



Quick Reference Guide



Topic : Create a Budget Monitor

Step-by-Step Instructions to create a budget monitor

Introduction

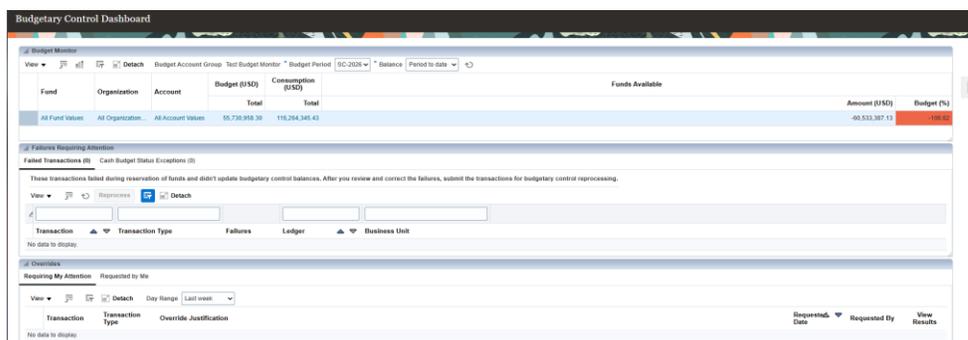
Oracle Fusion Budgetary Control allows organizations to manage and control budget amendments efficiently. You can create a budget monitor to keep track of activities impacting a Control Budget. This document describes the process of setting up a budget monitor

Steps to Review Budget Balances

1. Log in to **One Connect**
2. **From the landing (Home) page** – use the < or > navigate to Budgetary Control and click it icon



3. Upon clicking the icon, you should land at the “Budgetary Control Dashboard”





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4. In the “**Budget Monitor**” area, click on the view dropdown. Then click on “**Budget Account Group**”, then click “**Create**”

Budgetary Control Dashboard

Budget Monitor

View Budget Account Group Test Budget Monitor Budget Period SC-2026 Balance Period to date

Unit	Budget (USD)	Consumption (USD)	Funds Available
Total	Total	Total	
Amount Values	55,730,958.30	116,264,345.43	
Amount (USD)			-60,533,387.13
Budget (%)			-108.62

Budget Status Exceptions (0)

These transactions failed during reservation of funds and didn't update budgetary control balances. After you review and correct the failures, submit the transactions for budgetary control reprocessing.

Reprocess

Transaction Transaction Type Failures Ledger Business Unit

No data to display.

Overrides

Requiring My Attention Requested by Me

View Day Range Last week

Transaction	Transaction Type	Override Justification	Requested Date	Requested By	View Results
No data to display.					

5. The “**Budget Account Group Form**” displays
6. Enter the name for the monitor.
7. Select the “**Control Budget**” you wish to monitor
8. Enter a description
9. Select the option to make the monitor “**Private**” or “**Public**”
10. Click the **+** add a row
11. Click each drop down to select the “**Fund**”, “**Organization**” and “**Account**”
12. You can search for values by clicking search at the bottom of the drop down

Budget Accounts

View Format + X Freeze Wrap

Budget Account Label * Fund * Organization * Account

10010 200101

Account	Account	Account
All Account Values	All Account Values	All Account Values
1011-CASH - T...	1011	1011
1015-QSCB 20...	1015	1015
1016-QSCB PR...	1016	1016
1017-QSCB PR...	1017	1017
1020-CASH - P...	1020	1020
1023-CASH - 8...	1023	1023
1024-CASH - 8...	1024	1024
1025-CASH - CSA	1025	1025

Search...



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13. A search window appears enter a least three characters of the value you are looking for.

14. Highlight the value and click “OK”

Description	Member Name	Member Unique Name
200101-MAYOR...	200101	200101
200102-MAYOR...	200102	200102
200119-MAYOR...	200119	200119
200201-PUBLIC...	200201	200201
200219-PUBLIC...	200219	200219
200221-VIRTUA...	200221	200221
200301-CAO-A...	200301	200301
200302-INTER...	200302	200302
200303-OFFIC...	200303	200303
200304-SHEL...	200304	200304

15. Click “Save and Close”

Create Budget Account Group

General

Name: CAC Budget Monitor
Control Budget: SC Budget New
Description: Sample Budget Monitor
Access: Private
Owner: costansia.a.crosby@accenture.com

Funds Availability as a Percentage of Budget

Starting from 100% Funds Availability
Running Low
Critically Low

Budget Accounts

Budget Account Label: 10010 Fund: 200101 Organization: 200101 Account: 5102

16. The budget should appear in the monitor. You can add and adjust columns as needed

Ind	Fund Description	Organization	Organization Description	Account	Account Description	Budget (USD)			Consumption (USD)			Funds Available				
						Initial	Adjustments	Total	Unreleased	Commitments	Obligations	Other	Expenditures	Total	Amount (USD)	Budget (%)
010	10010-GENERAL FUND	200101	200101-MAYOR'S O...	5102	5102-SALARIE...	633,236.36	-4,000.00	627,236.36	0.00	0.00	0.00	0.00	52,689.27	52,689.27	574,547.09	91.60