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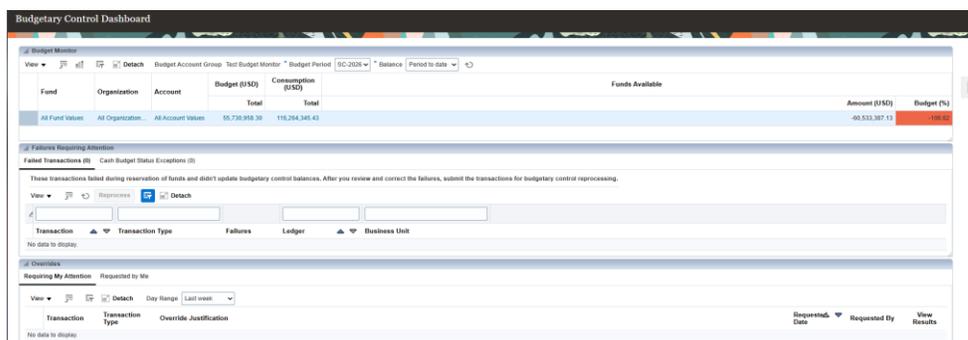
4. In the **"Budget Monitor"** area, click on the view dropdown. Then click on **"Budget Account Group"**, then click **"Create"**

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

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

14. Highlight the value and click **"OK"**

15. Click **"Save and Close"**

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