



# **BENEFIT BANK RELEASE NOTES DECEMBER 2017**

# ENHANCEMENTS DIRECTORY






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# NAVIGATION Enhancements

**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).

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

| Pending Approval (54)  |                                  | Returned (14)  |               | Approved (7844)           |                   | Rejected (558)   |             | All (8470)         |                |   |
|--|----------------------------------|----------------|---------------|---------------------------|-------------------|------------------|-------------|--------------------|----------------|---|
| Displaying 1-25 of 8470 results.   |                                  |                |               |                           |                   |                  |             |                    |                |   |
| Go to page: << First < Previous <b>1</b> 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     |    |
| 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     |  |
| 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     |  |
| 18115-18151  | Test Benefit UM                  | 2,500.00       | 2,500.00      | FREEWAVE TECHNOLOGIES INC | Test Submitter    | Test Approver    | Resubmitted | No                 | 11/29/2017     |  |
| 18063-18099  | Proc 571- report                 | 5.00           | 5.00          | BOYS & GIRLS CLUB         | Jacquelyn Johnson | Justin Sullivan  | Submitted   | No                 | 11/28/2017     |  |



# NAVIGATION Enhancements

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).

## Search Benefits

### Search Results

Displaying 1-25 of 8401 results.

| Benefit ID-Activity ID | Campus/COE | Project Name                            | Annual Benefit | Activity Type                    | Supplier          | Status   | Date Created |  |
|------------------------|------------|---|----------------|----------------------------------|-------------------|----------|--------------|--|
|                        | All        |   |                | All                              |                   | All      |              |  |
| 5-5                    | UCSD       | AP&M to Mandeville Center fiber install | 1,021.50       | Transactional Benefit Identified | TEL TECH PLUS     | Approved | 07/15/2014   |   |
| 7-7                    | UCSD       | Mandell Weiss to Potiker fiber install  | 2,915.27       | Transactional Benefit Identified | BERGELECTRIC CORP | Approved | 07/15/2014   |  |



# NAVIGATION Enhancements

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 |  |
| 67-67 | UCSF | Care Ecosystem RFP  | 1,399,944.00 | Sourcing Benefit Identified      | SUBAWARD-UCSF | Approved | 07/16/2014 |  |
| 69-69 | UCSC | ITS Instrutional Computing Lab                                    | 898.45       | Transactional Benefit Identified | DELL INC      | Approved | 07/16/2014 |  |

Go to page: << First < Previous 1 2 3 4 5 6 7 8 9 10 Next > Last >>

Easier navigation!

# NAVIGATION Enhancements

One less entry step!

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

# NAVIGATION Enhancements

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.

Speeds up process!

Search for Organizational Units  
(Enter at least three letters into the search field)

802

*Enter at least three letters or numbers into the search field to find the department you need.*











| Select                   | Organizational Unit  | Cost Reduction \$    | Cost Avoidance \$    | Revenue \$           | Incentive \$         | Efficiency \$        |
|--------------------------|--|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="checkbox"/> | UC Office Of The President /<br>Provost & Exec Vp-academic Affairs /<br>Vp Research & Graduate Studies /<br>Res Grant Prgms Office         | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | UC Office Of The President /<br>Provost & Exec Vp-academic Affairs /<br>Vp Research & Graduate Studies /<br>Vp Research & Graduate Studies | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | UC Office Of The President /<br>Provost & Exec Vp-academic Affairs /<br>Vp Research & Graduate Studies /<br>Natural Reserve System         | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | UC Office Of The President /<br>Provost & Exec Vp-academic Affairs /<br>Vp Research & Graduate Studies /<br>Graduate Studies               | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | UC Office Of The President /<br>Provost & Exec Vp-academic Affairs /<br>Vp Research & Graduate Studies /<br>Res Plcy Anlys & Coord         | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

# 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.









| 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  |          |
| 18115-18151            | Test Benefit UM | 2,500.00       | 2,500.00      | FREEWAVE TECHNOLOGIES INC               | Test Approver | Resubmitted | No                 | 11/29/2017     | 12/14/2017  |    |
| 18079-18115            | Test UCB        | 10,000.00      | 10,000.00     | 10-S TENNIS SUPPLY                      | Test Approver | Approved    | No                 | 11/21/2017     | 12/14/2017  |    |
| 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.

Displaying 1-7 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  |       |
| 18115-18151            | Test Benefit UM | 2,500.00       | 2,500.00      | FREEWAVE TECHNOLOGIES INC               | Test Approver | Resubmitted | No                 | 11/29/2017     | 12/14/2017  |    |
| 18079-18115            | Test UCB        | 10,000.00      | 10,000.00     | 10-S TENNIS SUPPLY                      | Test Approver | Approved    | No                 | 11/21/2017     | 12/14/2017  |    |
| 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  |   |

# 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

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

## Search Results

Displaying 1-25 of 8401 results.

| Benefit ID-Activity ID | Campus/COE                       | Project Name                                     | Annual Benefit | Activity Type               | Supplier                      | Status   | Date Created |   |
|------------------------|----------------------------------|--|----------------|-----------------------------|-------------------------------|----------|--------------|---|
|                        | All ▾                            |  |                | All ▾                       |                               | All ▾    |              |   |
| 10847-10853            | IT and Professional Services COE | UC Health - Medical and Behavioral Health        | 59,412,826.33  | Sourcing Benefit Identified | EMPIRE BLUECROSS BLUESHIELD   | Approved | 05/25/2016   |  |
| 10851-10857            | IT and Professional Services COE | UC Health - Pharmacy Benefit Management Services | 20,344,643.00  | Sourcing Benefit Identified | OPTUM (FORMERLY INGENIX INC.) | Approved | 05/25/2016   |  |

# 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        |
| <b>Total</b>                                  | <b>\$307,900,000</b> | <b>\$198,568,339</b> |
| <u><a href="#">Year Over Year Benefit</a></u> |                      |                      |

\*\* 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.

Note: 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 FY)            |                      | (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        |
| <b>Total</b>           | <b>\$280,000,000</b> | <b>\$297,524,494</b> | <b>\$307,900,000</b> | <b>\$198,568,339</b> | <b>N/A</b> | <b>\$75,982,873</b> |

# 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.

The screenshot shows a dashboard titled 'My Benefits'. At the top right, there is a button labeled 'Current Month Extract' which is circled in red. Below this are five tabs: 'Pending My Action (0)', 'Pending Approval (0)', 'Approved (0)', 'Rejected (0)', and 'All (0)'. Below the tabs is a table with the following columns: Benefit ID-Activity ID, Project Name, Annual Benefit, Total Benefit, Supplier, Approver, Status, Selected for Audit, Agreement Date, and CutOff Date. The 'Status' column is currently set to 'Draft'.

| Benefit ID-Activity ID | Project Name | Annual Benefit | Total Benefit | Supplier | Approver | Status | Selected for Audit | Agreement Date | CutOff Date |
|------------------------|--------------|----------------|---------------|----------|----------|--------|--------------------|----------------|-------------|
|                        |              |                |               |          |          | Draft  |                    |                |             |

# 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](mailto:analytics@ucprocure.zendesk.com)



See your Approver with questions and additional support needs