

# How to Create Infolets in Oracle Fusion

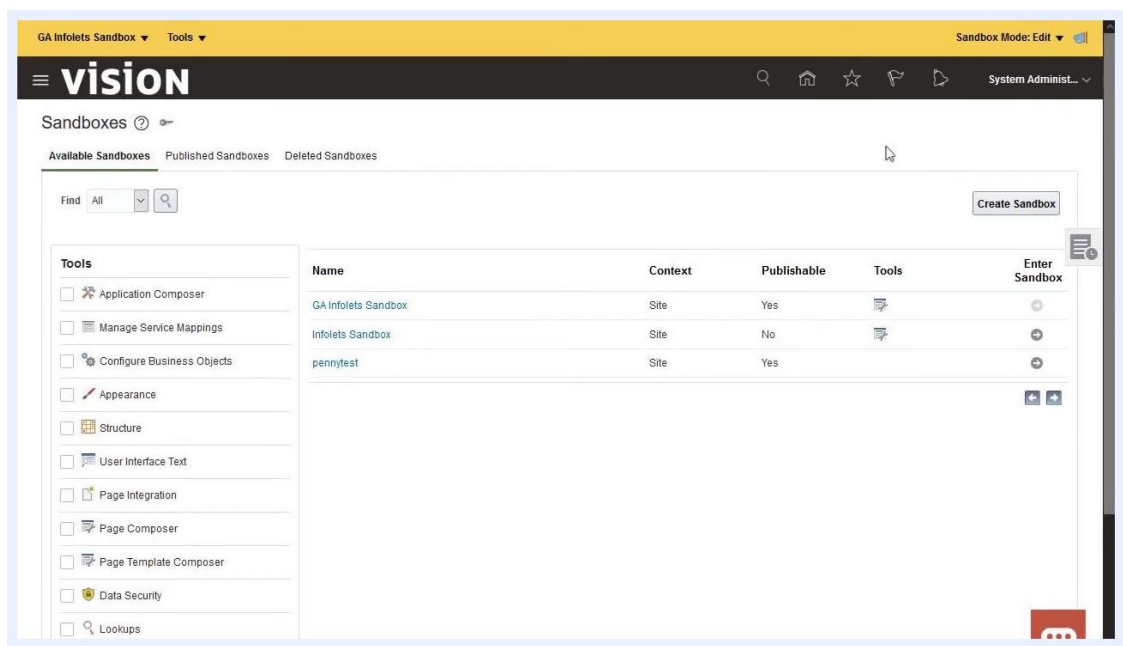
Infolets are small, interactive widgets that display key information relevant to your work areas. You can use them to monitor important metrics and identify items that may require follow-up. This guide explains how to create infolets in Oracle Fusion, from setting up your sandbox to configuring views, adding content, and publishing the finished infolet for all users.

## Prerequisites

Before you create an infolet, ensure you have access to a sandbox environment with the **Page Composer** tool enabled and set to the **Site Context** layer. You can test your new infolet in the sandbox before making it available to all users.

## Step 1: Enter the sandbox

From the **Sandboxes** screen, locate a sandbox with the **Page Composer** tool and **Site Context** enabled. Example sandboxes include "GA Infolets Sandbox," "Infolets Sandbox," and "pennytest." Make sure the selected sandbox is publishable and has the required tools enabled.

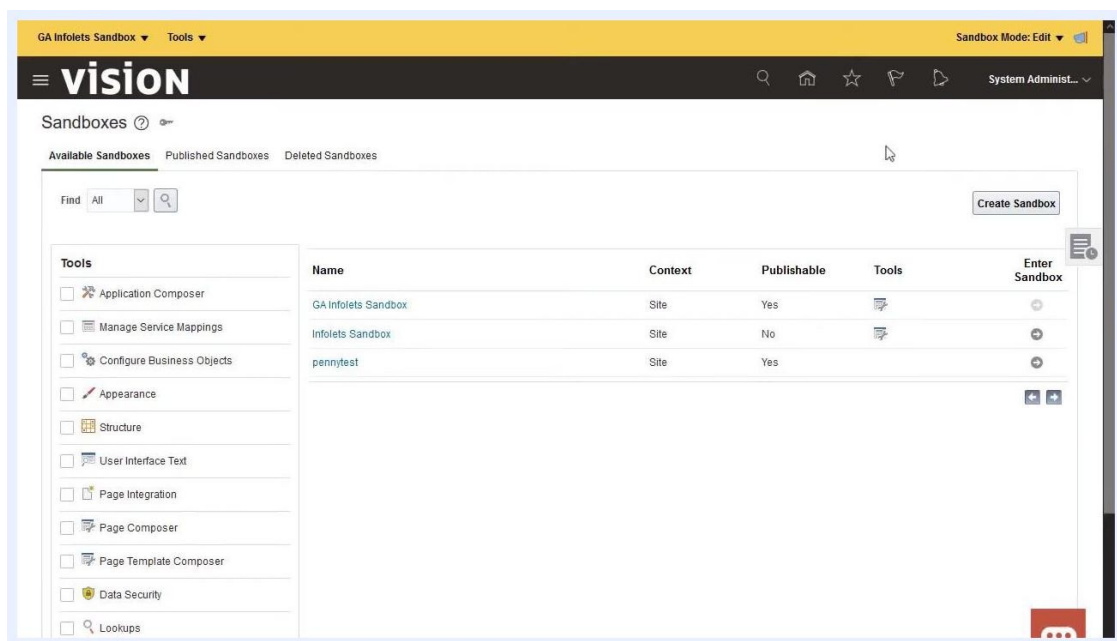


**Sandboxes screen showing available sandboxes, their context, publishable status, and enabled tools**

Click the **Enter Sandbox** icon next to your chosen sandbox to begin editing.

## Step 2: Navigate to the infolet page

Go to the page where you want to add the new infolet. For example, the Analytics dashboard displays various infolets such as Close Calendar, Global Revenues, AR Reconciliation, AP Reconciliation, Travel Costs, Journals by Status, and Unallocated. Tabs at the top may include **General Accounting Infolets**, **Source to Settle Infolets**, **Plan to Produce Infolets**, and **Order to Cash Infolets**. Review the existing infolets to understand the layout and available information.



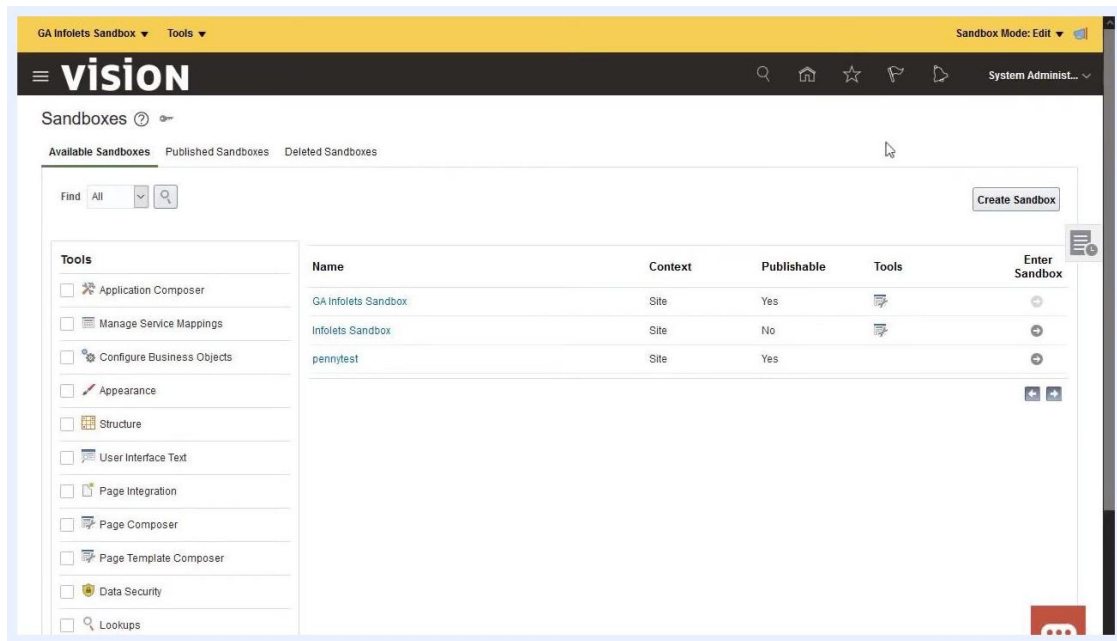
**Analytics dashboard showing multiple infolets with key metrics and tabs for different infolet categories**

## Step 3: Select Edit Pages

On the infolet page, select **Edit Pages** to enable editing mode.

## Step 4: Open the infolet repository and create a new infolet

Click the **Infolet Repository** icon, typically found in the editing toolbar or menu. A dropdown appears listing available infolets and categories, such as AP Reconciliation, AR Reconciliation, Balance Sheet, Cash, Claims by Reason, Close Calendar, Debt, Global Revenues, IC Reconciliation, IC Transactions, Income, Journals, Margin YTD, Margins, Open Subledgers, Policy by Product, Travel Costs, and Turnover.

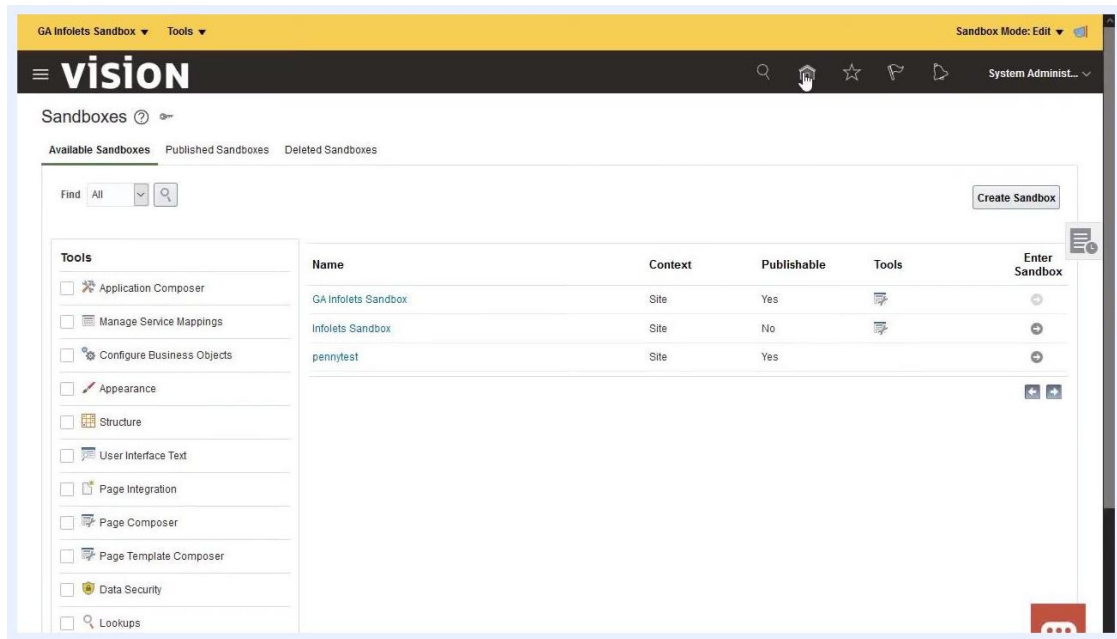


**Analytics dashboard in edit mode with the Infolet Repository dropdown open, showing a list of available infolets**

In the **Infolet Repository**, select the option to create a new infolet.

## Step 5: Configure the infolet views

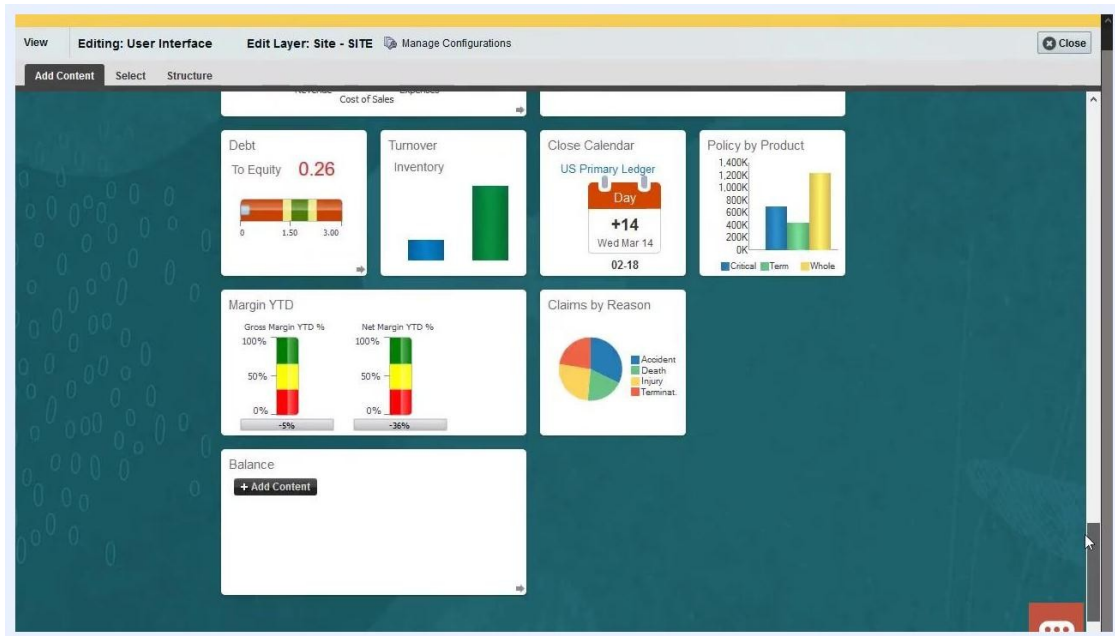
Enter the infolet title (for example, "Balance"). Specify the front view dimensions by selecting from options such as 1x1, 2x1, 3x1, 1x2, 2x2, 3x2, 1x3, or 2x3. Enable the back view, which automatically inherits the same dimensions as the front view. Enable the expanded view if you need a larger display area.



**Create Infolet: Select Views screen showing title entry, dimension selection, and options for front, back, and expanded views**

## Step 6: Add content to the infolet

Once the infolet is created, locate it on the dashboard (for example, the "Balance" infolet with an **Add Content** button). Click **Add Content** to begin populating the infolet with data or visualizations.



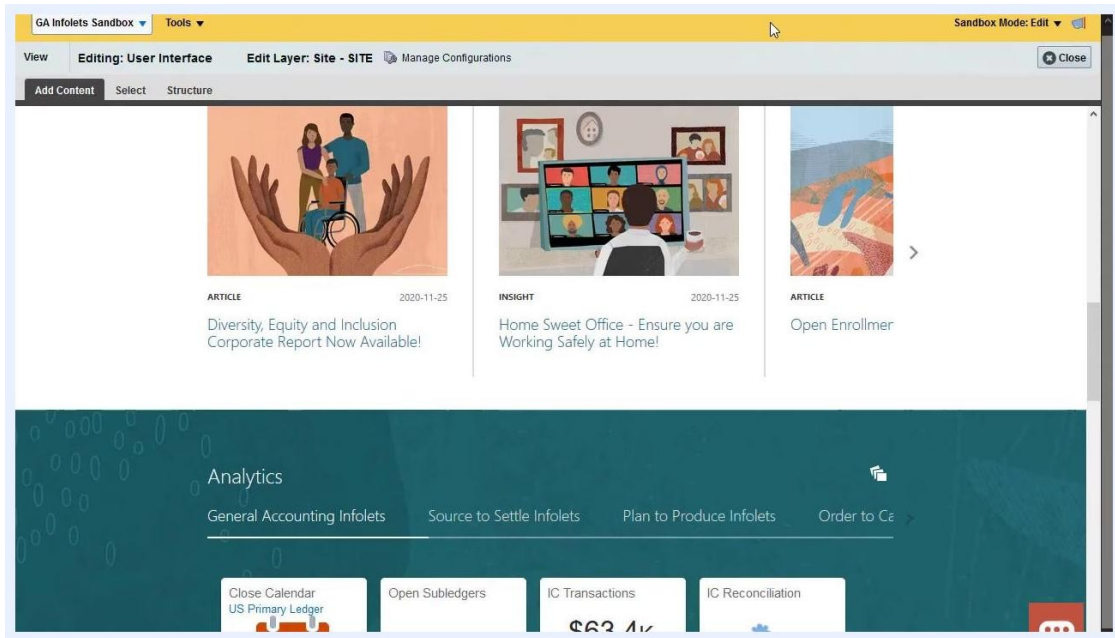
Dashboards showing the newly created "Balance" infolet with an Add Content button, ready for content addition

## Step 7: Add a report to the infolet

To add content, navigate through the Reports and Analytics folder structure: **BI Presentation Server > Shared Folders** > continue navigating to the desired report. Select the desired report and add it to the infolet's front view.

## Step 8: Add a link to a detailed report

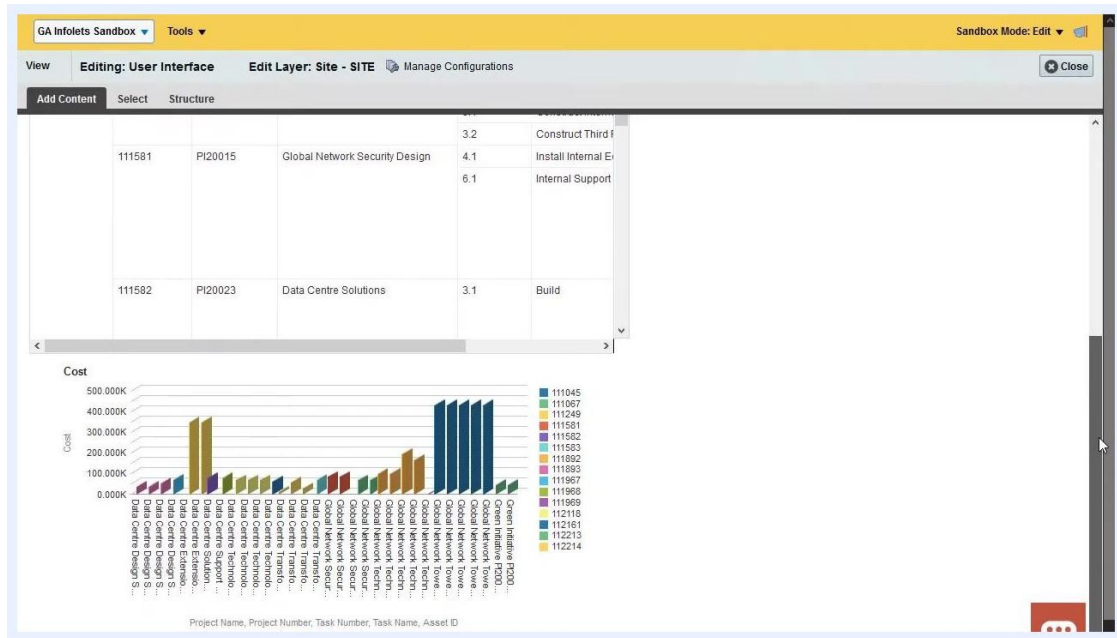
For more detailed information, add a link to the detailed report within the infolet. This allows users to access comprehensive data directly from the infolet.



**Dashboard in edit mode, showing the infolet area and options to add or link detailed reports**

## Step 9: Add content to the detailed report page

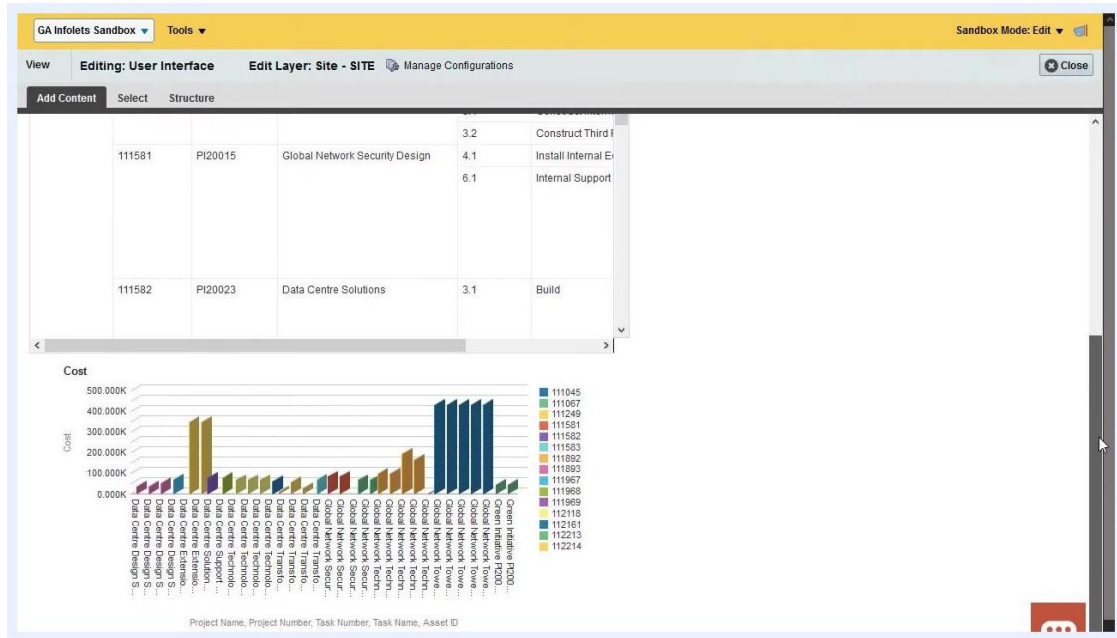
Navigate to the Reports and Analytics folder structure and select the desired report (for example, "Assets by Categories and Projects"). Add the report to the detailed report page, then click **Done** when finished.



Detailed report page showing "Assets by Categories and Projects" with project details and a cost chart

## Step 10: Return to the infolet for additional content

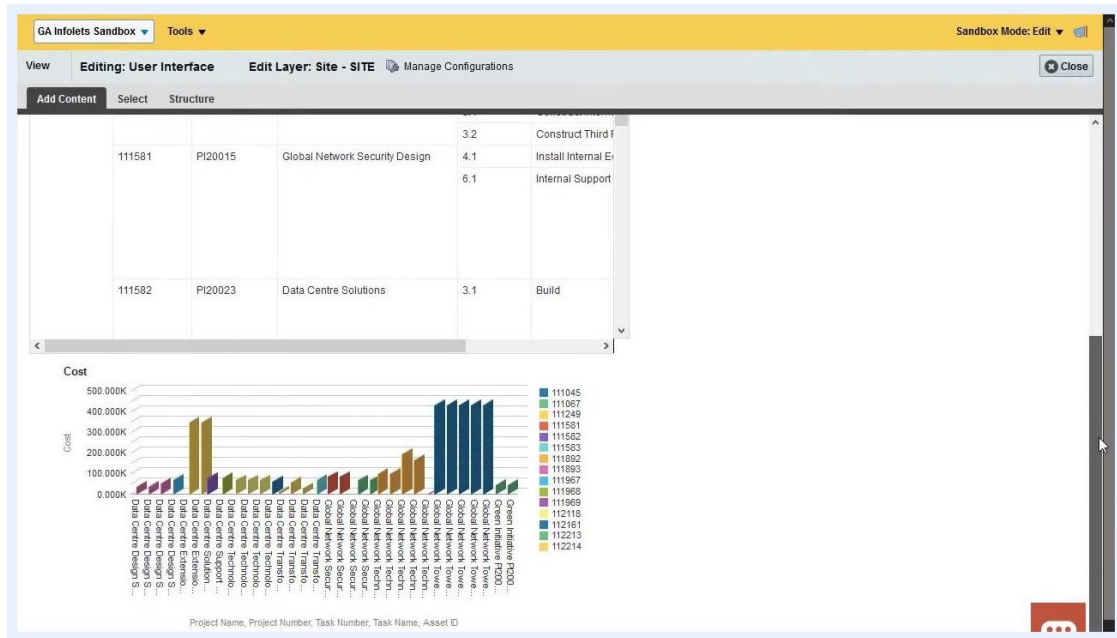
Navigate back to your infolet on the dashboard. Follow the same steps as before to locate and add another report to the infolet's back view.



Dashboard with infolets, including the "Balance" infolet, ready for additional content to be added

## Step 11: Add a report to the expanded view

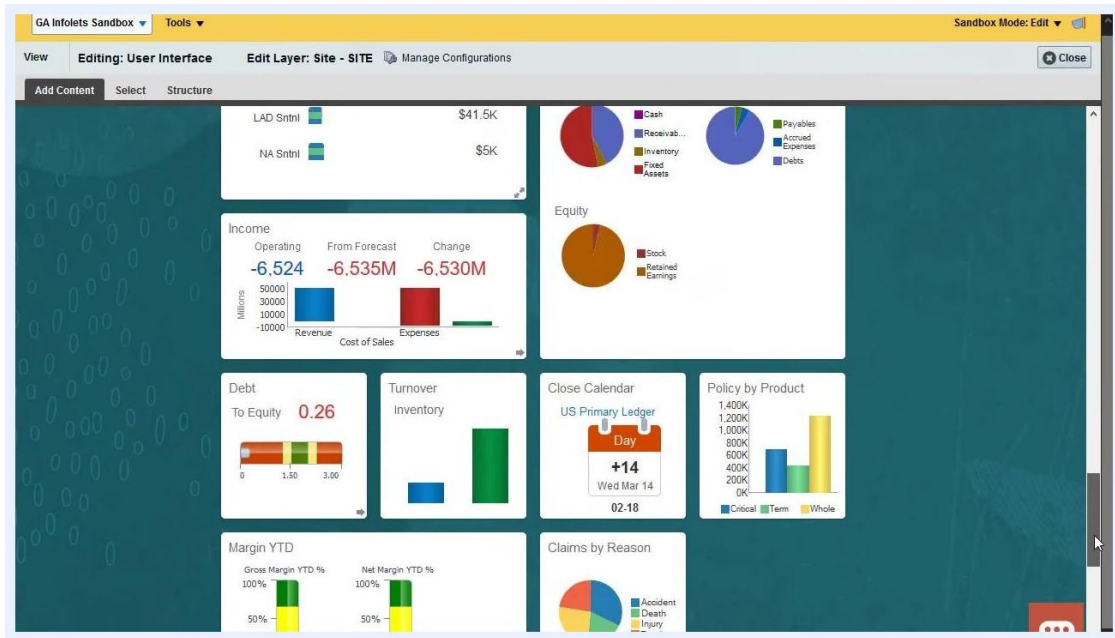
Select the expanded view option for your infolet. Navigate to the Reports and Analytics folder, then select and add the appropriate report to the expanded view.



Dashboard showing infolets with various charts and graphs, including the expanded view being configured

## Step 12: Review the completed infolet

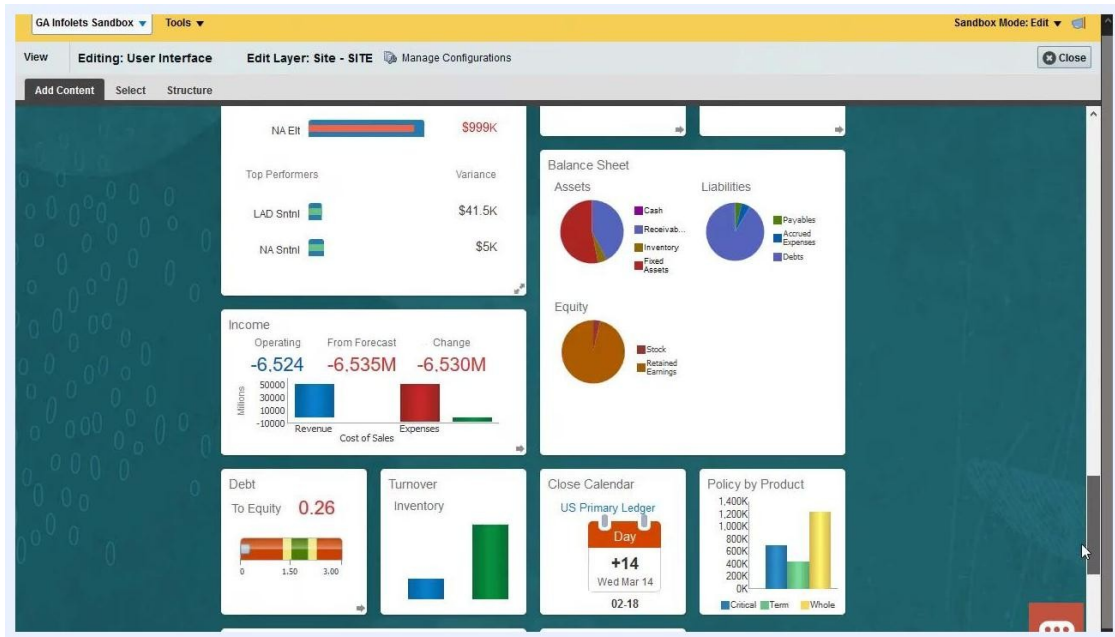
Confirm that all required views—front, back, and expanded—have the correct reports and visualizations, and that the infolet displays all necessary data and links.



**Dashboard with all infolet views populated, showing charts for assets, liabilities, equity, income, and more**

## Step 13: Close the infolet editing session

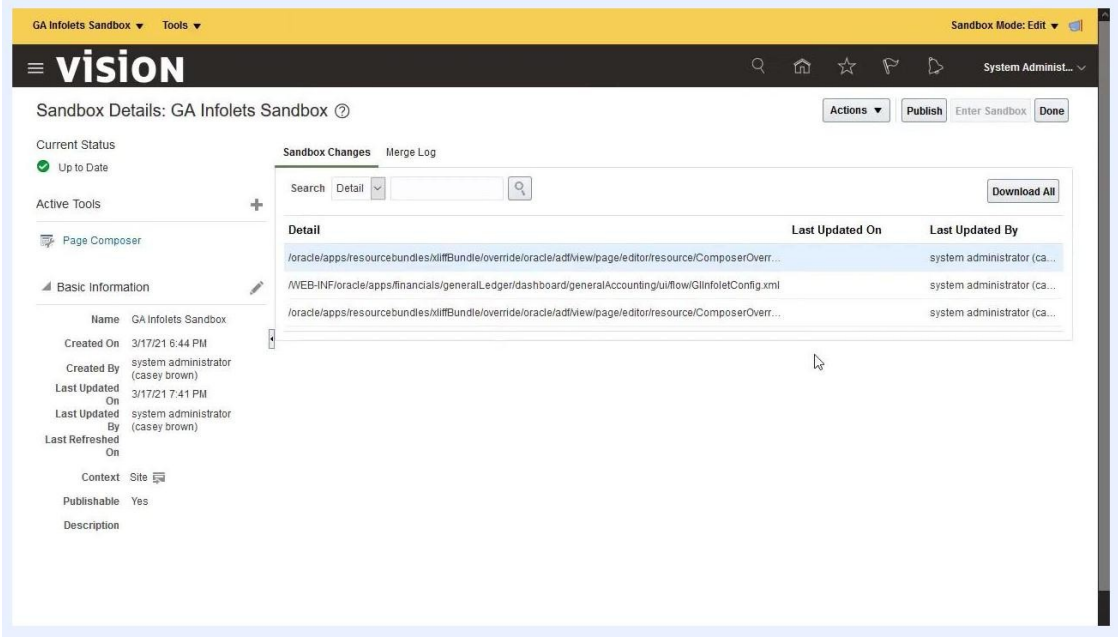
Click **Close** in the editing toolbar to exit the infolet configuration mode.



Dashboard with infolets, editing session ready to be closed

## Step 14: Preview the infolet

Preview the infolet to verify its appearance and functionality. Drill down to the detailed report to confirm the link works, and review the back and expanded views for accuracy.



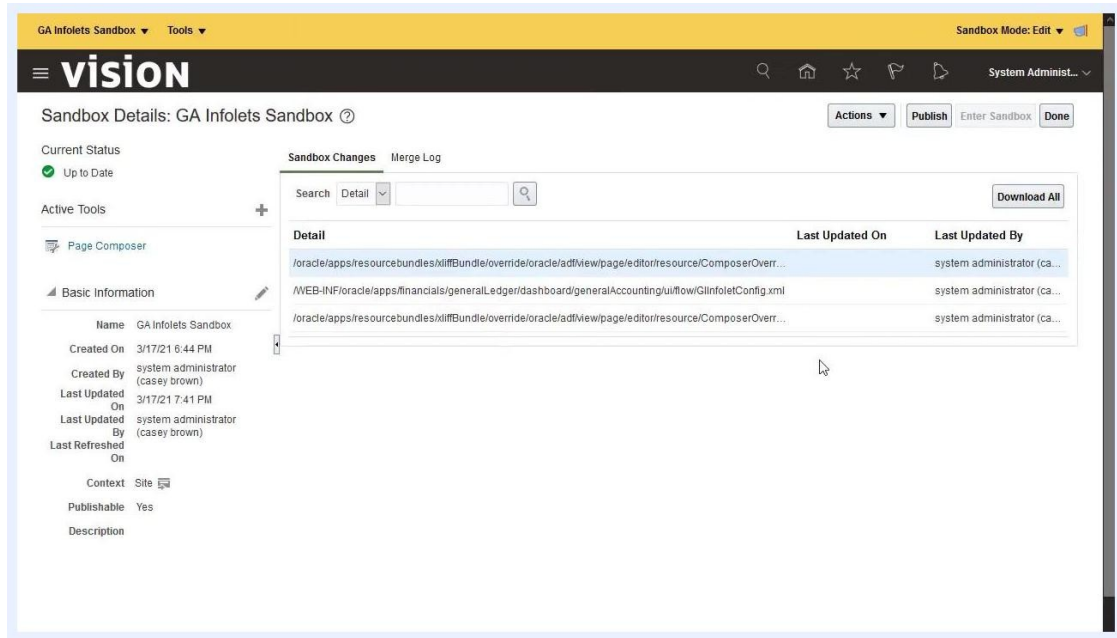
The screenshot shows the Vision application interface. The top navigation bar includes 'GA Infolets Sandbox' and 'Tools'. The main header displays the 'vision' logo and a 'System Admin...' dropdown. The page title is 'Sandbox Details: GA Infolets Sandbox'. The left sidebar shows 'Active Tools' with 'Page Composer' and 'Basic Information'. The main content area has 'Sandbox Changes' and 'Merge Log' tabs. The 'Sandbox Changes' tab is active, showing a table of changes. The table has columns for 'Detail', 'Last Updated On', and 'Last Updated By'. The 'Detail' column contains file paths, and the 'Last Updated By' column shows 'system administrator (ca...)'. The 'Last Updated On' column shows dates and times.

| Detail                                                                                                 | Last Updated On | Last Updated By              |
|--------------------------------------------------------------------------------------------------------|-----------------|------------------------------|
| /oracle/apps/resourcebundles/.../Bundle/override/oracle/adf/view/page/editor/resource/ComposerOverr... |                 | system administrator (ca...) |
| /WEB-INF/oracle/apps/financials/generalLedger/dashboard/generalAccounting/ui/flow/GIInfoletConfig.xml  |                 | system administrator (ca...) |
| /oracle/apps/resourcebundles/.../Bundle/override/oracle/adf/view/page/editor/resource/ComposerOverr... |                 | system administrator (ca...) |

Detailed report preview showing "Assets by Categories and Projects" with project and cost details

## Step 15: Finalize and publish the sandbox

Navigate to the **Sandbox Details** page and click **Publish** to make your new infolet available to all users. Confirm the publish action when prompted.



Sandbox Details page showing GA Infolets Sandbox, with the Publish button highlighted

## Step 16: Verify the infolet is available

Return to the dashboard and confirm that your new infolet is visible and accessible to users.

## Summary

By following these steps, you can create, configure, and populate a new infolet in Oracle Fusion, making key information easily accessible and actionable for users. With all views configured and content added, publishing the sandbox ensures key metrics and reports are available organization-wide.