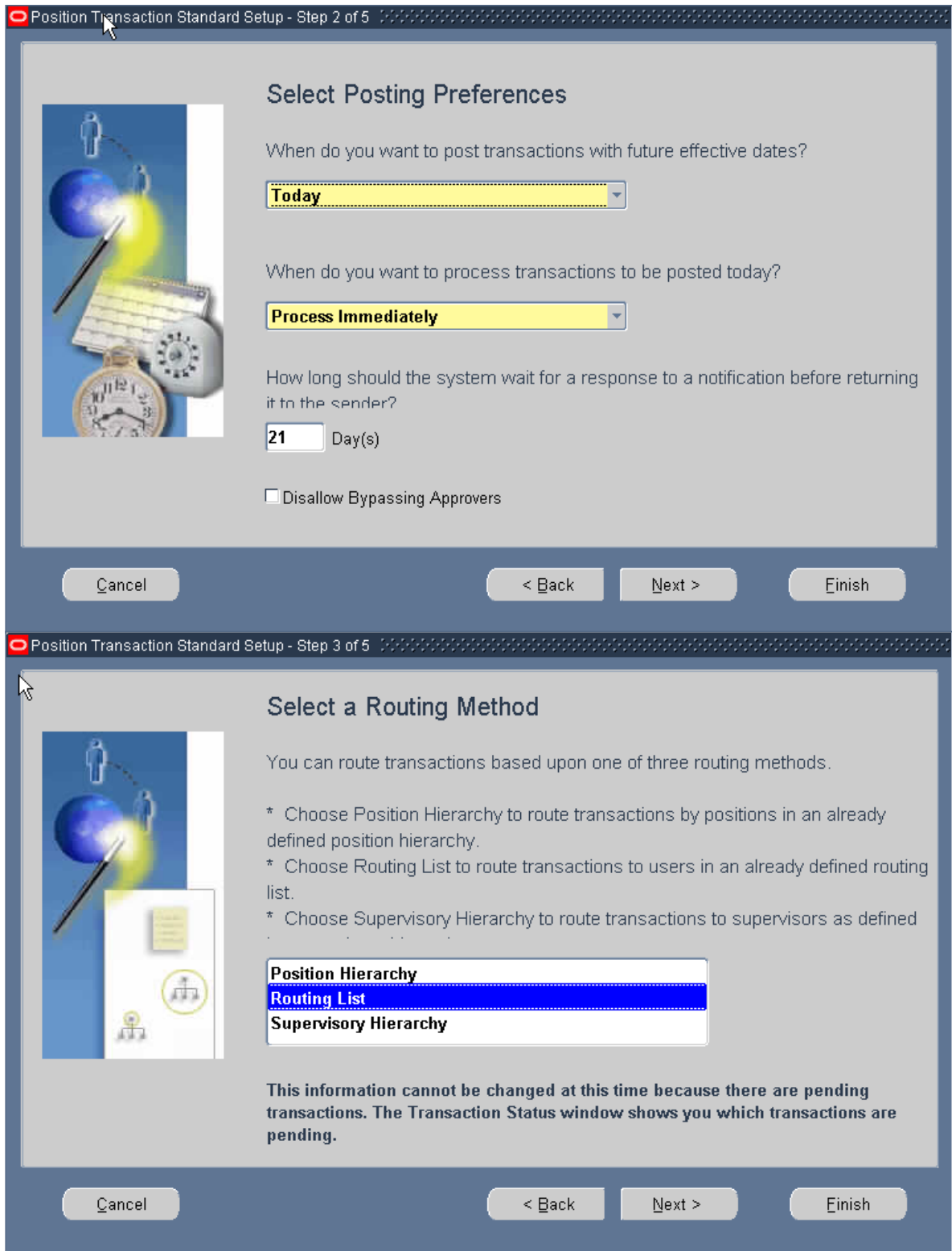
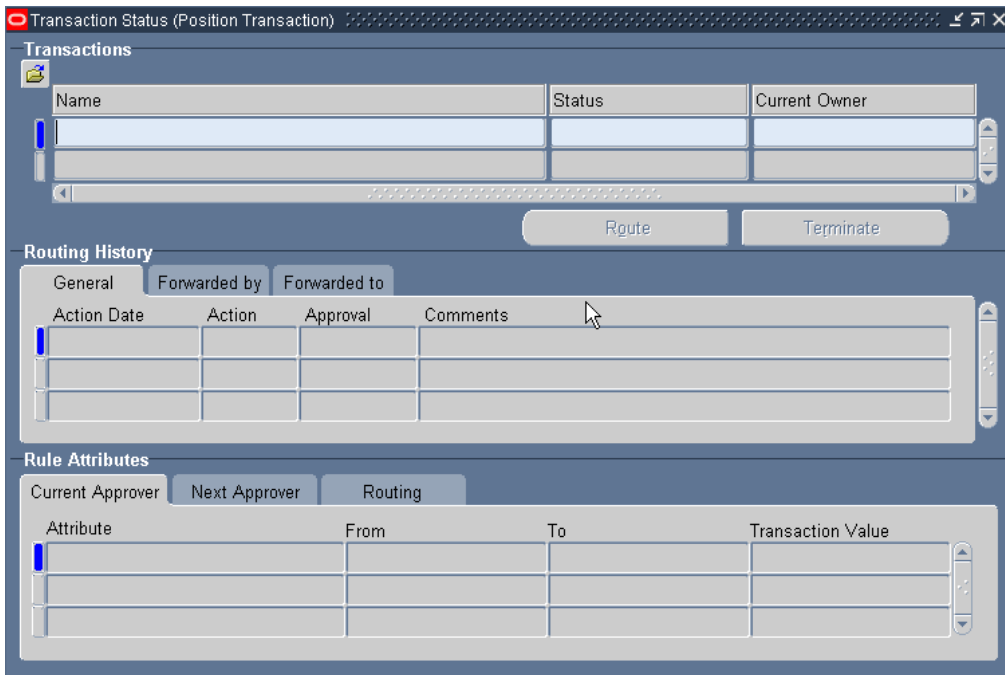Figure 4: Transaction Wizard

Figure 4: Transaction Wizard continued

Figure 5: Transaction Status

on the Position Transaction form. Both types of required fields must be filled in before the user can save the information.

The template permits setting the fields to view only or allows for editing. You must be careful here because if someone sets a required field to view and does not allow edit, then a position can not be entered into the system. There do not seem to be any checks on this at the template level, but an error is quickly discovered when a position is put into the system.

Getting the workflow and the timeouts correct the first time may not happen, but may be a process of trial and error to see what works best for a company. Depending on how large the company is and the relationship between the requestors and the approvers, it is very important to make this work. The trust between the approvers is also important if there are multiple approval points within the process.

Templates

Another item in the setup is what information needs to be mandatory within the Position Transaction screens. Oracle provides a setup screen under transaction maintenance called Templates that will allow items from the Position Transaction screen to be made required, viewable, and editable (Figure 6). These

can be customized to allow for items to be mandatory and optional. The mandatory items for the form show up as blue in blue on the Position Transaction screen and the required items from this template show up as yellow
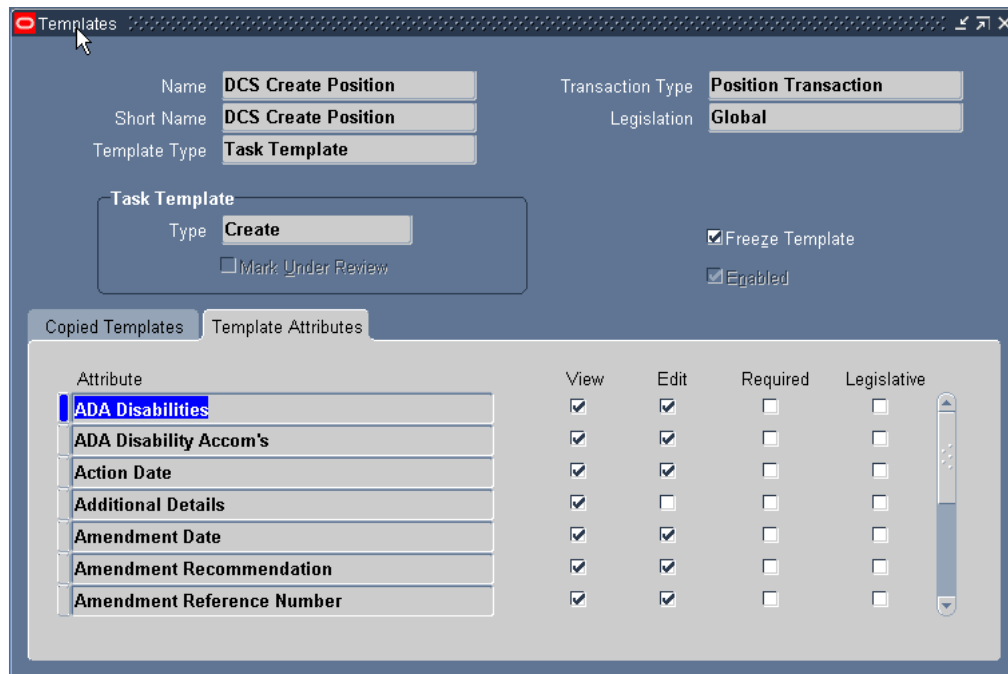
Configurable Business Rules

The Oracle HR (position) module allows business rules to be configured and put into action (Figure 7). The rules for position control were from the Assignment Modification category. The assignment hire date was specified using an existing rule that

Figure 6: Position Template

states a person cannot be hired into a position before the hire date of the position. If this were to happen, users would get an error message letting them know that this was not acceptable and that the hire date would need to be changed before the person could be put into the position.

Position Control Process

Positions that are position control enabled need to be filled in using the Position Transaction screen. The position description screen then becomes a read only screen. After the position information is filled in and the Save button is pressed, the requestor has the option to forward the position for approval. The requestor does not have to forward the position to the next person in the approval routing list; it can be forwarded to anyone in the routing list.

The person making the final approval of the position needs to be aware of the intermediate approvals that are required with each type of position and must manually check to see that they have been completed before approving the position. The transaction flow from the Transaction Status screen can give the approver that information. If the approver does not look at the transaction flow, then there is nothing to stop the position from being approved, even if it did not stop at all of the approvers. The person who

Figure 7: Configurable Business Rules

Figure 8: Assignment Others Budgets

approves the position removes the position from the routing list. For a position to be available to be placed on an assignment, the position must be approved, applied, and active.

When a position is placed on an assignment, the budgets screen needs to be filled out with the correct FTE for the assignment (Figure 8). If there is someone in a position or the FTE filled in for this screen is greater than the FTE on the position, an error will result. There is nothing that prevents users from putting a zero in this screen and using any position they want. The system calculates the FTE amount in the position and the amount of FTE added for this new person to be put into this position,
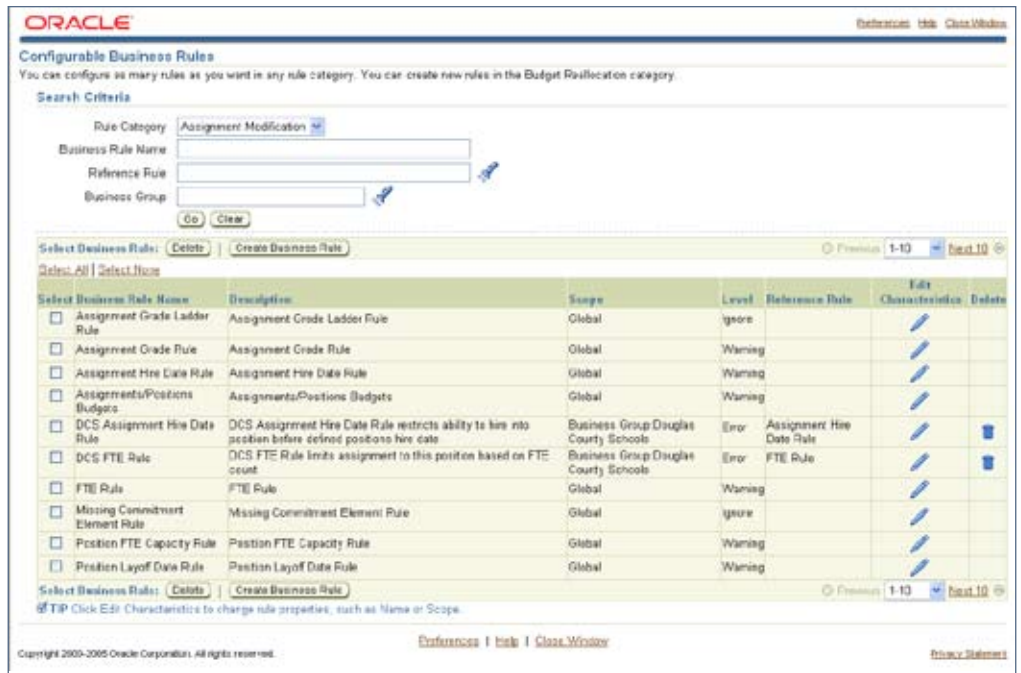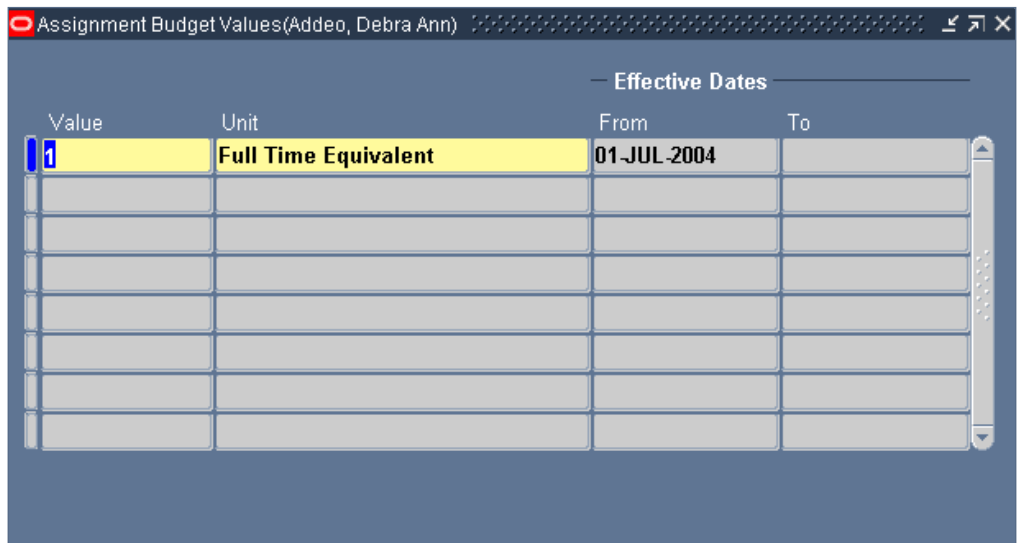
and if there is no FTE after the calculation based on the others budget screen, then the error displays. If there are multiple people in the same position and you need to find out who is in a position, navigate to the position description screen, query the position, and then click the "others" button to go to the occupancy screen (Figure 9). It will show who is in the position.

Part of the position control process allows for positions to be overlapped (Figure 10). Overlapped positions happen when more than one person shares a position for a given period of time. A good example of this would be when someone hires a temporary person for another person on maternity leave. The system does not check for a specific number of people and therefore allows the user, who is inputting the data, to put in an infinite number of FTE into the position when two people are allowed in a position. Caution: approvers need to be careful when approving an overlap position.

Missing Information

Now that the setup is completed and the process is in place, you notice the numbers are missing. There is no place to input the amount of money or the number of positions that an organization is allowed to have. To fix this, a flexfield can be attached to the organization to enter the missing

information for FTE or money. However, once this information is entered into the flexfield, there is no way to check if the position is within the boundaries set for the organization. Consequently customizations are required to proceed.

Customizations

Adding flexfield information stores the information but does not actively allow the use of it in the approval process to gage how an organization is doing. The numbers to store for an organization may be the dollar amount of what an organization
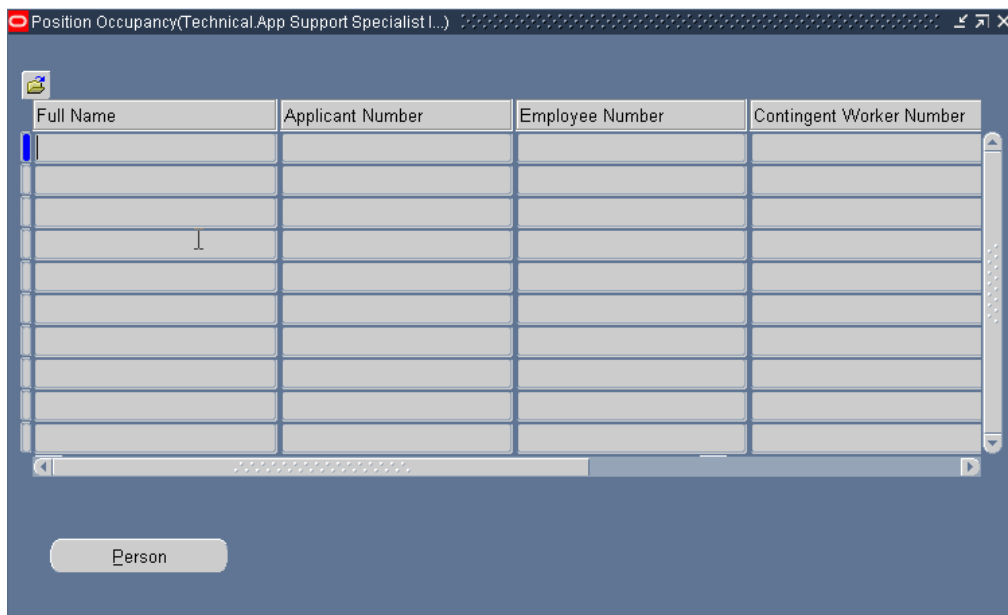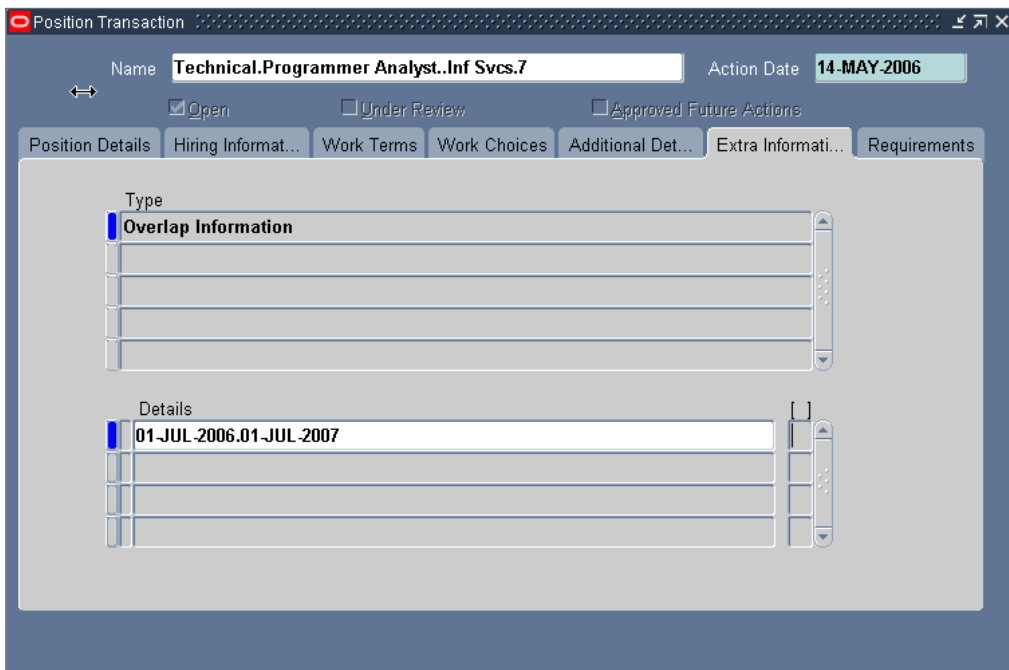

Figure 9: Position Others Occupancy

Figure 10: Overlapped Position

can spend on FTE. It may also be the number of FTE. This is where business rules would dictate what information should be kept to help the decision making process. Information in the flexfields is not helpful unless there are custom reports that assist with the interpretation of the information.

> *Without customizations, control is left up to the approver to obtain the information needed to make an informed decision.*

Reports, reports, and more reports are needed to assist the users with the decision making process of approving a position. The reports can be anything from a staffing report that shows dollar amounts, FTE, and vacant positions, to reports that show the users what positions are vacant so that they do not create positions when they already have one that is available. You also need reports that help the decision making process give the approver information to say yes or no on approval of a position.

If an approver is looking at a list of positions to approve, a report is needed to show all of the positions in the queue. For example, if the organization requests three positions but only has money for two of them, the report can let the approver know that all of the positions in the queue can not be approved, and, depending on which one they approve, they may or may not have money for the other positions. The report may need to be run multiple times to assist with these choices.

If customizations are not put into place, then the control is left up to the approver and other methods to obtain the information that they need to make an informed decision.

Conclusion

If the number of positions, FTE, or dollar amounts for positions at a company are calculated in another module or system and the approver can easily access that information to make an informed decision, then this module works very well.

If the user does not have access to another system to get information easily to make an informed decision, then this module can still work well with customizations.

If Oracle would make an enhancement to this module, that is, if they would add a dollar amount or number of FTE to be controlled to the Organization Hierarchy screen, check that number, and then issue appropriate warnings before allowing the position to be applied and approved, it would make a huge difference in the usability of this module.

The addition of the budgeting module may or may not assist with some of the missing information, but that topic will need to be explored in another article.

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