## 1. CSS B&FS: Number of New and Completed Transactions by Month - Trending

Month	New Transactions	Completed Transactions - Procurement	Completed Transactions - T&E Reimbursement	Completed Transactions - Grand Total
Mar-15	16,286	11,970	3,699	15,669
Apr-15	18,378	12,185	4,848	17,033
May-15	17,053	11,920	4,444	16,364
Jun-15	17,934	13,153	4,764	17,917
Jul-15	15,664	12,162	3,411	15,573
Aug-15	14,476	11,201	2,613	13,814
Sep-15	14,295	11,445	2,848	14,293
Oct-15	16,584	12,578	4,004	16,582
Nov-15	13,874	10,080	3,734	13,814
Dec-15	12,414	8,923	3,453	12,376
Jan-16	12,181	9,263	2,844	12,107
Feb-16	14,999	11,340	3,627	14,967
Mar-16	16,609	12,292	4,259	16,551
Apr-16	16,817	11,867	4,616	16,483
May-16	16,457	12,052	4,896	16,948
Jun-16	16,677	12,899	4,042	16,941
Jul-16	14,591	11,564	2,983	14,547
Aug-16	16,085	13,141	2,840	15,981

Summary

● As of July 2016 Team 2 volume is included in completed Procurement transaction count.

● May 2016 T&E volume is a CSS record high.

● Implementation of all units completed in March 2015, including proportionally high T&E volume units (Art s& Humanities, Law, & Library).
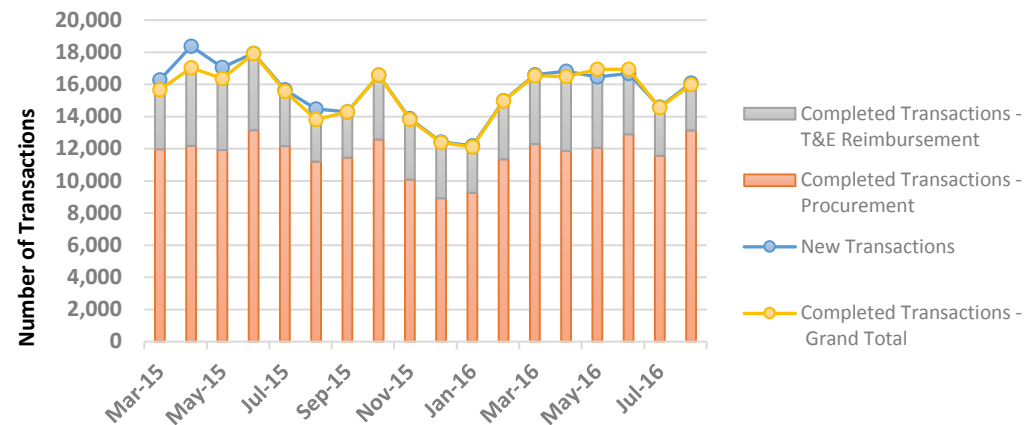
2. CSS B&FS: Average Days to Completion by Month - Trending

| Month	Average Days - Procurement	Average Days - T&E Reimbursement	Average Days - Grand Total
Mar-15	2.7	6.3	3.5
Apr-15	2.8	5.8	3.7
May-15	2.8	5.5	3.6
Jun-15	3.3	6.3	4.1
Jul-15	3.1	5.2	3.6
Aug-15	2.9	5.5	3.4
Sep-15	2.8	4.2	3.1
Oct-15	2.9	4.6	3.3
Nov-15	3.0	5.0	3.6
Dec-15	3.3	4.8	3.7
Jan-16	3.8	6.3	4.4
Feb-16	3.1	5.3	3.6
Mar-16	3.0	5.0	3.5
Apr-16	2.9	5.3	3.7
May-16	3.2	6.1	4.0
Jun-16	3.4	6.9	4.2
Jul-16	3.0	7.1	3.9
Aug-16	3.2	6.1	3.7

Summary

● T&E reimbursements continue to be processed comparably to this time last year.
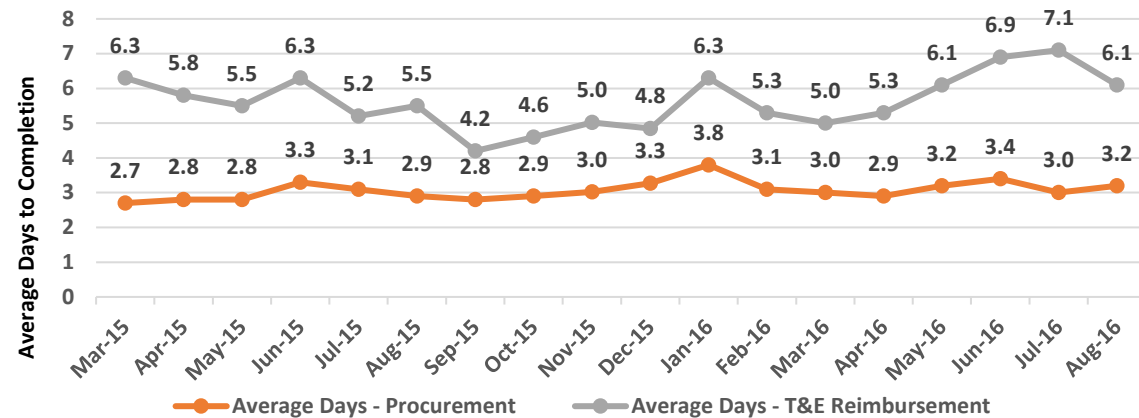
3. **CSS B&FS: Number of Completed Transactions by Days to Completion**
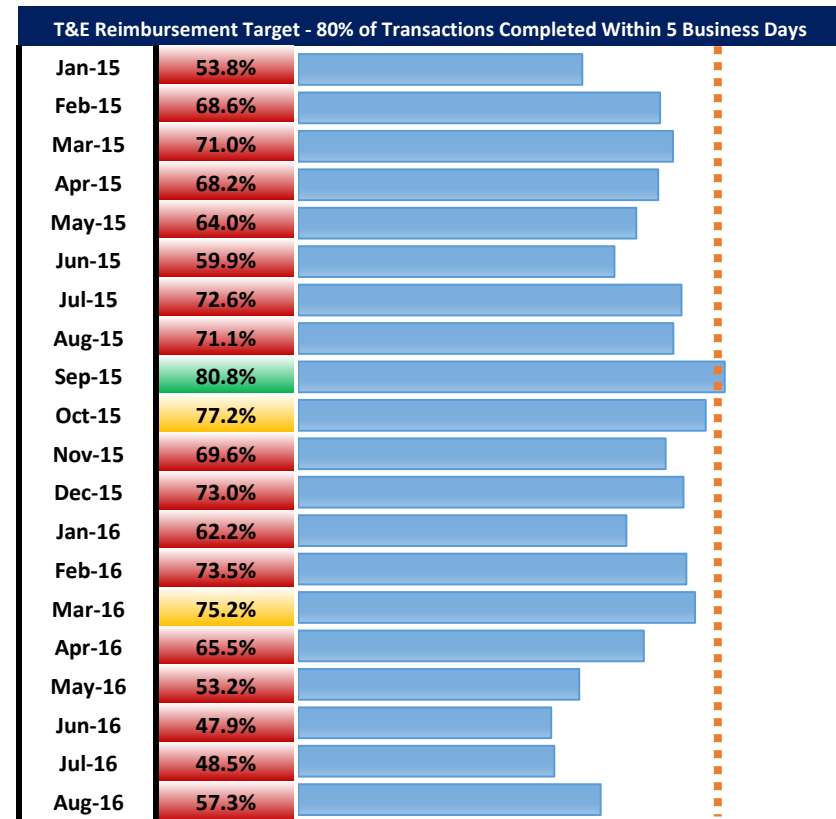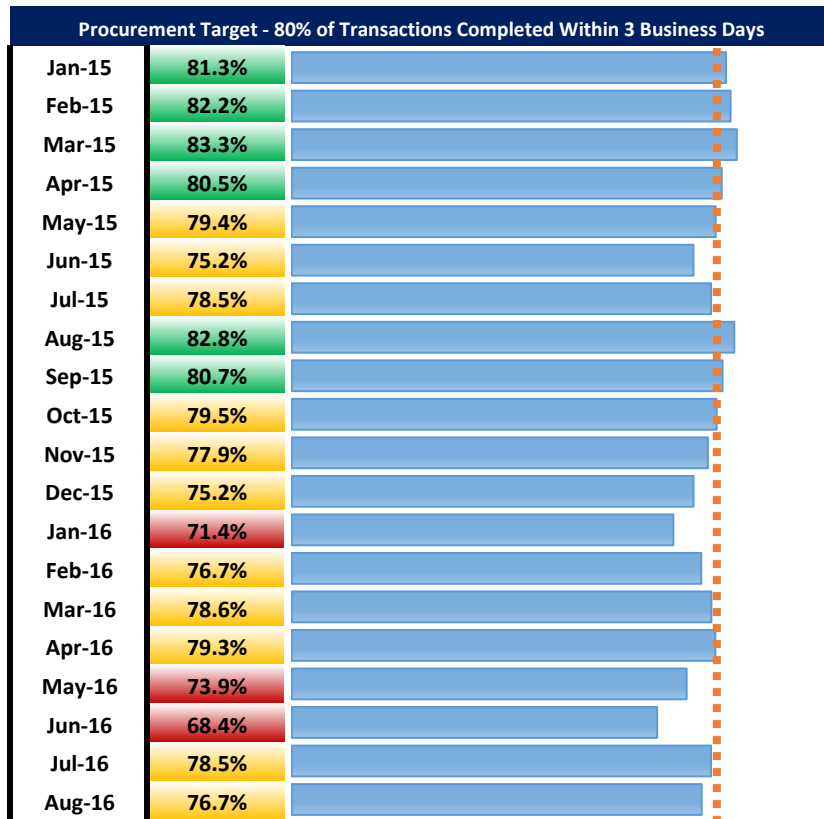
Procurement

Travel & Entertainment Reimbursement

Berkeley Campus Shared Services
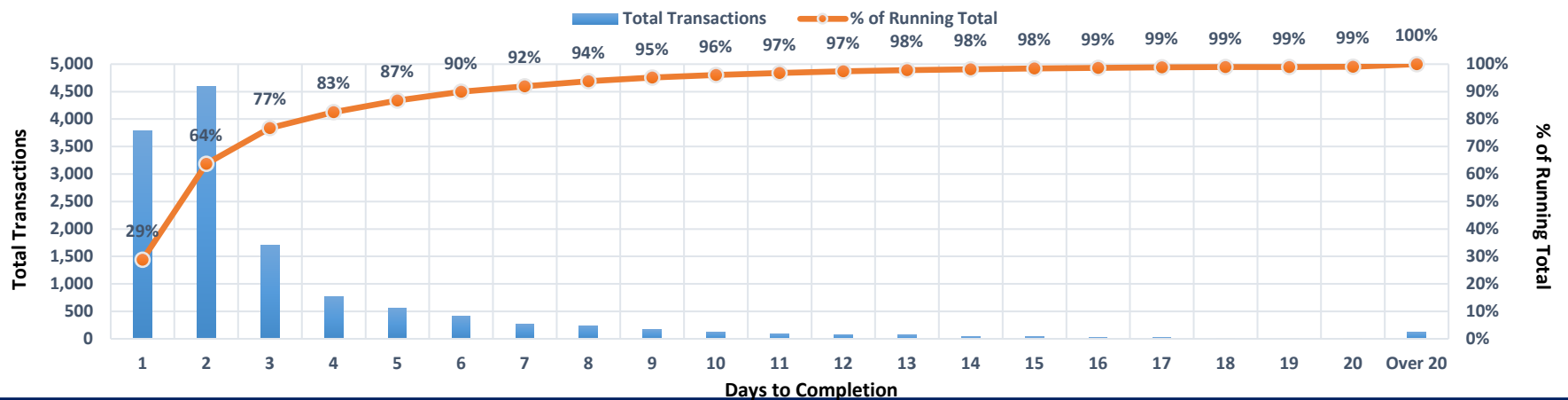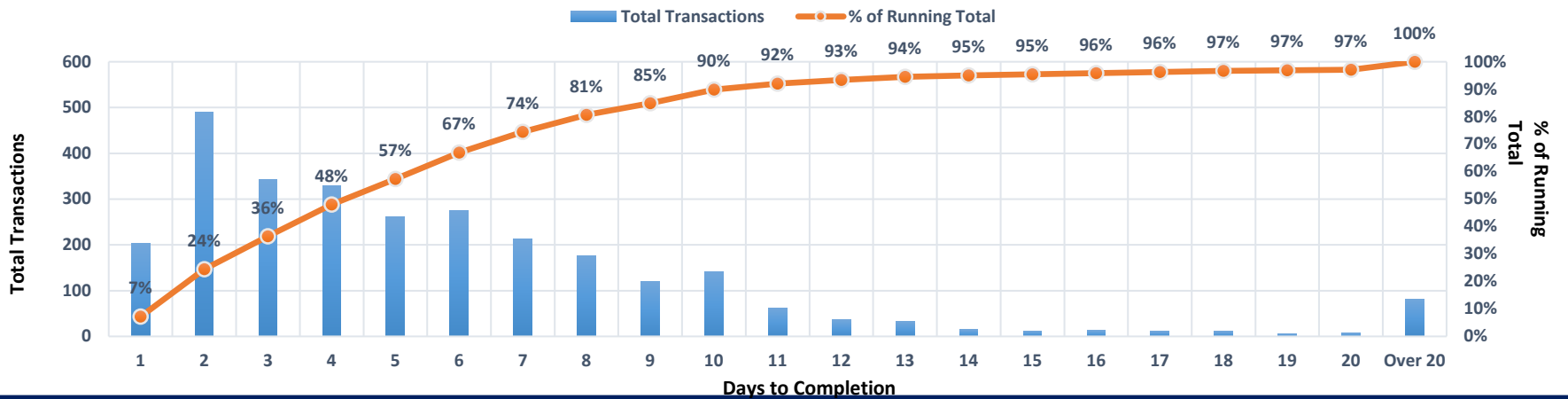
4. **CSS B&FS: Key Performance Indicator (KPI) - % of Transactions Completed Within Target of Goal**

Procurement Target - 80% of Transactions Completed Within 3 Business Days	
Jan-15	81.3%
Feb-15	82.2%
Mar-15	83.3%
Apr-15	80.5%
May-15	79.4%
Jun-15	75.2%
Jul-15	78.5%
Aug-15	82.8%
Sep-15	80.7%
Oct-15	79.5%
Nov-15	77.9%
Dec-15	75.2%
Jan-16	71.4%
Feb-16	76.7%
Mar-16	78.6%
Apr-16	79.3%
May-16	73.9%
Jun-16	68.4%
Jul-16	78.5%
Aug-16	76.7%

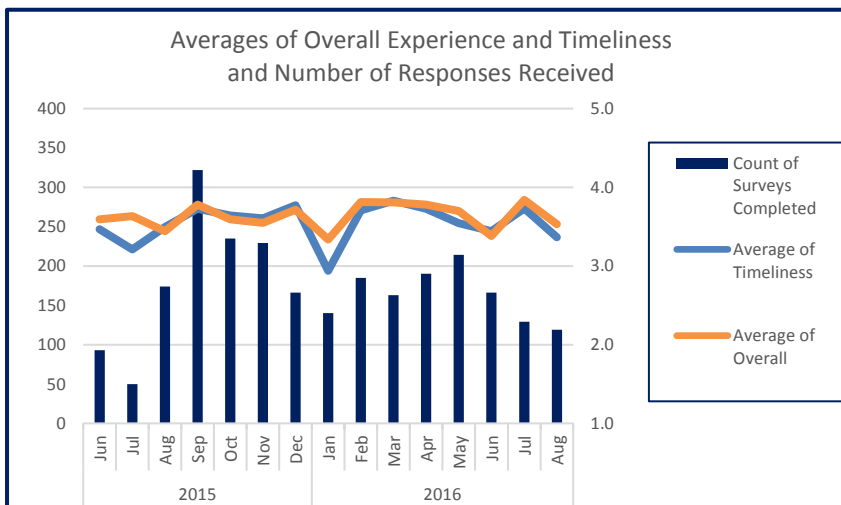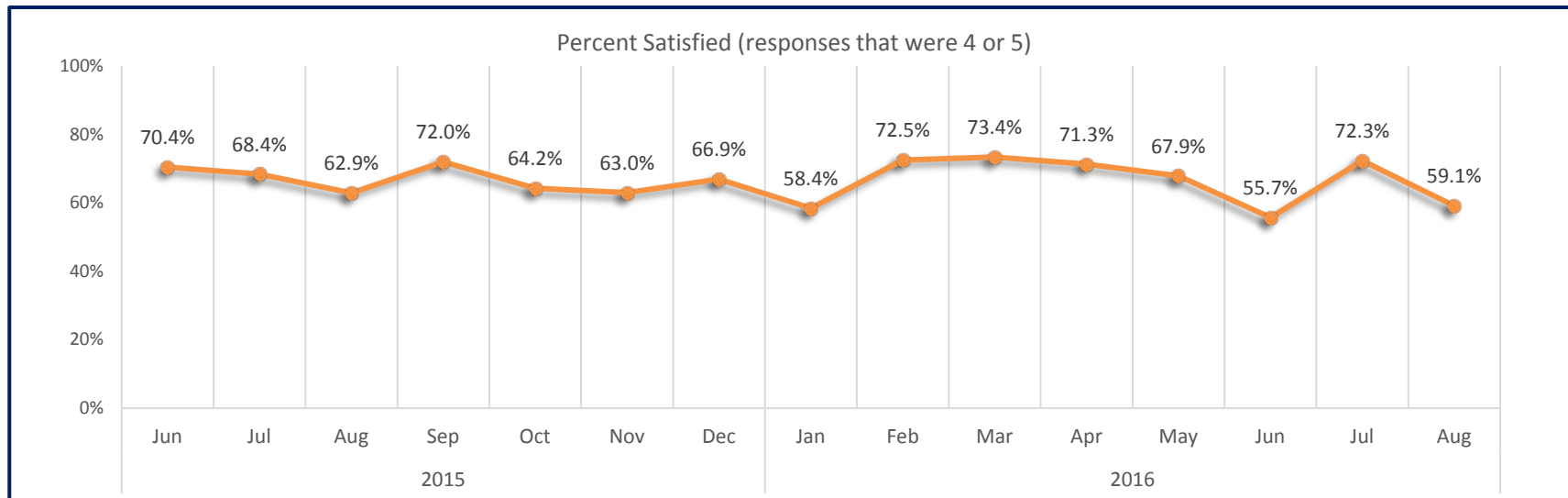| T&E Reimbursement Target - 80% of Transactions Completed Within 5 Business Days	
Jan-15	53.8%
Feb-15	68.6%
Mar-15	71.0%
Apr-15	68.2%
May-15	64.0%
Jun-15	59.9%
Jul-15	72.6%
Aug-15	71.1%
Sep-15	80.8%
Oct-15	77.2%
Nov-15	69.6%
Dec-15	73.0%
Jan-16	62.2%
Feb-16	73.5%
Mar-16	75.2%
Apr-16	65.5%
May-16	53.2%
Jun-16	47.9%
Jul-16	48.5%
Aug-16	57.3%

Summary

● The indicators of Procurement transactions at 80% within 3 business days and T&E transactions at 80% within 5 business days are targets that CSS is striving to achieve through continuous improvement, process transformation, and training.

Key	Procurement	T&E
	80% or Greater	80% or Greater
	75% to 80%	75% to 80%
	Less than 75%	Less than 75%
	Service Achieved	Service Achieved
•	Service Target	Service Target

5. CSS B&FS: Travel & Entertainment Reimbursement Overall Customer Satisfaction (Rated on a scale of 1 - 5)

Percent Satisfied (responses that were 4 or 5)

Averages of Overall Experience and Timeliness and Number of Responses Received

- Count of Surveys Completed
- Average of Timeliness
- Average of Overall

Summary

Overall experience satisfaction scores track closely with perception of timeliness. It is likely that delays in processing due to the BFS system shutdown, and holidays more broadly, contributed to the decline in satisfaction shown in January.

Survey issued by CSS has been retired and replaced by an exsisting survey sent by Accounts Payable to all travellers. The survey is responded to in greater numbers and is focused on the end recipient, whereas the previous survey was generated only for those who entered transactions in Bear Buy.

Glossary of Terms

Month - New Transactions
The month in which a transaction was submitted by the customer. This transaction may not be completed in the same month.

Month - Completed Transactions
The month in which a transaction was completed, irrespective of when the transaction was first submitted by the customer.

Days to Completion
Measured in business days (excludes weekends and all campus holiday and curtailment days). This measurement is currently only a representation of CSS-owned processing timeframes.

Category
Procurement - All non "Campus Shared Services" forms.
T&E - Only the "Campus Shared Services" form and applies to only T&E reimbursement requests.

% of Running Total
This measurement shows how often a transaction was completed within X amount of days.