BENEFIT BANK APPROVER TRAINING
Introduction

• Thank you for joining today’s training!
• Today’s Agenda
Benefit Bank Approver Training

The purpose of this session is to familiarize you with how to review and approve benefits using the Benefit Bank.

• Today’s agenda includes:
  – Background
  – Changes from the previous process
  – Demo
  – What you need to know

• After this session, you’ll know....
  ....how to approve benefits
  ....where to go for support
  ....how to get started

Questions can be submitted in ReadyTalk using the chat feature
• Last November, a new methodology was rolled out for tracking Procurement Benefit across the UC system

• An interim tool was launched that involved the use of SharePoint and Excel worksheets

A new tool is now ready that make the process of tracking easier and faster.
## Contents

- Introduction

- Changes from Previous Process

- About the Benefit Bank

- Demo

- What You Need to Know
Changes from Previous Process

Several improvements have been made over the previous process.

<table>
<thead>
<tr>
<th>Action</th>
<th>Old Process</th>
<th>Benefit Bank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit data entry</td>
<td>Involved collecting multiple Excel sheets</td>
<td>Entirely done by buyers within the tool</td>
</tr>
<tr>
<td>Submittal timing</td>
<td>Once a month</td>
<td>Real time submittal within the tool</td>
</tr>
<tr>
<td>Benefit review</td>
<td>Coordinated over email</td>
<td>Automatically routed to you for approval</td>
</tr>
<tr>
<td>Increased visibility</td>
<td>Campus Benefit totals not easily available</td>
<td>Benefit totals updated and viewable upon approval</td>
</tr>
</tbody>
</table>
What’s Not Changing

Despite changes to the way you’ll track benefit, the methodology will remain the same.

• All aspects of the benefit methodology remain the same, including:
  – Benefit definitions
  – Baseline definitions
  – Calculations

• Importantly, these aspects also remain the same:
  – All Procurement Benefit needs to be logged
  – Any Benefit >$1,000 needs supporting documentation
  – Approval of Benefits by campus and COE leadership
Contents

• Introduction
• Changes from Previous Process
  • About the Benefit Bank
• Demo
• What You Need to Know
About the Benefit Bank

• What is it?
  – The Benefit Bank is a web-based application designed to track, validate and report Benefits from Procurement activity across the UC system

• How does it work?
  – Anytime a purchase is made or a sourcing event is completed that results in a cost reduction, cost avoidance, incentive, or revenue, an entry should be logged into the Benefit Bank
  – The Benefit Bank keeps track of when Benefit is submitted, Benefit duration, which campus(es) are impacted, and how UC is doing compared to P200 Benefit goals

• Who will use it?
  – Everyone in campus Procurement/Materiel Management organizations who execute purchases or sourcing events
Benefit Bank Homepage
Benefit Bank Dashboard

**Benefit by Campus**

- UC Berkeley: $1,003,892
- UC Davis: $4,000,000
- UC Irvine: $20,000
- UC Los Angeles: $1,000,011
- UC Merced: $1,175,319
- UC Riverside: $1,000
- UC San Diego: $1,007,500
- UC San Francisco: $0
- UC Santa Barbara: $1,000,000
- UC Santa Cruz: $1,000,701
- UC Office of the President: $5,000
- **Total**: $10,213,423

**My Approver Queue** | **My Proxy Queue**

- Pending My Approval: 1
- Returned: 0
- Resubmitted: 0
- Approved: 0
- Rejected: 0
- **All**: 1

*Log Out*
### Benefit Bank – Queue

#### My Approver Queue | My Proxy Queue

<table>
<thead>
<tr>
<th>Benefit ID</th>
<th>Activity ID</th>
<th>Project Name</th>
<th>Activity Type</th>
<th>Supplier</th>
<th>Status</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>299</td>
<td>301</td>
<td>Science &amp; Engineering 2 building – network equipment</td>
<td>Transactional Benefit Identified</td>
<td>NEXUS IS</td>
<td>Submitted</td>
<td>07/15/2014</td>
</tr>
<tr>
<td>301</td>
<td>303</td>
<td>Science &amp; Engineering 2 building – network equipment</td>
<td>Transactional Benefit Identified</td>
<td>NEXUS IS</td>
<td>Submitted</td>
<td>07/15/2014</td>
</tr>
<tr>
<td>303</td>
<td>305</td>
<td>Science &amp; Engineering 2 building – network equipment</td>
<td>Transactional Benefit Identified</td>
<td>NEXUS IS</td>
<td>Submitted</td>
<td>07/15/2014</td>
</tr>
<tr>
<td>305</td>
<td>307</td>
<td>Science &amp; Engineering 2 building – network equipment</td>
<td>Transactional Benefit Identified</td>
<td>NEXUS IS</td>
<td>Submitted</td>
<td>07/15/2014</td>
</tr>
<tr>
<td>297</td>
<td>299</td>
<td>Erin Test</td>
<td>Transactional Benefit Identified</td>
<td>A T STILL UNIV OF HEALTH SCIENCES INC</td>
<td>Rejected</td>
<td>07/15/2014</td>
</tr>
</tbody>
</table>
Benefit Bank – Review Benefit

Review Benefit

<table>
<thead>
<tr>
<th>Benefit ID</th>
<th>299</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Transactional Benefit Identified</td>
</tr>
<tr>
<td>Project</td>
<td>Science &amp; Engineering 2 building – network equipment</td>
</tr>
<tr>
<td>Category</td>
<td>IT</td>
</tr>
<tr>
<td>Supplier</td>
<td>NEXUS IS</td>
</tr>
<tr>
<td>Total Benefit Amount</td>
<td>$ 11309.00</td>
</tr>
<tr>
<td>Total Baseline Amount</td>
<td>$ 105,229.00</td>
</tr>
<tr>
<td>Campus Distribution</td>
<td>UCM 100%</td>
</tr>
<tr>
<td>Agreement Date</td>
<td>07/17/2014</td>
</tr>
<tr>
<td>Date Created</td>
<td>07/15/2014</td>
</tr>
<tr>
<td>Buyer</td>
<td>Brian Eggers</td>
</tr>
<tr>
<td>Approver</td>
<td>Erin - Approver Riley</td>
</tr>
</tbody>
</table>

Benefit Notes

Organizational Units

<table>
<thead>
<tr>
<th>Organizational Unit</th>
<th>Cost Reduction</th>
<th>Cost Avoidance</th>
<th>Revenue</th>
<th>Incentive</th>
<th>Efficiency</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCM-&gt;INFORMATION TECHNOLOGY SERVICES</td>
<td>11,309.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>11,309.00</td>
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<tr>
<td>UCM-&gt;Totals</td>
<td>11,309.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>11,309.00</td>
</tr>
<tr>
<td>Organizational Unit Totals</td>
<td>11,309.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>11,309.00</td>
</tr>
</tbody>
</table>
Benefit Bank – Actions

Attachments

<table>
<thead>
<tr>
<th>Document</th>
<th>Type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo_Attachment.docx</td>
<td>Baseline Documentation</td>
<td>view</td>
</tr>
</tbody>
</table>

Comments

Save Comment

<table>
<thead>
<tr>
<th>User</th>
<th>Comment</th>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
</table>

Actions

- Approve Benefit
- Return Benefit
- Reject Benefit
- Reassign Benefit

Current Status: Submitted
### Benefit Bank – Return Benefit

**UNIVERSITY OF CALIFORNIA**

**Procurement Services Benefit Bank**

#### Review Benefit

| Benefit ID | 299 |
| Activity: | Transactional Benefit Identified |
| Project: | Science & Engineering 2 building – network equipment |
| Category: | IT |
| Supplier: | NEXUS IS |
| Total Benefit Amount: | $11309.00 |
| Total Baseline Amount: | $105,229.00 |
| Campus Distribution: | UCM 100% |
| Agreement Date: | 07/17/2014 |
| Date Created: | 07/15/2014 |
| Buyer: | Brian Eggers |
| Approver: | Erin - Approver Riley |

**Benefit Notes**

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7/16/2014
Benefit Bank – Return Benefit

Erin, I believe the amount you entered is the pretax amount, can you double-check and resubmit? Thanks.

Actions
Return Benefit

Current Status: Submitted
Benefit Bank – Reassign Benefit

Attachments

<table>
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Actions

- Approve Benefit
- Return Benefit
- Reject Benefit
- Reassign Benefit

Current Status: Submitted

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Benefit Bank – Reassign Benefit

Confirms reassignment of a benefit with the following details:
- **Activity**: Transactional Benefit Identified
- **Project**: Science & Engineering 2 building – network equipment
- **Supplier**: NEXUS IS

Reassign to alternate approver: SophiaMay Dzelamonuy

General Notes:
Reassigning to SophiaMay as I’ll be out of the office.
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Procurement Mission

To expand opportunities for teaching, research and public service by delivering savings and efficient procurement services across the University of California.

UC Procurement Services Benefit Bank
Questions?
Contents

- Introduction
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- Demo

• What You Need to Know
Next Steps

You should have already received an email with your login information.

1. Use the link to the Benefit Bank and bookmark the URL
2. Enter your email address and click on ‘Forgot Password’ to update your password

Begin reviewing and approving July benefit!
What You Need to Know

• Stay tuned for further enhancements, trainings and a brief survey to get your feedback on how the tool works

• Training and support materials, including a quick start guide, can be accessed from the Help link in the tool and also found here: http://www.ucop.edu/procurement-services/procurement-systems/uc-benefit-training.html

• See support@ucprocure.zendesk.com for questions and additional support needs