Quick Reference Guide

Reporting on Actualized & Projected Benefits

Introducing a new element called **Reporting Type** for more detailed reporting of our benefit achievements. A benefit's **Reporting Type** can be **Actualized** or **Projected** and is determined, in most cases, by the benefit itself.

Actualized Benefit is used when the benefit has an absolute value: it is *not* an estimate.

Examples include: single procurement transaction or a professional services fixed fee engagement

Projected Benefit is used when the benefit is a *good estimate* based on past behavior and known future conditions.

Examples include: sourcing event with a market basket of goods

To capture this additional data in Benefit Bank, two check boxes have been introduced. These boxes will be selected by default, based on the selection in the **Activity** drop-down box. However, the default choice may not be the accurate choice in every situation. Please confirm that your **Reporting Type** meets the criteria for the benefit.

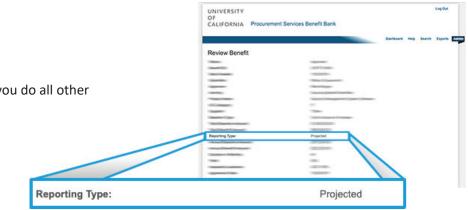
Benefi	C Organizational Units	Allachments	Activity * Reporting Type *	Transactional Benefit Identified
Step 1 - Add a Benefit		Reporting type "		
Fields with " are required.			When you select Transactional Benefit Identified	
Project Name *			Select Impacted Locations*	
UC Category*	Select a Category		SUCBerkeley DUCDarks	from the Activity drop down, the Actualized box will default as your Reporting Type selection. Please change this selection if the default choice isn't
Supplier*			DUC Ionne DUC Los Angeles	
Baseline Type *	Select a Baseline Type	~	UC Merced	
Total Baseline Cost Amount 1		UC Office of the President	accurate for your situation.	
Activity*	Select an Activity	¥	UC San Diego	
Reporting Type *	Actualized Projected		UC San Francisco UC Santa Barbara	
Each reporting type represents one benefit activity		DUC Santa Cruz		
		Activity *	Sourcing Benefit Identified	
			Reporting Type *	Actualized Projected
			C CC Systemator	
Cancel Save and Next			2019 The Regents of the University of California	When you select Sourcing Benefit Identified from the Activity drop down, the Projected box will default as your Reporting Type selection. Please confirm that

That's the big change. Simple right?

The rest of the steps for entering a benefit remain the same.

For Benefit approvers:

Please be sure to review this selection, as you do all other benefit details, prior to approval.



this selection is correct.