

# Oracle Fusion Cloud Human Resources

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**How do I set up position budgeting?**



Oracle Fusion Cloud Human Resources  
How do I set up position budgeting?

G29347-03

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# Get Help

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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 any of these levels in an enterprise:

- Department
- Location
- Department and Location

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 department, location, or a combination of these two.





# 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.

## Security Requirements for Position Budgets

You can view and manage position budgets if you have the predefined or custom roles with these privileges.

Aggregate Privilege	Job Role
Manage Position Budgets (ORA_PER_MANAGE_POSITION_BUDGETS)	Human Resource Specialist
View Position Budgets (ORA_PER_VIEW_POSITION_BUDGETS)	Human Resource Analyst



# 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 Enterprise HCM Information page.

Attribute	What you need to do	What happens when you configure this attribute	Example behavior
Allocate By	Select your budget level as any of the following: <ul style="list-style-type: none"> <li>Department</li> <li>Location</li> <li>Department and Location</li> </ul>	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 Location and Department at the enterprise level. But in the budget table, the data is loaded using only the Department. 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.

#### Related Topics

- [How do I change the Allocate By options in the position budgeting configuration on the enterprise?](#)

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

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	<p>Errors and warnings are displayed based on the position budget validation in these flows:</p> <ul style="list-style-type: none"> <li>Request a New Position</li> <li>Request a Position Change</li> <li>Add Position</li> <li>Update Position</li> </ul>
Worker Assignment	<p><b>Use Case 1:</b> The <b>Apply Incumbent Validation</b> checkbox is deselected on the Enterprise HCM Information page. <b>Outcome:</b> No validation of FTE and Headcount is performed at the worker assignment level.</p> <p><b>Use Case 2:</b> The <b>Apply Incumbent Validation</b> checkbox is selected on the Enterprise HCM Information page.</p> <p><b>Outcome:</b> Here's how the FTE and Headcount of the position on the worker assignment are checked:</p> <ul style="list-style-type: none"> <li>If overlap of headcount is allowed for the position associated with the assignment: Warning is displayed if the open FTE or Headcount is exceeded.</li> <li>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.</li> </ul>

## 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 Manage Position Budgets

## How You Manage Position Budgets

Use the Position Budgets page in Redwood to view, create, update, and delete position budgets. You no longer need to use HDL to perform these actions.

## View the Position Budgets for Your Enterprise

To view the position budgets for your enterprise:

- On the Home page, go to **My Client Groups > Workforce Structures**, and click **Position Budgets**.

The Position Budgets search page shows the position budgets for your enterprise.

Here's what you can do on this page:

- Search for a position budget by name or code.
- Filter the search results by effective date or by any of the parameters that you specify in the **Allocate By** field on the Enterprise HCM Information page: department, location, or department and location.
- Sort the results by name or code, or export them to a spreadsheet.

**Note:** Only the attribute that's selected under **Allocate By**, such as Location or Department, will be visible on the page. For example, if only Department is selected under **Allocate By**, then the other attribute of Location won't be shown on the page.

## Create a Position Budget

To create a position budget:

1. On the Position Budgets search page, click **+Add**.
2. In the **New Position Budget** panel drawer, specify the values in the fields as required and click **Submit**.

## Update a Position Budget

To update a position budget:

1. On the Position Budgets search page, click the link for the position budget that you want to update.
2. In the panel drawer, add additional data or modify existing data in the fields as required, and click **Submit**.

## Delete a Position Budget

To delete a position budget:

1. On the Position Budgets search page, click the link for the position budget that you want to delete.
2. In the panel drawer where the budget details are displayed, click **Delete**.

## Position Budget Search Results Depend on Roles

On the Position Budgets page, the search results displayed are based on your department data security profile.

Based on the organization security profiles associated with your roles, if you don't have access to certain departments, you won't be able to view the position budgets for those departments.

If you have only the **View Position Budgets** privilege and not the **Manage Position Budgets** privilege, then you won't be able to create and update position budgets. The **+Add** button and the link on the position budget name will be disabled for you.



# 5 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.



## 6 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

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.
Cardiology	Vision University	20	15	600,000
Cardiology	Redwood Shores	10	10	400,000
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 2 of the Budget Definition: Department as Cardiology and Location as Redwood Shores.

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 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.

