### Policy Reminders:

- **Office Hours, Instructor-Led Training sessions, and Hot Topics.** Be sure to try out the requisitions and invoices on behalf of their financial unit.

### Oracle: Buying and Paying for PO Requisitioners

- **Thursday, December 2, 2021 @ 9:00am - 11:00am**

  This course includes hands-on instruction on the use of Oracle Procurement & Payables. Participants must first complete the associated introduction to Oracle Procurement & Payables eCourse.

### Current and Prospective Cardholders

- **Tuesday, December 7, 2021 @ 1:30pm - 4:00pm**

  Participants will learn about updates to the University Procurement Card Program through the UC Learning Center.

### Financial Management Office

- **Thursday, December 2, 2021 @ 9:00am - 9:30am**

  To prepare for the launch of the new Oracle Redwood theme, we encourage you to attend our Oracle Redwood Preview Session held at this Thursday, December 2 @ 9:00am - 9:30am.

  Stay tuned for more features from the new Oracle Redwood theme. If you want to see firsthand what the Oracle Redwood theme offers, be sure to have your questions ready.

- **Thursday, December 9, 2021 @ 9:00am - 11:00am**

  We encourage you to review the Preparation Toolkit with your colleagues across the UCPath environment.

### Grade Booklet

- **Thursday, December 2, 2021 @ 9:00am - 9:30am**

  The report is recommended for use to view multiple Financial Units or multiple financial units. The project balances are finalized during the annual campus budget development process.

### Financial Management Reporting Panorama

- **December 2 @ 9:00am - 9:30am**

  The report includes the following fund categories: Core, Other Funded, Unrestricted Funds, and Restricted Funds.

  This report is slightly different from the GL Project Balances report as it is a consolidated report showing the consolidated summary output of data balances, also known as Resources Available, for a selected single financial unit or multiple financial units.

### Oracle Redwood: How To Create Favorites

- **Oracle Redwood UI Blink Page**

  Current favorites will function as they did in the previous light blue UI. If you have favorites bookmarked in the old UI, it should transfer to the new Redwood UI. If you would like to explore how to create new favorites or manage your favorites, please visit our page "How To Create Favorites".

#### Starred Favorites

- **Starred Favorites**

  - Does not allow you to have projects across users (but you can share this customization with your colleagues) that you would like to have in a consolidated report.
  - Broader, less granular customization as needed.
  - Have to maintain/update across users (but you can share this customization with your colleagues).

#### Options for Grouping Projects

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<thead>
<tr>
<th>Description</th>
<th>Options</th>
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<tbody>
<tr>
<td>Project naming conventions controlled</td>
<td>- Department Reporting</td>
</tr>
<tr>
<td>- Financial segment elements</td>
<td>- Broader, less granular</td>
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<tr>
<td>- Project Classifications</td>
<td>- Have to maintain/update across users (but you can share this customization with your colleagues)</td>
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<td>- Starred Favorites</td>
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<td>- OTBI reports</td>
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<td>- Activity Hub</td>
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#### Project Data

- **Other Existing Reports**

  The report is a consolidated output of data for a single financial unit. It is available as a Project Data report. It can only be run for two fiscal years, FY21 and FY22, and only contains data for Financial Units that have had pending transactions in the fiscal year.

  The report includes total project balances for each fiscal year, the current year budgeted amounts (by 4 major expense categories: Academic Salary & Benefits, Academic Non-Salary, Operating & Public Services, Capital Projects & Services), and the previous year budgeted amounts.

  The report is available in the Budget & Finance Activity Hub. The selection meets your needs.

### Oracle Redwood: Core Recurring Target Budget by Year

- **Oracle Redwood: Core Recurring Target Budget by Year**

  The report is a consolidated output of data for a single financial unit. It is available as a Core Recurring Target Budget report. It can only be run for two fiscal years, FY21 and FY22, and only contains data for Financial Units that have had pending transactions in the fiscal year.

  The report includes total project balances for each fiscal year, the current year budgeted amounts (by 4 major expense categories: Academic Salary & Benefits, Academic Non-Salary, Operating & Public Services, Capital Projects & Services), and the previous year budgeted amounts.

  The report is available in the Budget & Finance Activity Hub. The selection meets your needs.

### Oracle Redwood: Unrestricted Funds by Year

- **Oracle Redwood: Unrestricted Funds by Year**

  The report is a consolidated output of data for a single financial unit. It is available as an Unrestricted Funds report. It can only be run for two fiscal years, FY21 and FY22, and only contains data for Financial Units that have had pending transactions in the fiscal year.

  The report includes total project balances for each fiscal year, the current year budgeted amounts (by 4 major expense categories: Academic Salary & Benefits, Academic Non-Salary, Operating & Public Services, Capital Projects & Services), and the previous year budgeted amounts.

  The report is available in the Budget & Finance Activity Hub. The selection meets your needs.

### Oracle Redwood: Financial Unit Projects

- **Oracle Redwood: Financial Unit Projects**

  The report is a consolidated output of data for a single financial unit. It is available as a Financial Unit Projects report. It can only be run for two fiscal years, FY21 and FY22, and only contains data for Financial Units that have had pending transactions in the fiscal year.

  The report includes total project balances for each fiscal year, the current year budgeted amounts (by 4 major expense categories: Academic Salary & Benefits, Academic Non-Salary, Operating & Public Services, Capital Projects & Services), and the previous year budgeted amounts.

  The report is available in the Budget & Finance Activity Hub. The selection meets your needs.

### Oracle Redwood: Financial Unit Project Balances

- **Oracle Redwood: Financial Unit Project Balances**

  The report is a consolidated output of data for a single financial unit. It is available as a Financial Unit Project Balances report. It can only be run for two fiscal years, FY21 and FY22, and only contains data for Financial Units that have had pending transactions in the fiscal year.

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