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December 7, 2021 | 49th Edition

Central Campus Assessments now in PPM

PPM has been updated to include central campus assessments and will be effective beginning Thursday, December 9. These changes include:
- **Auxiliary and Self-Supporting Activities (ASSA)** Administrative Overview
- **Central Administration Differential Income (DI)** overview

For more information, please visit the PPM webpage at https://ppm.ucsd.edu.

Based on the feedback from the Finance and Project Planning teams, we have updated our monthly revenue reports, a link to the updated financial task tracking tool (TPP) is now available on the PPM main menu.

Intranet changes, including the new Task Statuses, have been finalized to help provide better visibility to the Finance Team and the Finance Office. For more information, please visit the PPM webpage.

In addition to the new Task Statuses, we have also implemented a new feature called the ‘Allocation Transfer’ feature. This feature allows for the allocation of costs across different financial units and projects. A new feature, ‘Management Review’, has been added to enable supervisors to review the allocations made by their subordinates. This feature can be accessed through the PPM main menu.

For more information about this new feature, please visit the PPM webpage or contact the Finance Office.

Oracle Redwood

New WalkMe Guidance

New guidance has been added for Concur: Allocation Training Video. The new guidance covers what an Allocation is, how to create and save Allocations, and some tips & tricks to make allocating expenses in Requests and Expense Reports a breeze.

Concur: Allocation Training Video

A new Concur training video has been published providing a detailed walk-through of the allocation process. This video is available on the Oracle Redwood Training website and can be accessed directly through the Oracle Redwood Office Hours.

Oracle Redwood

New Training Video

New training videos have been added for the following courses:
- Office Hours, Instructor-Led Training sessions, and Hot Topics. Be sure to try out the new videos and share your feedback with us.
- Central Administration Differential Income (DI) Assessment
- Oracle: Buying and Paying for Financial Unit Approvers

This Thursday, the Fund Management Office Hours will kick off with a discussion on Central Administration Differential Income (DI) Assessment.

To see the WalkMe guidance in action, visit the Oracle Redwood Information Session. To see the WalkMe guidance in action, visit the Oracle Redwood Information Session.

Training & Support

Fund Management Office Hours

The Training & Support Office is here to help you. Please don’t hesitate to reach out to us with any questions or concerns you may have. Our team is here to support you and ensure that you have a positive experience using the Oracle Redwood system.

This Thursday, the Fund Management Office Hours will kick off with a discussion on Central Administration Differential Income (DI) Assessment.

In Case You Missed It:

Oracle Redwood

Oracle Redwood Information Session

Recorded Information Session from December 2 (SSO required to view changes launching in production January 2022)

Oracle Redwood Overview eCourse

WalkMe: FAM Office Hours Features

UI Theme? Learn more about WalkMe buttons may do as you hover over them.

FAM Information Session:
- Oracle Redwood Information Session
- Oracle Redwood Overview eCourse
- Oracle Redwood UI Blink Page
- Recorded Information Session from December 2 (SSO required to view changes launching in production January 2022)
- Oracle Redwood Overview eCourse
- Oracle Redwood UI Blink Page

Non-Production Environment - VPN and SSO are required. Since this is a test environment, data may not be the same as in production. If you experience issues during login, you can request access support by emailing financesupport@ucsd.edu.

* You can view the upcoming Oracle Redwood UI changes in the Oracle Test Non-Production Environment*.

For more information on ASSA and DI assessment rates, visit the SSA Assessment page on Blink.

For revenue that is posted to Project # 0000000 in the GL, assessments will be charged to the lowest numbered task.

In cases where there is no active Task that points to the FinUnit-Fund-Project combination where the revenue was received, assessment charges will post to the lowest numbered Project/Task as needed.

For revenue-based assessments (i.e. ASSA and DI), there will be a 5-month catch-up (June 2021 – October 2021) that is planned for the November ledger period.

Additional Resources for Users - Oracle Redwood

To see the WalkMe guidance in action, visit the Oracle Redwood Information Session. To see the WalkMe guidance in action, visit the Oracle Redwood Information Session.

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Central Administration Differential Income (DI) Assessment

Auxiliary and Self-Supporting Activities (ASSA) Administrative Overhead

Central Campus Assessments in PPM

Beginning in FY22, the following central campus assessments will be transacted into PPM at the Project & Task level:

- Central Administration Differential Income (DI) Assessment
- Auxiliary and Self-Supporting Activities (ASSA) Administrative Overhead
- Supporting Activities (ASSA) Administrative Overhead

For more information on ASSA and DI assessment rates, visit the SSA Assessment page on Blink.

For revenue that is posted to Project # 0000000 in the GL, assessments will be charged to the lowest numbered task.

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For revenue-based assessments (i.e. ASSA and DI), there will be a 5-month catch-up (June 2021 – October 2021) that is planned for the November ledger period.

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