

Oracle Fusion Cloud Human Resources

How do I set up position budgeting?



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1 Overview

Overview of Position Budgeting

Position Budgeting helps to capture the budgetary values and to enforce them while creating or updating budgets for positions. You can define a budgetary period and measure your activity against these budgetary values.

You can define the position budget for full-time equivalent (FTE), Headcount, and Budget Amount at these levels in an enterprise:

- Business Unit
- Department
- Location
- A combination of any two or all three of the above

A position budget table, budget configuration options, and a mechanism to load and store position budgets using HDL is provided. You can use this budget information to alert the users when they exceed the position budget. You can load budget definitions by using the PositionBudget.dat file in HDL. Once the budget data is loaded in the application, the validations for FTE, headcount, and budget amount take effect when a position is created or updated.

The budget values that you load in the budget table are applicable for a specified set of budget allocation criteria. These budget values are cumulative, and they include the total budget values across all positions that match the budget allocation criteria defined at the enterprise level. This overall budget can be utilized by a single position or multiple positions. The budget allocation criteria can be business unit, department, location, or a combination of these three.

2 Before You Start

Before You Start

You need to complete these steps before you start setting up position budgeting:

1. Set the `ORA_PER_POSITION_BUDGETING_ENABLED` profile option to **Y** to enable position budgeting.
2. Add the **Position Budgeting Configuration** extensible flexfield context to the **Associated Context and Pages** section as follows:
 - a. Navigate to the Setup and Maintenance work area.
 - b. Search for and click the **Manage Extensible Flexfields** task.
 - c. Search for and edit the **Organization Information EFF** flexfield.
 - d. On the Edit Extensible Flexfield: Organization Information EFF page, in the Category section, expand **Organization**.
 - e. Select **Enterprise** and scroll down to the Enterprise Details section.
 - f. On the Associated Contexts tab, click **Select and Add**.
 - g. In the **Select and Add: Contexts** dialog box, search for and select **Position Budgeting Configuration**.
 - h. Click **Apply**.
 - i. On the Pages tab, in the Enterprise Details: Associated Contexts Details section, click **Select and Add**.
 - j. In the **Select and Add: Contexts** dialog box, search for and select **Position Budgeting Configuration**.
 - k. Click **Apply**.
 - l. Click **Save and Close**.
 - m. Redeploy the flexfield.

3 Set Up Position Budgeting

Configure Position Budgeting

Before you start defining position budgets, you need to configure the following position budgeting settings on the Manage Enterprise Information page.

Attribute	What you need to do	What happens when you configure this attribute	Example behavior
Allocate By	Select your budget level as Business Unit, Department, Location, or a combination of these attributes. For example: <ul style="list-style-type: none"> Business Unit and Department Business Unit, Department, and Location 	Whenever you define position budgets, you must ensure that the definition adheres to the Allocate By values that have been specified at the enterprise level.	Let's say Allocate By has been selected as Business Unit and Department at the enterprise level. But in the budget table, the data is loaded using only the Business Unit. A validation is done during the HDL load to check whether there's a mismatch between what was selected at the enterprise level and what's being loaded in HDL.
Budget Amount Currency	Select the currency to use for Amount-based budgeting.	The currency in the budget section of a position will get defaulted to the currency selected at the enterprise level.	USD is defined as Budget Amount Currency on Enterprise. The currency on Position UI will also be defaulted as USD and the attribute is made as read-only.
Budget Period Start Day	Day of the month when the budget period starts.	This start day will be used to identify the Budget Period Start Date and the Budget Period End Date while loading the data.	Assuming that the Budget Period starts on April 1, the Budget Period Start Day will be 1 and the Budget Period Start Month will be April. That means the end date of the period is March 31.
Budget Period Start Month	Month of the year when the budget period starts.	This start month will be used to identify the Budget Period Start Date and the Budget Period End Date while loading the data.	Assuming that the Budget Period starts on April 1, the Budget Period Start Day will be 1 and the Budget Period Start Month will be April. That means the end date of the period is March 31.
Convey FTE Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.
Convey Headcount Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.

Attribute	What you need to do	What happens when you configure this attribute	Example behavior
Convey Amount Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.

Position Budget Checks Performed at the Position and Worker Assignment Levels

This table shows what happens at the position and worker assignment levels when a position budget isn't configured on the Enterprise HCM Information page.

When Position Budgeting Isn't Configured

Level	Outcome
Position	Outcome: No budget checks are performed for the FTE, Headcount, and Budget Amount attributes, and their limits aren't validated.
Worker Assignment	<p>Use Case 1: The Apply Incumbent Validation checkbox is deselected on the Enterprise HCM Information page. Outcome: No validation of FTE and Headcount is performed at the worker assignment level.</p> <p>Use Case 2: The Apply Incumbent Validation checkbox is selected on the Enterprise HCM Information page. Outcome: Here's how the FTE and Headcount of the position on the worker assignment are checked:</p> <ul style="list-style-type: none"> If overlap of headcount is allowed for the position associated with the assignment: Warning is displayed if the open FTE or Headcount is exceeded. If overlap of headcount isn't allowed for the position associated with the assignment: Users need to select a different position that has unutilized FTE or Headcount.

This table shows the position budget checks at the position and worker assignment levels after you configure the position budgets on the Enterprise HCM Information page.

Note: You must set the **ORA_PER_POSITION_BUDGETING_ENABLED** profile option to Y to enable position budgeting.

When Position Budgeting Is Configured

Level	Action or Outcome
Enterprise HCM Information	Configure the values in the Position budgeting section.
HCM Data Loader	Load the budget data using the PositionBudget.dat file.
Position	Errors and warnings are displayed based on the position budget validation in these flows: <ul style="list-style-type: none">• Request a New Position• Request a Position Change• Add Position• Update Position
Worker Assignment	<p>Use Case 1: The Apply Incumbent Validation checkbox is deselected on the Enterprise HCM Information page. Outcome: No validation of FTE and Headcount is performed at the worker assignment level.</p> <p>Use Case 2: The Apply Incumbent Validation checkbox is selected on the Enterprise HCM Information page. Outcome: Here's how the FTE and Headcount of the position on the worker assignment are checked:</p> <ul style="list-style-type: none">• If overlap of headcount is allowed for the position associated with the assignment: Warning is displayed if the open FTE or Headcount is exceeded.• If overlap of headcount isn't allowed for the position associated with the assignment: Users need to select a different position that has unutilized FTE or Headcount.

Tips for Configuring Position Budgeting

Here are some tips for configuring position budgeting:

- **Allocate By** on enterprise can't be changed if budget definitions already exist.
- When the ORA_PER_POSITION_BUDGETING_ENABLED profile option is set to **No**, you can't load the budget data using HDL.
- When the ORA_PER_POSITION_BUDGETING_ENABLED profile option is set to **Yes**, you can load the budget data using HDL only if budget data doesn't exist already for the provided budget period.
- A budget period is currently for one calendar year.
- Budgetary Year will be an input in the HDL file and will be used along with the Budget Period Start Day and Budget Period Start Month segments on the enterprise to identify and populate the Budget Period Start Date.
- Budget Period End Date is always one calendar year after the Budget Period Start Date.
- If you update your budget definition in between the budget period, then only the allocations can be modified.
- The current budget period's budget definition won't be rolled over automatically to the next calendar year.
- Budget definition data for a maximum of 2 budget periods can exist in the table at any given point in time - Past and Current, Current and Future, or only Current.
- If the budget table has data for 2 budget periods at a given point of time, then you need to delete the budget data for one period in order to load the third period's budget definitions.

- **Budget Amount Currency** on the position will be defaulted from the Budget Amount Currency specified at the enterprise level, and it won't be editable.
- If **Budgeted Position** is enabled on the position and **Allocate By** includes Location, then the **Location** field on the position will be required.
- For calculating the remaining budget values, only those active and budgeted positions will be considered, which have an approved hiring status or a frozen hiring status with at least 1 incumbent as of the budget period end date. While calculating the remaining balance, the position type isn't considered, irrespective of whether the type is Single, Shared, or Pooled.
- Validation will be applicable on all Redwood and responsive position pages.
- Validations and calculations of remaining allocations will take place only if a budget definition is present for the calendar year in which the current date falls.
- The **Remaining Budget**, **Remaining FTE**, and **Remaining Headcount** attributes are available only on the position details section of Redwood UIs.
- If the allocation for the next budget period is less than what you're already utilizing in the current budget period, then once the next budget period starts, you will start seeing the warnings or errors while creating or editing the positions. For example: In FY 2022-23, the allocation for FTE is 200 and you have utilized 150. In the next FY 2023-24, if the new allocation for FTE is 120, then the FTE will be over budget by 30. So, you will see warnings or errors while creating or editing positions.
- Approval notifications will always display the remaining balance percentage for the proposed changes of FTE, Headcount, or Budget Amount.
- Enterprise configuration related to budgeting is also migrated when you migrate your enterprise configuration using the Functional Setup Manager (FSM) export and import functionality.
- Position budget data isn't migrated using the export and import functionality in Functional Setup Manager (FSM).
- Database Items (DBI) and User Entities (UE) aren't yet available for position budget data.

4 Approval Rule

Approval Rule for Position Budgeting

You can create an approval rule to route the transaction for approval when any of the values exceed the budget. Use these attributes to create approval rules:

- FTE Over Budget Percentage
- Headcount Over Budget Percentage
- Amount Over Budget Percentage

For example, you can create an approval rule indicating that if the percentage is within a certain limit, route the approval notification to the regular approver, else route to different approvers.

The approval notification also displays the remaining position budget details for approvers to review before approving.

5 Examples of Position Budgeting

Example of Position Budget Definition

The following table shows an example of a budget definition.

Let's assume the following:

- The budget is being utilized for only 1 position.
- **Error** is selected for the **Convey Headcount Overshoot As** field in the enterprise configuration.
- **Warning** is selected for the **Convey FTE Overshoot As** and **Convey Amount Overshoot As** fields in the enterprise configuration.

Position Budget Definition

Business Unit	Department	Location	Allocated FTE: FTE allocated for the budgetary period. Sum of FTE of all applicable positions must not exceed this value.	Allocated Headcount: Headcount allocated for the budgetary period. Sum of headcount of all applicable positions must not exceed this value.	Allocated Amount: Amount allocated for the budgetary period. Sum of amount of all applicable positions must not exceed this value.
Vision Corporation Enterprise	Cardiology	Vision University	20	15	600,000
Vision Corporation Enterprise	Cardiology	Redwood Shores	10	10	400,000
Vision Corporation Enterprise	General Surgery	Redwood Shores	15	10	600,000

Examples Where Budget Is Utilized for a Single Position

In these examples, let's assume that the budget is being utilized for only 1 position with a combination that matches row 1 of the Budget Definition: Business Unit as Vision Corporation Enterprise, Department as Cardiology, and Location as Vision University.

When the user enters the FTE, Headcount, and Budget Amount for the position that they're creating, the remaining allocation for FTE, Headcount, and Budget Amount is calculated as follows:

Remaining Allocation = Allocated Value - Value Entered by User

Note: The amount by which a budget is exceeded is shown as a negative value in the corresponding **Remaining Allocation** field.

Example 1

This table shows the budget definition and user input for the first example.

Example 1 for Budget Definition and User Input for One Position

Parameter	FTE	Headcount	Budget Amount
Allocated Value	10	10	400,000
Value Entered by User	5	15	450,000
Remaining Allocation	5	-5	-50,000

An error message is displayed, indicating that the Headcount has exceeded the budget. That's because **Error** is selected for the **Convey Headcount Overshoot As** field in the enterprise configuration.

A warning message is displayed, indicating that the Budget Amount has exceeded the budget. That's because **Warning** is selected for the **Convey Amount Overshoot As** field in the enterprise configuration.

The Remaining FTE Allocation has a positive value, which means that it hasn't exceeded the budget.

Example 2

This table shows the budget definition and user input for the second example.

Example 2 for Budget Definition and User Input for One Position

Parameter	FTE	Headcount	Budget Amount
Allocated Value	10	10	400,000
Value Entered by User	20	10	390,000
Remaining Allocation	-10	0	10,000

A warning message is displayed, indicating that the FTE has exceeded the budget. That's because **Warning** is selected for the **Convey FTE Overshoot As** field in the enterprise configuration.

The Remaining Headcount Allocation value is 0 and the Remaining Budget Amount Allocation has a positive value, which means that they haven't exceeded the budget.

Example Where Budget Is Utilized for Multiple Positions

Let's assume that multiple positions exist for the combination of Business Unit, Department, and Location specified in row 1 of the Budget Definition table.

When a user enters the FTE, Headcount, and Budget Amount for the position they're creating, the remaining allocation is calculated by considering the cumulative utilization of the budget specified in the Budget Definition table.

In such cases, the remaining allocation for FTE, Headcount, and Budget Amount is calculated as follows:

Resulting Cumulative Value = Current Cumulative Utilized Value + Value Entered by User

Remaining Allocation = Allocated Value – Resulting Cumulative Value

This table shows an example.

Example of Budget Being Utilized for Multiple Positions

Parameter	FTE	Headcount	Budget Amount
Allocated Value	20	15	600,000
Current Cumulative Utilized Value	10	10	300,000
Value Entered by User	20	10	300,000
Resulting Cumulative Value	10 + 20 = 30	10 + 10 = 20	300,000 + 300,000 = 600,000
Remaining Allocation	20 – 30 = -10	15 – 20 = -5	600,000 – 600,000 = 0

An error message is displayed, indicating that the Headcount has exceeded the budget. That's because **Error** is selected for the **Convey Headcount Overshoot As** field in the enterprise configuration.

A warning message is displayed, indicating that the FTE has exceeded the budget. That's because **Warning** is selected for the **Convey FTE Overshoot As** field in the enterprise configuration.

The Remaining Budget Amount Allocation value is 0, which means that it hasn't exceeded the budget.

