



BENEFIT BANK RELEASE NOTES- SPRINT 10
NOVEMBER 30, 2016

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ALERTS

Submitters will receive a pop-up alert upon login if one or more benefits has been returned and needs action

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

Welcome Nancy Nieblas Dashboard Help Search

FY '17 Benefit by Campus **

Benefit Identified	Target	Approved
UC Davis	\$0	\$302,194
UC Irvine	\$0	\$2,353,963
UC Los Angeles	\$0	\$3,283,829
UC Merced	\$0	\$861,534
UC Riverside	\$0	\$1,916,215
UC San Diego	\$0	\$2,105,825
UC San Francisco	\$0	\$3,968,017
UC Berkeley	\$0	\$5,522,807
UC Santa Barbara	\$0	\$2,383,200
UC Santa Cruz	\$0	\$0
UC Systemwide	\$0	\$0
Total	N/A	

Year Over Year Benefit

** Does not include "Missed Benefits" data

Reminder ✕

You have 2 returned benefits.

[Got it!](#)

My Benefits

Pending My Action (2) | Pending Approval (0) | Approved (143) | Rejected (7) | All (154)

Displaying 1-2 of 2 result(s).

Benefit ID-Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Approver	Status	Selected for Audit	Agreement Date	
11717-11725	UX Test - Benefit 1 for Nancy	1,250.00	1,250.00	AC GENERAL ENGINEERING INC	Rex Chung	Returned	No	07/06/2016	
11719-11727	UX Test - Benefit 2 for Nancy	250.00	250.00	BODEGA BAY PUBLIC UTILITY DISTRICT	Rex Chung	Returned	No	07/06/2016	

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HIGHLIGHTED ACTIVE BENEFIT QUEUE

After login, the screen defaults to a highlighted benefit queue to inform the user which queue they are actively in

Old Dashboard

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Welcome Erin Riley

FY '17 Benefit by Campus **

Benefit Identified	Target	Approved
UC Davis	\$11,000,000	\$9,844,516
UC Irvine	\$6,300,000	\$3,825,608
UC Los Angeles	\$14,600,000	\$11,366,505
UC Merced	\$3,000,000	\$893,241
UC Riverside	\$6,800,000	\$2,378,482
UC San Diego	\$12,000,000	\$4,049,422
UC San Francisco	\$20,000,000	\$6,001,159
UC Berkeley	\$10,000,000	\$5,982,851
UC Santa Barbara	\$3,500,000	\$3,046,318
UC Santa Cruz	\$2,000,000	\$424,182
UC Systemwide	\$190,800,000	\$144,357,517
Total	\$280,000,000	\$192,169,801

Year Over Year Benefit

** Does not include "Missed Benefits" data

My Benefits | My Approver Queue | My UC Admin Queue

Draft (2) | Pending Approval (0) | Returned to Me (0) | Resubmitted (0) | Approved (0) | Rejected (0) | All (2)

Displaying 1-2 of 2 result(s).

Benefit ID-Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Approver	Status	Selected for Audit	Agreement Date
1-1	Test for Draft	500.00	500.00	SYSCO CORP	Justin Sullivan	Draft	No	06/10/2015
6839-6843	Office Max proposed increased	100,000.00	300,000.00	OFFICE MAX	Jason Hall	Draft	No	07/17/2015

New Dashboard

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Welcome Andrea Tung

FY '17 Benefit by Campus **

Benefit Identified	Target	Approved
UC Davis	\$0	\$302,194
UC Irvine	\$0	\$2,353,963
UC Los Angeles	\$0	\$3,283,829
UC Merced	\$0	\$861,534
UC Riverside	\$0	\$1,916,215
UC San Diego	\$0	\$2,105,825
UC San Francisco	\$0	\$3,968,017
UC Berkeley	\$0	\$5,522,807
UC Santa Barbara	\$0	\$2,383,200
UC Santa Cruz	\$0	\$103,854
UC Systemwide	\$0	\$134,560,885
Total	N/A	\$157,362,323

Year Over Year Benefit

** Does not include "Missed Benefits" data

My Benefits | My Approver Queue

Pending My Action (1) | Pending Approval (1) | Approved (0) | Rejected (0) | All (3)

Displaying 1-1 of 1 result(s).

Benefit ID-Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Approver	Status	Selected for Audit	Agreement Date
11769-11773	Project Y	750.00	1,000.00	JANTZ CAFE & BAKERY	Erin Riley	Returned	No	09/21/2016

BENEFIT QUEUE UPDATE

The Submitters and Approvers queues have been consolidated for ease of management

Submitter

- ✓ 'Draft' queue & 'Returned to Me' queue are now combined to 'Pending my Action'

Draft (0)	Pending Approval (0)	Returned to Me (0)	Resubmitted (0)	Approved (3)
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Pending My Action (1)	Pending Approval (1)	Approved (0)
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- ✓ 'Pending Approval' queue & 'Resubmitted' queue are now combined to 'Pending Approval'

Draft (0)	Pending Approval (0)	Returned to Me (0)	Resubmitted (0)	Approved (3)
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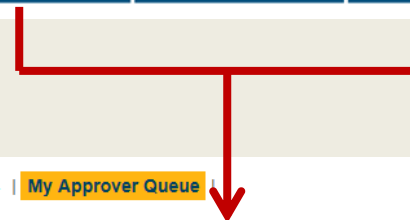


Pending My Action (1)	Pending Approval (1)	Approved (0)
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Approver

- ✓ 'Pending Approval' queue & 'Resubmitted' queue are now combined to 'Pending my Approval'

Draft (0)	Pending Approval (0)	Returned to Me (0)	Resubmitted (0)
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My Benefits	My Approver Queue
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Pending My Approval (0)	Returned (0)
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ADDING AN ACTIVITY TO A BENEFIT- “Layering”

Submitters can associate one or more additional benefits to a previously approved benefit

Use Case Examples

1. Contract Extension

UC signs a three (3) year contract with two (2) one-year extensions. The Benefit was originally entered for three years. At the end of the three years, UC exercises a one (1) year extension. A “layer” would be added onto the original Benefit to show the additional Benefit generated as a result of the one-year extension.

2. Fiscal Year Benefit Amounts Vary


UC signs a three (3) year contract for pouring rights with Pepsi. Pepsi offers different incentive programs in each of the three years of the contract, which results in different annual Benefit amounts. The submitter would add the year one Benefit amount, and then after approval, layer on year two and then year three to reflect the different annual Benefit amounts.

ADDING AN ACTIVITY TO A BENEFIT- “Layering”


My Benefits | **My Approver Queue**


Pending My Action (1) | Pending Approval (1) | **Approved (1)** | Rejected (0) | All (4)

Displaying 1-1 of 1 result(s).

Benefit ID-Activity ID	Project Name	Annual Benefit	Total Benefit	Supplier	Approver	Status	Selected for Audit	Agreement Date	
11773-11779	Project ABC	7,000.00	7,000.00	JANIS RESEARCH CO	Erin Riley	Approved	No	10/26/2016	

To layer an activity:

1. Find your original benefit and open using 

 **Attachments**

Document	Type	Actions
baseball_2.jpg	Invoice	view

Comments

Save Comment

User	Comment	Action	Date
Andrea Tung	-new benefit-	Draft	2016-10-26 11:16:09
Andrea Tung	-submitted by submitter-	Submitted	2016-10-26 11:20:44
Erin Riley	ok	Approved	2016-10-26 11:42:57
Erin Riley	ok	Approved	2016-10-26 11:43:02

Actions

Status: Approved

Add Activity

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2. Use the 'Add Activity' button to create your new layer

ADDING AN ACTIVITY TO A BENEFIT- “Layering”

3. Enter new layer information
Note: Some fields will not be editable

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Welcome Jacquelyn Johnson

Step 1 - Adding Activity

Fields with * are required.

Project Name * Submitters notification

UC Category * Financial and Insurance Services

Supplier *

Baseline Type * Select a Baseline Type...

Total Baseline Cost Amount *

Activity * Select an Activity...

Select Impacted Locations *

- UC Davis
- UC Irvine
- UC Los Angeles
- UC Merced
- UC Office of the President
- UC Riverside
- UC San Diego
- UC San Francisco
- UC Berkeley
- 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

Cancel Save and Next

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4. After information is entered, click on ‘Submit for Approval’

Benefit Organizational Units Attachments Preview

Step 4 - Preview

[Edit]

Status: 11/73-11/81

Benefit ID: 10/26/2016

Date Created: Andrea Tung

Submitter: Erin Riley

Approver: Sourcing Benefit Identified

Activity: Project ABC

Project Name: Building Construction

UC Category: JANIS RESEARCH CO

Supplier: Previously contracted

Baseline Type: \$2,000.00

Total Baseline Amount: \$2,300.00

Total Benefit Amount: \$2,300.00

Annual Baseline Amount: \$2,300.00

Annual Benefit Amount: 10

Duration in Months: 115%

Yield: UCR 100%

Impacted Locations: 10/28/2016

Agreement Date: 1300

Agreement ID:

Benefit Notes

No notes entered.

Organizational Units

Organizational Unit	Cost Reduction	Cost Avoidance	Revenue	Incentive	Efficiency	Total
UCR->Building Maintenance & Ops	-	2,300.00	-	-	-	2,300.00
UCR->Totals	-	2,300.00	-	-	-	2,300.00
Organizational Unit Totals	-	2,300.00	-	-	-	2,300.00

Attachments

Document	Type	Actions
audit.jpg	Contract	view

Save as Draft Submit for Approval

ADDING AN ACTIVITY TO A BENEFIT- “Layering”

Benefits can now be added up to a duration of 35 years!

Review Benefit

Status:	Approved
Benefit ID:	11773-11779
Date Created:	10/26/2016
Submitter:	Andrea Tung
Approver:	Erin Riley
Activity:	Sourcing Benefit Identified
Project Name:	Project ABC
UC Category:	Building Construction
Supplier:	JANIS RESEARCH CO
Baseline Type:	Previously contracted
Total Baseline Amount:	\$50,000.00
Total Benefit Amount:	\$7,000.00
Annual Baseline Amount:	\$50,000.00
Annual Benefit Amount:	\$7,000.00
Duration in Months:	12
Yield:	14%
Impacted Locations:	UCR 100%
Agreement Date:	10/26/2016
Agreement ID:	1299

Associated Activities

▶ [11773-11781] Sourcing Benefit Identified

The Submitter or Approver can click on any hyperlinked activity to navigate to other layers of the Benefit to view key details

Associated Activities

▼ [11773-11781] Sourcing Benefit Identified

[View Activity](#)

Status:	Submitted
Benefit ID:	11773-11781
Date Created:	10/26/2016
Submitter:	Andrea Tung
Approver:	Erin Riley
Activity:	Sourcing Benefit Identified
Project Name:	Project ABC
UC Category:	Building Construction
Supplier:	JANIS RESEARCH CO
Baseline Type:	Previously contracted
Total Baseline Amount:	\$ 2,000.00
Total Benefit Amount:	\$ 2,300.00
Annual Baseline Amount:	\$ 2000.00
Annual Benefit Amount:	\$ 2300.00
Duration in Months:	10
Yield:	115.00%
Impacted Locations:	UCR 100%
Agreement Date:	10/26/2016
Agreement ID:	1300

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/procurementservices/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