

ENHANCEMENTS DIRECTORY

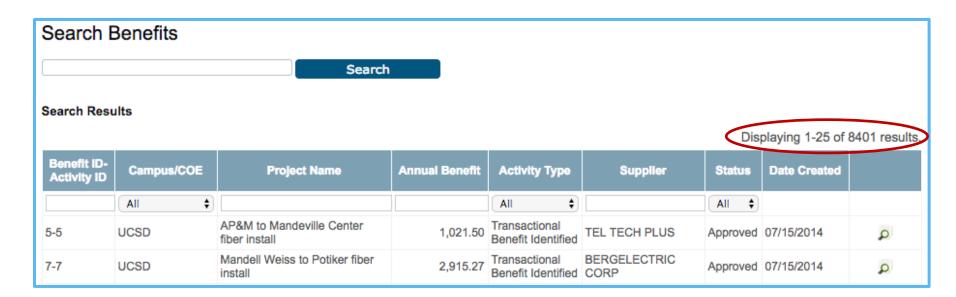
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For easier reference, the benefits on your Dashboard list will now display with the most recent Benefit entries at the top of the first page. (rather than displaying in entry order or by Benefit ID/Activity ID).

<u>Note</u>: Search results will continue to be listed by Benefit ID/Activity ID.

Pen	ding Approval (54)	Re	eturned (14)	Appro	oved (7844)		Rejected (55	8)	AII (8470)	
	Displaying 1-25 of 8470 results Go to page: << First < Previous 1 2 3 4 5 6 7 8 9 10 Next > Last >>										
Benefit ID- Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Submitter	Approver	Status	Selected for Audit	Agreement Date		
					•	•	•	•			
17901-17937	Building Management Systems	759,069.00	3,795,345.00	*Other	Adrian Ferreira	Jeremy Meadows	Approved	No	12/01/2017	٥	
18051-18087	Negotiated paper price reduction	15,800.00	15,800.00	GIVE SOMETHING BACK INC	Alex Butler	Stacey Templeman	Submitted	No	11/30/2017	٥	
18057-18093	Give Something Back Extension	122,322.00	122,322.00	GIVE SOMETHING BACK INC	Alex Butler	Stacey Templeman	Submitted	No (11/30/2017	٥	
18115-18151	Test Benefit UM	2,500.00	2,500.00	FREEWAVE TECHNOLOGIES INC	Test Submitter	Test Approver	Resubmitted	No	11/29/2017	٥	
18063-18099	Proc 571- report	5.00	5.00	BOYS & GIRLS CLUB	Jacquelyn Johnson	Justin Sullivan	Submitted	No	11/28/2017	٥	

To see more Benefit entries with fewer clicks, now 25 benefits are displayed per page in both your Search results and Dashboard lists (lists formerly showed only 10 results per page).





For quicker and more accurate navigation of both your Search results and Dashboard lists, you'll see new First, Last, Previous, or Next buttons in the 'Go to page:' navigation section of your Search results and Dashboard lists.

65-65	UCSF	Public Relations & Event Promotion of UCSF's Mission Bay Hospital	16,840.00	Transactional Benefit Identified	*Other	Approved	07/16/2014	٥
67-67	UCSF	Care Ecosystem RFP	1,399,944.00	Sourcing Benefit Identified	SUBAWARD-UCSF	Approved	07/16/2014	٩
69-69	UCSC	ITS Instrutional Computing Lab	898.45	Transactional Benefit Identified	DELL INC	Approved	07/16/2014	٩
			Go to page:	First < Previous	2 3 4 5	6 7 8	9 10 Nex	tt> Last>>





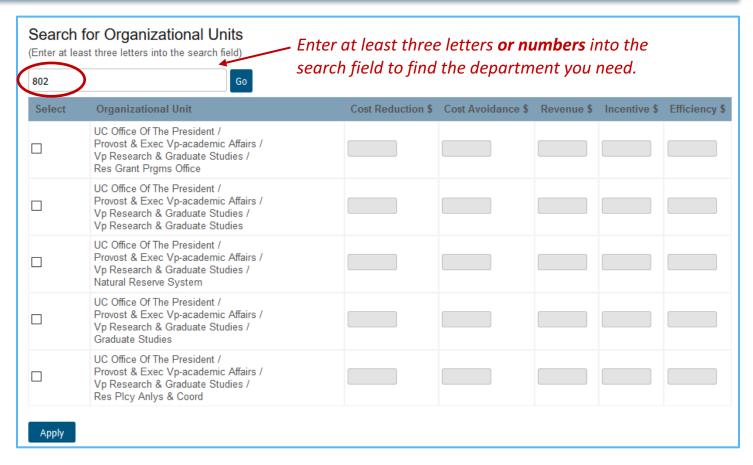
To streamline the Benefit creation process, the "Select Impacted Locations" box will be pre-checked with the user's campus location.

If a Benefit applies to multiple locations, the user will continue to check additional boxes for the applicable locations.

Select Impacted Locations*
☐ UC Berkeley
☐ UC Davis
☐ UC Irvine
☐ UC Los Angeles
☐ UC Merced
UC Office of the President
☐ UC Riverside
☐ UC San Diego
☐ UC San Francisco
☐ UC Santa Barbara
☐ UC Santa Cruz
☐ UC Davis Medical Center
☐ UC Irvine Medical Center
 UC Los Angeles Medical Center
 UC San Diego Medical Center
UC San Francisco Medical Center
☐ UC Systemwide
☐ Other

To streamline the benefit creation process – in Step 2 (Search for Organizational Units), you are now also able to use a department code to find the correct department, which will narrow your search results and speed up the process.





CUT-OFF DATE COLUMN Added to Queues

To assist in tracking benefit cut-off dates, you'll see a new "Cut-Off Date" column added to your queue.

This **column shows the final cut-off date by which this benefit must be submitted and approved** – 10 business days into the following month after the Agreement date.

Displaying 1-7 of 7 results									of 7 results.	
Benefit ID- Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Approver	Status	Selected for Audit	Agreement Date	CutOff Date)
					~	~	~			
18123-18159	Test	0.00	0.00	2424 WILSHIRE EQUITIES LLC		Draft	No	12/13/2017	01/13/2018	D 2 *
18115-18151	Test Benefit UM	2,500.00	2,500.00	FREEWAVE TECHNOLOGIES INC	Test Approver	Resubmitted	No	11/29/2017	12/14/2017	٥
18079-18115	Test UCB	10,000.00	10,000.00	10-S TENNIS SUPPLY	Test Approver	Approved	No	11/21/2017	12/14/2017	٥
18121-18157	Test Project UC	0.00	0.00	FAN VOID-USE @93531 FOR WINSTON BATTERY		Draft	No	11/21/2017	12/14/2017	₽≥*
18077-18113	Test Project	2,500.00	2,500.00	CSNK WORKING CAPITAL FINANCE CORP	Test Approver	Returned	No	11/11/2017	12/14/2017	₽ €

REMINDER HIGHLIGHTS Added to Queues

To help you stay on top of things, benefit activities that need action will be highlighted in red as a reminder.

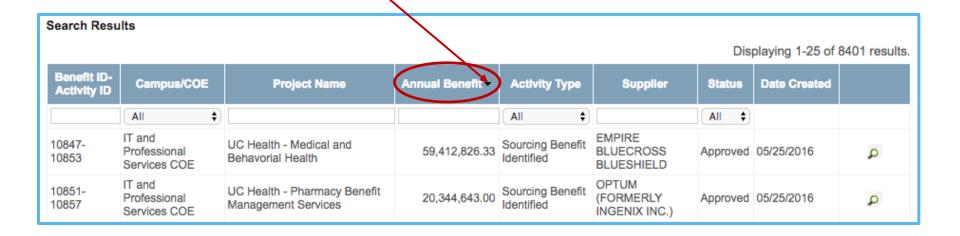
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18077-18113	Test Project	2,500.00	2,500.00	CSNK WORKING CAPITAL FINANCE CORP	Test Approver	Returned	No	11/11/2017	12/14/2017	PP

ANNUAL BENEFITS COLUMN added to Search Results

For easier checking and tracking, you'll find an 'Annual Benefit' column added to Search results.

- This column functions similarly to the 'Annual Benefit' column in your Dashboard
- It is sortable and searchable for all activity types

(<u>NOTE</u>: Clicking on the column headers on your dashboard queues and in search results will sort the results in ascending or descending order.)



YEAR-OVER-YEAR Enhancements

With an added underline, the access to 'Year-Over-Year Benefit' listings displays more clearly as clickable link.

(The next slide shows the screen that will appear when you click on the link...)

FY '18 Benefit by Campus **

Benefit Identified	Target	Approved
UC Berkeley	\$11,200,000	\$6,001,731
UC Davis	\$10,000,000	\$4,976,726
UC Irvine	\$8,500,000	\$5,035,020
UC Los Angeles	\$20,000,000	\$12,463,618
UC Merced	\$1,700,000	\$1,772,643
UC Riverside	\$2,700,000	\$2,213,407
UC San Diego	\$13,000,000	\$4,693,776
UC San Francisco	\$12,100,000	\$14,871,648
UC Santa Barbara	\$3,700,000	\$3,491,383
UC Santa Cruz	\$2,500,000	\$1,111,739
UC Systemwide	\$222,500,000	\$141,936,648
Total	\$307,900,000	\$198,568,339

^{**} Does not include "Missed Benefits" data

YEAR-OVER-YEAR Enhancements

For improved benefit comparison, forecasting and planning, the Year-Over-Year Benefit report now displays three fiscal years simultaneously. Now, you'll see the previous fiscal year, the current fiscal year and the upcoming fiscal year all at once.

<u>Note</u>: When the fiscal year changes on July 1, the fiscal years displayed will update automatically. (*Targets have not currently been set for FY'19.*)

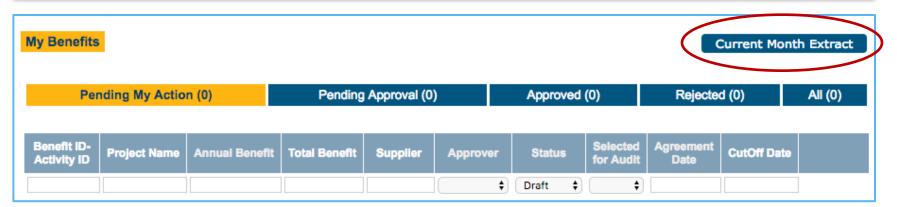
Year Over Year Benefit	(Last FY)		(This F	Y)	(Next FY)		
	FY '17		FY '18		FY	′ '19	
Benefit Identified	Target	Approved	Target	Approved	Target	Approved	
UC Berkeley	\$10,000,000	\$7,150,559	\$11,200,000	\$6,001,731	\$0	\$2,230,851	
UC Davis	\$11,000,000	\$7,937,647	\$10,000,000	\$4,976,726	\$0	\$2,562,502	
UC Irvine	\$6,300,000	\$8,400,528	\$8,500,000	\$5,035,020	\$0	\$3,607,814	
UC Los Angeles	\$14,600,000	\$26,917,957	\$20,000,000	\$12,463,618	\$0	\$6,704,391	
UC Merced	\$3,000,000	\$1,153,257	\$1,700,000	\$1,772,643	\$0	\$885,690	
UC Riverside	\$6,800,000	\$4,064,425	\$2,700,000	\$2,213,407	\$0	\$1,828,276	
UC San Diego	\$12,000,000	\$13,527,046	\$13,000,000	\$4,693,776	\$0	\$2,254,322	
UC San Francisco	\$20,000,000	\$20,758,621	\$12,100,000	\$14,871,648	\$0	\$12,985,649	
UC Santa Barbara	\$3,500,000	\$4,025,861	\$3,700,000	\$3,491,383	\$0	\$3,182,528	
UC Santa Cruz	\$2,000,000	\$3,910,571	\$2,500,000	\$1,111,739	\$0	\$420,797	
UC Systemwide	\$190,800,000	\$199,678,023	\$222,500,000	\$141,936,648	\$0	\$39,320,052	
Total	\$280,000,000	\$297,524,494	\$307,900,000	\$198,568,339	N/A	\$75,982,873	

CURRENT MONTH EXTRACTS Enhancement

For improved individual and campus tracking, all users can now export 'Current Month Extract' reports. These reports:

- Include benefits from the campus(es) associated with that user
- Include benefits from the current month (Ex: An extract created on April 30 will contain benefits with agreement dates of April 1-30; an extract created on May 1, will only show benefits with agreement dates of May 1.)
- Excludes benefits in Draft or Rejected status

To export an MS Excel extract report, use the 'Current Month Extract' button, located in the lower right area of the dashboard, just above the 'Rejected' and 'All' queue buttons.



NOTIFICATION Enhancements

To reduce confusion about which month's benefit cut-off is occurring, notification emails will now include the benefit month in both the subject line and the body of the email:

- "Benefit Bank [benefit month] Cutoff Occurs Soon, ACTION REQUIRED"
- The cutoff date for approving [benefit month's] Benefit Bank entries is just around the corner...

New Subject Line Example

"Benefit Bank October Cutoff Occurs Soon, ACTION REQUIRED"

New Notification Example

"The cutoff date for approving **October's** Benefit Bank entries is just around the corner: November 12, 2017..."

REMINDERS AND RESOURCES

Reminders



Benefit Bank data is loaded into spend analytics



All benefits for a given month must be submitted, reviewed and/or approved within **10 business days** into the following month

Resources

- For more information on Benefit Bank including past release notes, guidelines, training documents and definitions, go to:
 - http://www.ucop.edu/procurement-services/procurement-systems/uc-benefit-training.html
- For assistance, contact the Help Desk: analytics@ucprocure.zendesk.com
- See your Approver with questions and additional support needs