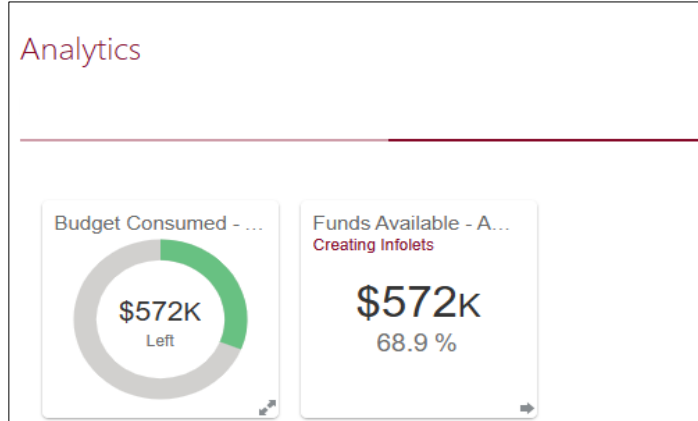


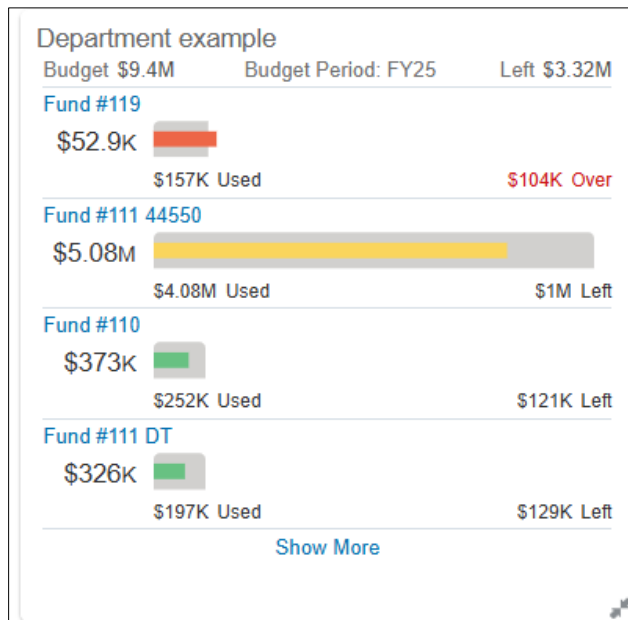
Creating Infolets on Oracle Cloud Budgetary Control Dashboard

After you have set-up a private dashboard(s) (Budget Account Group), you will be able to add “Infolets” to your Oracle Cloud home page. Infolets are budget snapshots that provide a quick summary of budget activity for your private dashboards. Below are two examples:

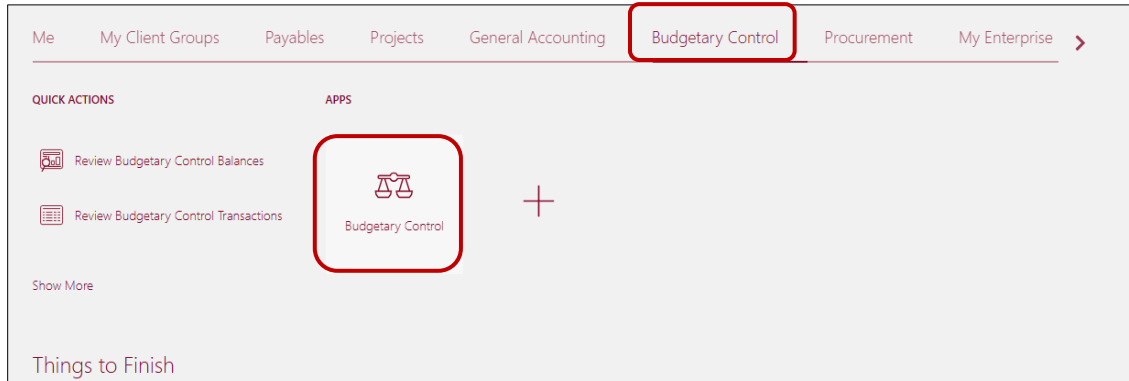
Example 1 -



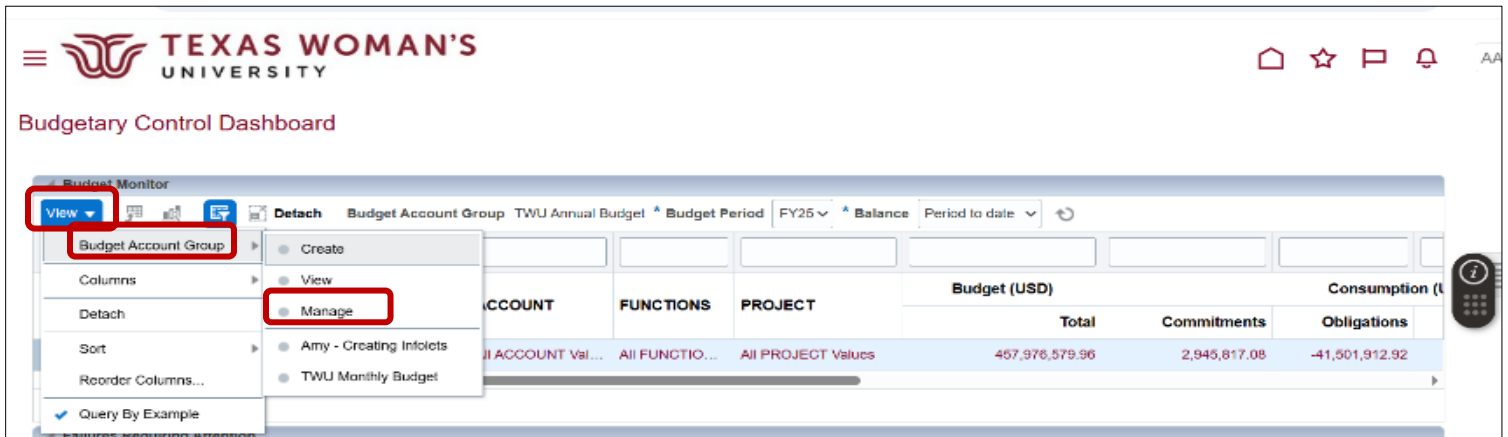
Example 2-



1. To set-up an Infolet, navigate to the Oracle Cloud Budgetary Control Dashboard.

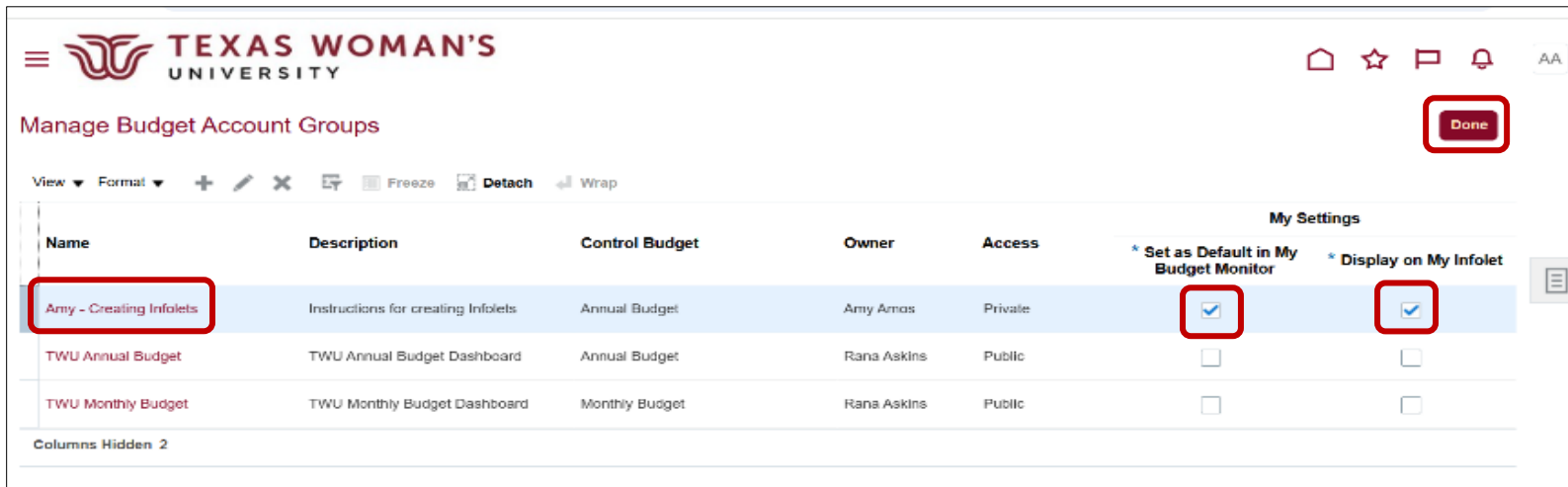


2. View, Budget Account Group, Manage

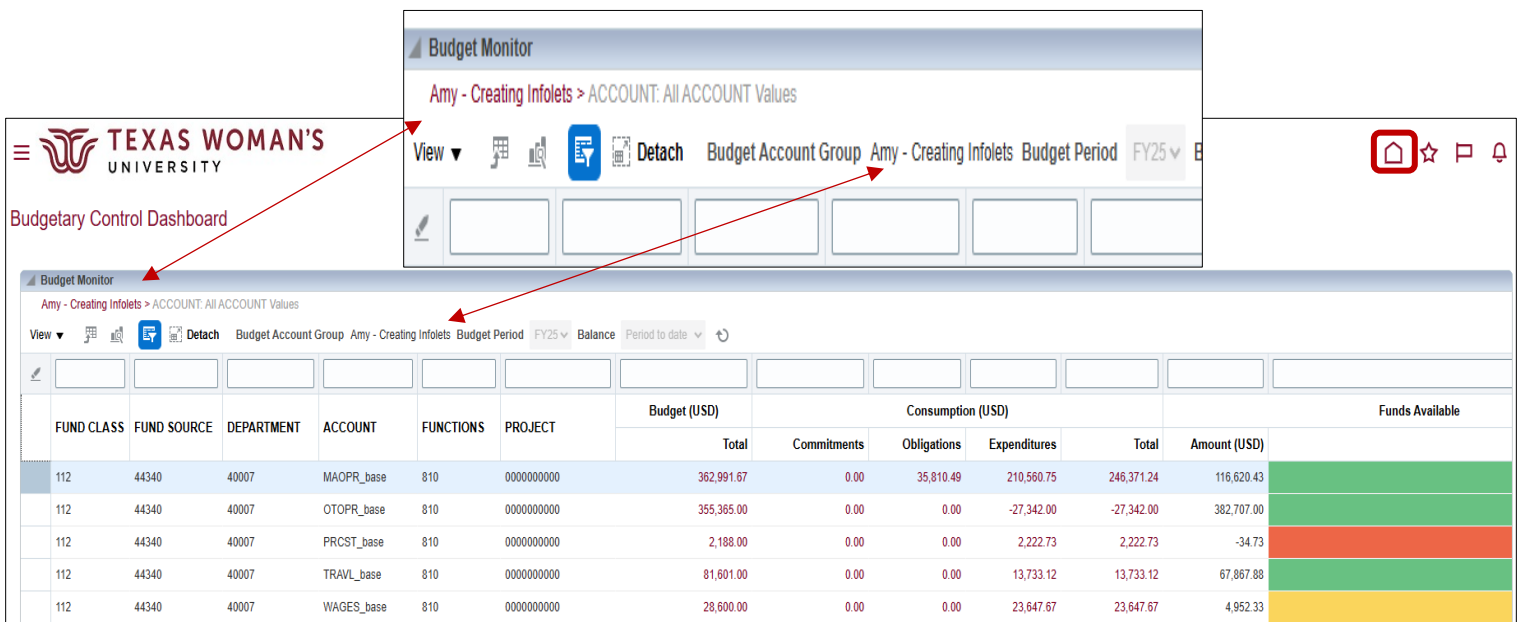


3. You will find a list of Budget Account Groups that are available for you to use for creating Infolets. Select up to 5 budgets by selecting "Display on My Infolet." For the purposes of our instructions, I will select just one, "Amy - Creating Infolets." Now select Done.

Note that I've also selected to use Amy - Creating Infolets for my "Set as Default in My Budget Monitor" which saves "Amy - Creating Infolets" as my dashboard budget account group. See #4 for more info.



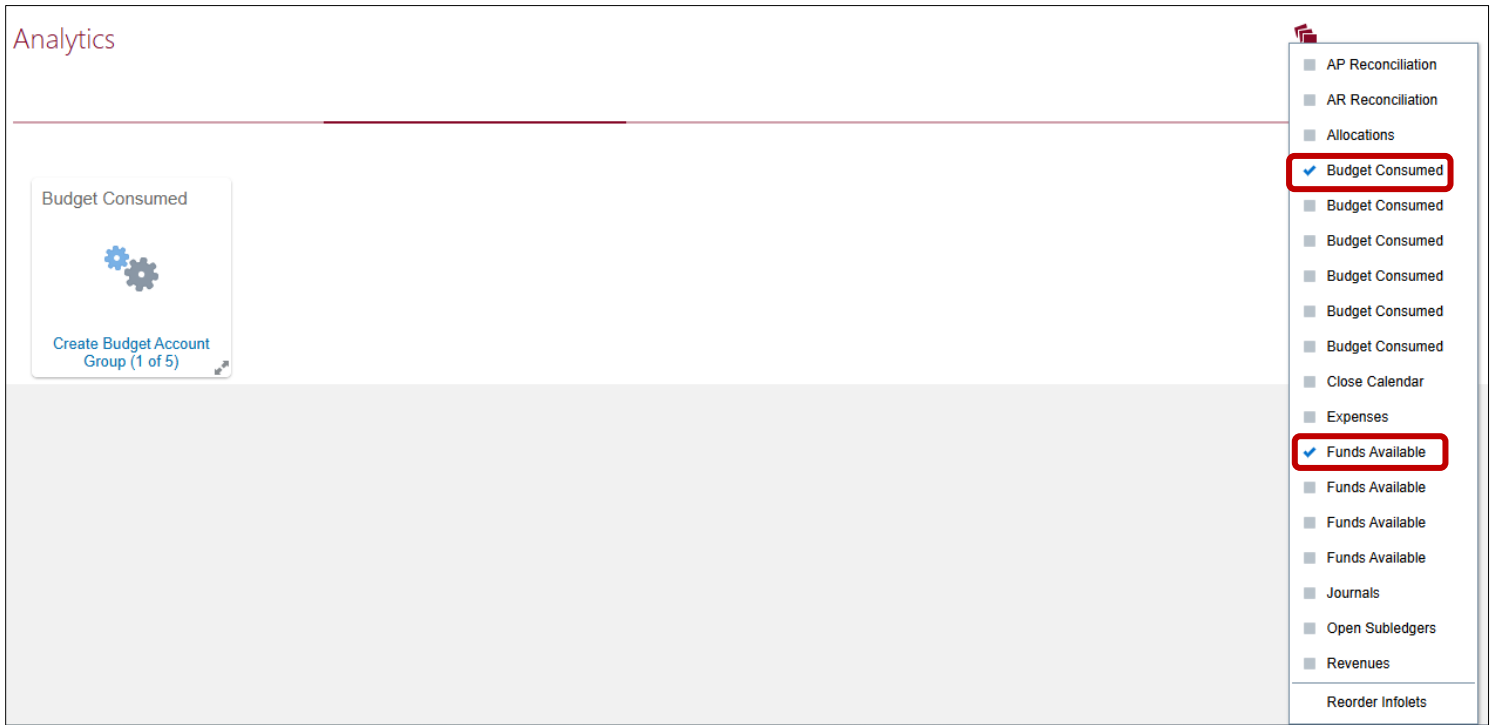
4. You will notice that my Dashboard now shows “Amy – Creating Infolets” as my Budget Account Group Default.
5. Click Home.



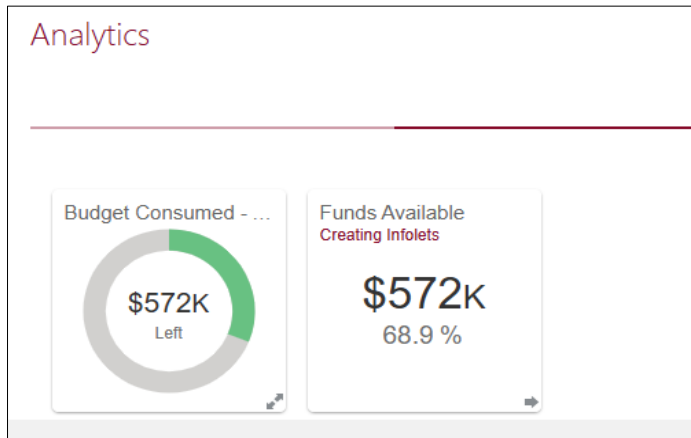
6. From the Oracle Cloud home page, scroll down to Analytics and select the “Infolet Repository” symbol.



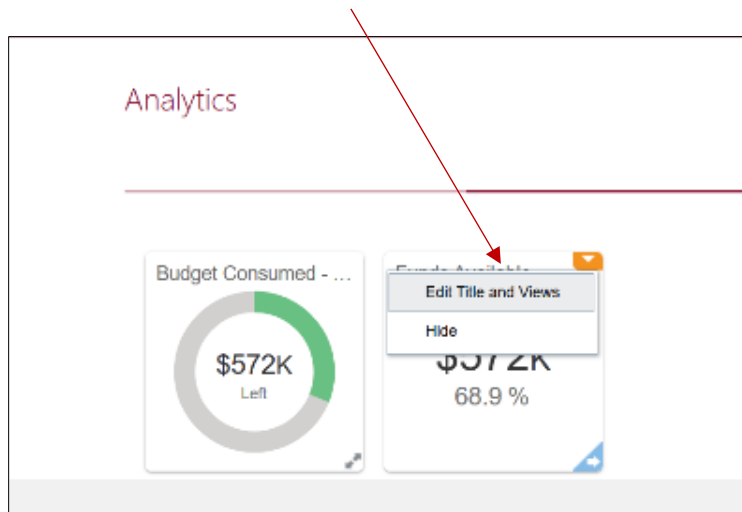
For our Infolet instructions we will select both “Budget Consumed” and “Funds Available.” They will all be checked initially. You will have to uncheck boxes one-by-one.



7. You will now see two Infolet boxes that you will update with your private Budget Account Group.



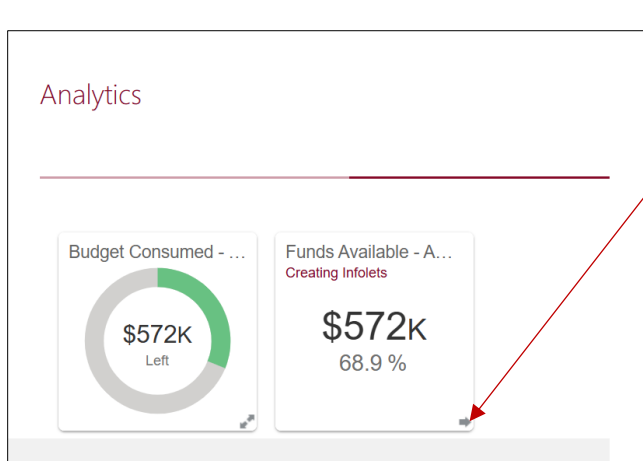
8. Let's start with Funds Available by selecting the orange down arrow in the upper right hand corner. Then select "Edit Title and View."



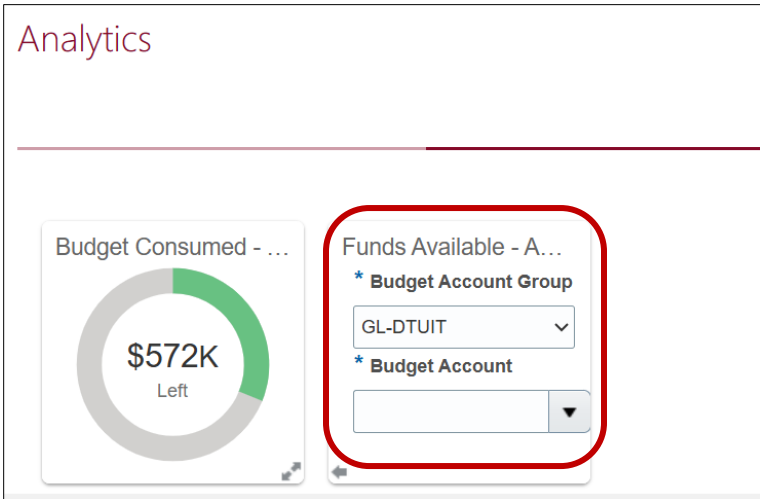
9. I recommend that you change the Infolet Title to include the name you created for your private dashboard. I named my dashboard, Amy – Creating Infolets, so I'm going to change the title from "Funds Available" to read "Funds Available – Amy Creating Infolets." Then select "Save and Close."



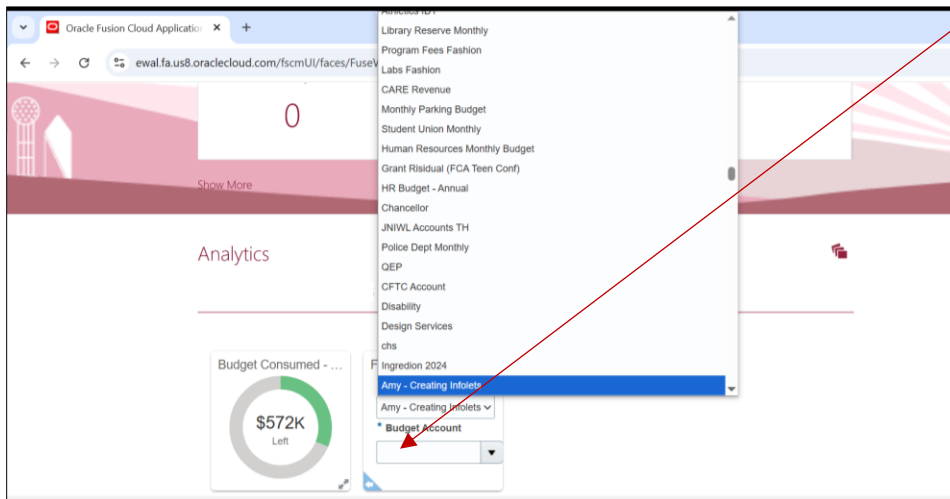
10. Next we will select the small arrow in the bottom right corner.



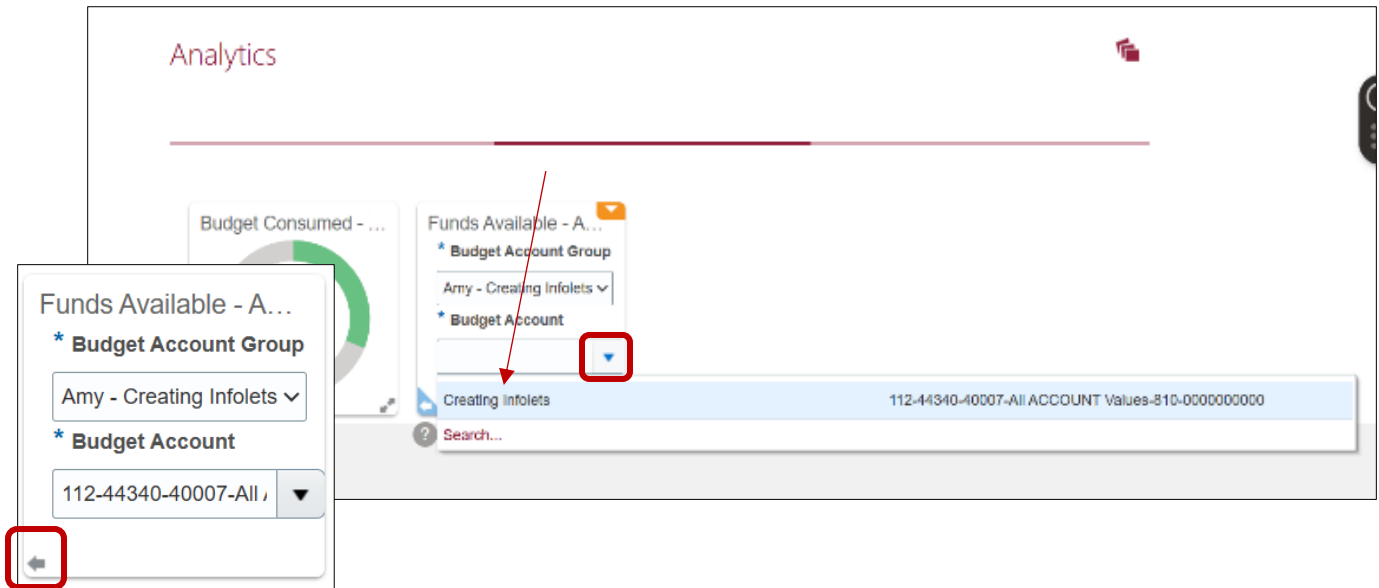
11. The Infolet will flip pages and you will now see the following:



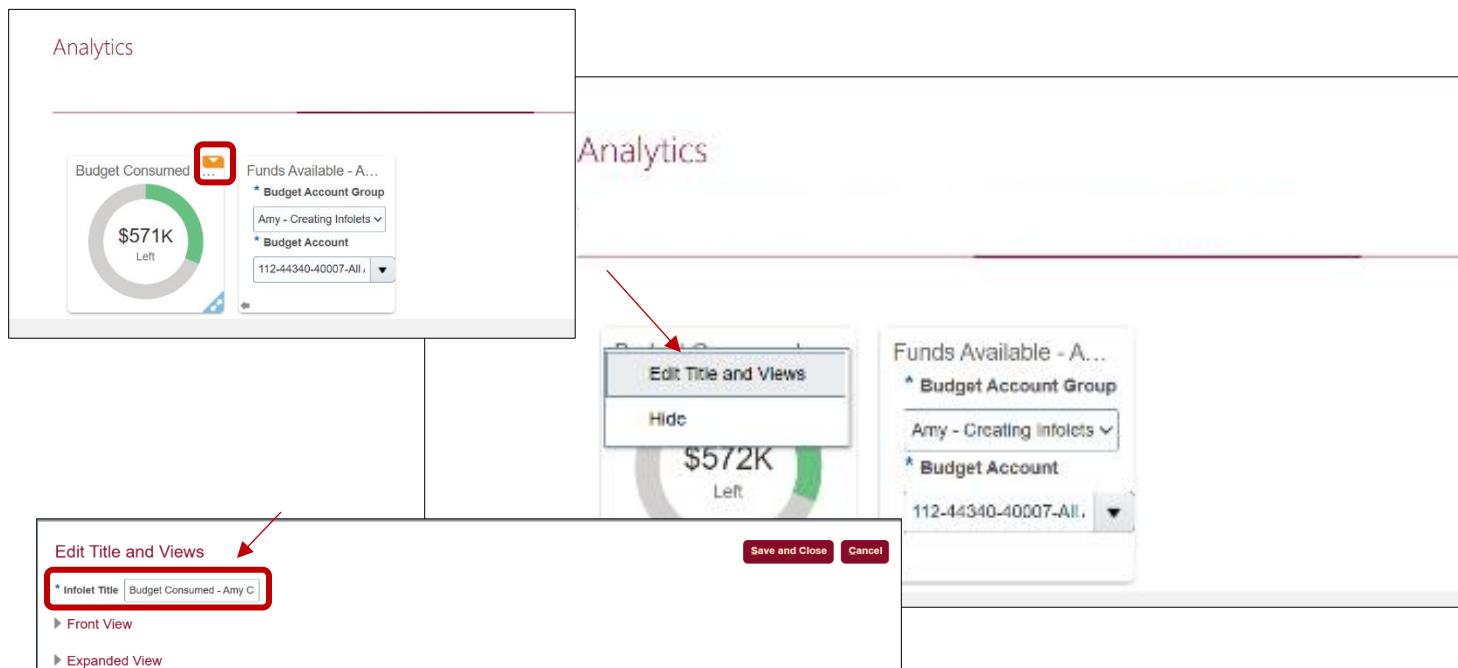
12. Click the Budget Account Group down arrow to display a list of available Budget Account Groups and search for the budget you'll be tracking with the Infolet. I found "Amy – Creating Infolets" by typing the first few letters of the name.



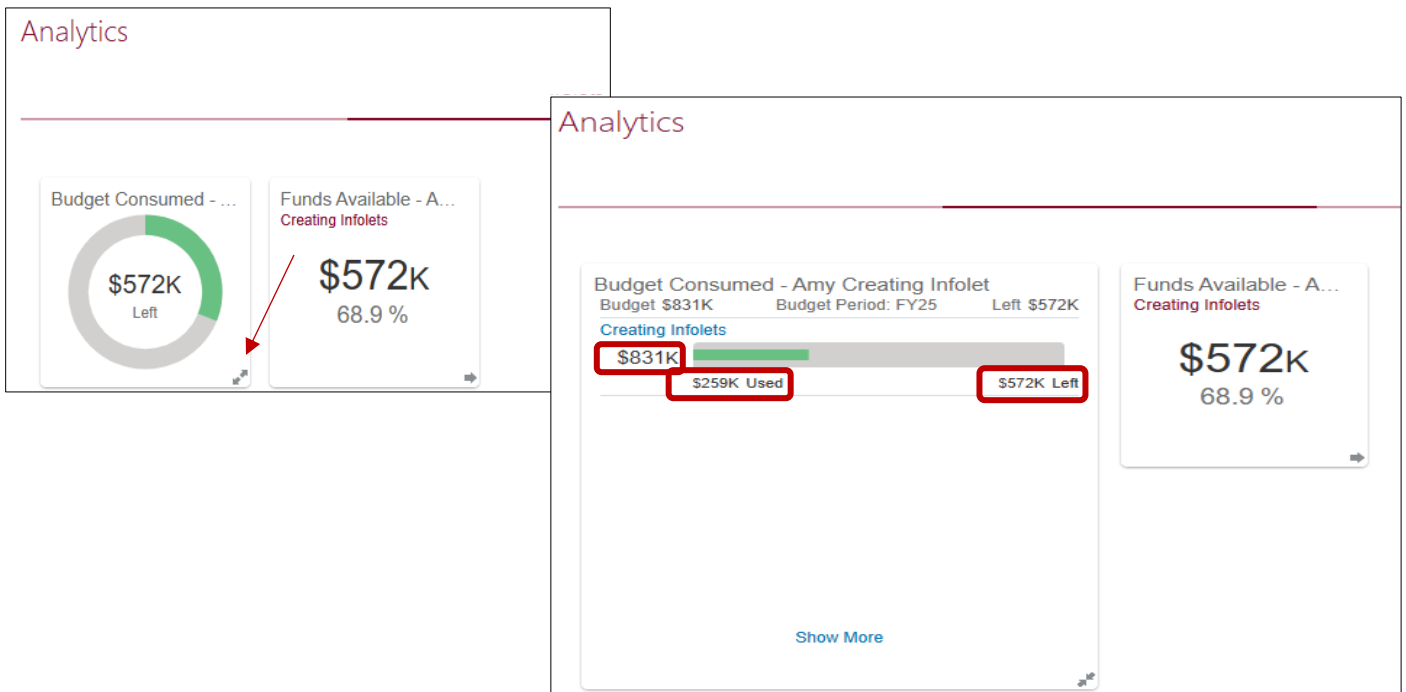
13. Now we will select the down arrow next to “Budget Account” where we will find the budget chart strings that we used to create our budget account group. You can select one of the chart strings to display the Available Funds balance. Next we will select the small grey arrow in the bottom left corner to flip the Infolet back to the detail view.



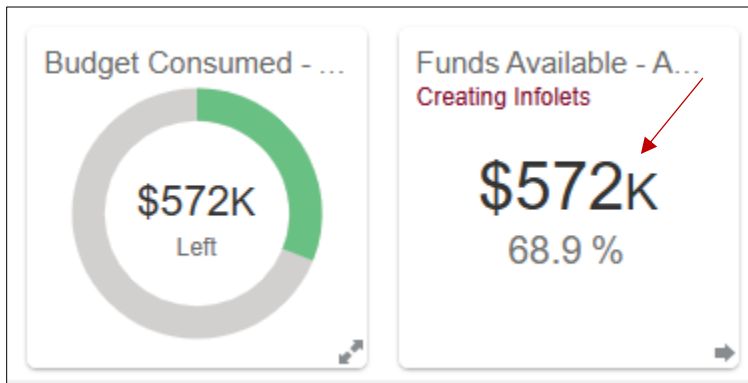
14. Now we will select the orange down arrow in the upper right corner of “Budget Consumed” and then select “Edit Title and Views.” Again, I’m going to change the Infolet Title to include the name of my Budget Account Group. I’ll change my title to “Budget Consumed – Amy Create Infolet” and then select “Save and Close.”



15. After updating the Budget Consumed title, you can click on the two grey arrows in the bottom righthand corner to flip the page and expand the details. You will see the total budget of \$831K, budget used of \$259K, and available budget left of \$572K.



16. We can also utilize the Funds Available infolet to view the details behind the budget balances. If you click on \$572K in the Funds Available infolet, you will be routed to Review Budgetary Control Balances.



Review Budgetary Control Balances (screen shot)

Review Budgetary Control Balances							FUND CLASS 112		ACCOUNT All ACCOUNT Values				
Control Budget		Annual Budget		FUND SOURCE 44340		FUNCTIONS 810							
Currency USD		Budget Period FY25 - FY25		DEPARTMENT 40007		PROJECT 000000000							
Budget Balances							Total Budget	Commitments	Obligations	Other Consumption	Expenditures	Total Consumption	Funds Available Amount
112	44340	40007	MAOPR	810	0000000000	FY25	362,991.67	0.00	35,810.49	0.00	210,560.75	246,371.24	116,620.43
112	44340	40007	OTOPR	810	0000000000	FY25	355,365.00	0.00	0.00	0.00	-27,342.00	-27,342.00	382,707.00
112	44340	40007	PRCST	810	0000000000	FY25	2,188.00	0.00	0.00	0.00	2,222.73	2,222.73	-34.73
112	44340	40007	TRAVL	810	0000000000	FY25	81,601.00	0.00	0.00	0.00	13,733.12	13,733.12	67,867.88
112	44340	40007	WAGES	810	0000000000	FY25	28,600.00	0.00	0.00	0.00	23,647.67	23,647.67	4,952.33
Total							830,745.67	0.00	35,810.49	0.00	222,822.27	258,632.76	572,112.91

17. If you need to make changes to a saved infolet, you start by clicking the grey arrow in the lower right corner of the Funds Available infolet. You will now see the Budget Account Group and Budget Account. If you want to view budget details for another chart string in your Budget Account Group, click the grey down arrow under Budget Account and select your chart string. After making your selection, click the grey arrow in the bottom left corner to return to the Funds Available details.

The screenshot illustrates the process of navigating through budget account groups and accounts. It shows a 'Funds Available - A...' infolet with a '\$572k' value and '68.9%' consumption. A dropdown menu is open, showing 'Budget Account Group' (Amy - Creating Infolets) and 'Budget Account' (112-44340-40007-All). A search bar is visible at the bottom.

*** We hope you found our instructions for creating infolets helpful. If you have any questions or need assistance creating your infolets, please contact Amy Amos with the Budget Team and she will be happy to walk you through the process.