



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

Background

- 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
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- What You Need to Know

Changes from Previous Process


Several improvements have been made over the previous process.

Action	Old Process	Benefit Bank
Benefit data entry	Involved collecting multiple Excel sheets	Entirely done by buyers within the tool
Submittal timing	Once a month	Real time submittal within the tool
Benefit review	Coordinated over email	Automatically routed to you for approval
Increased visibility	Campus Benefit totals not easily available	Benefit totals updated and viewable upon approval

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



**UC Procurement Services:
Recognizing Our Benefit**

VISION
To be acknowledged by University of California executive and campus leadership, faculty, staff and students as a high performing strategic partner that is essential to the financial health of the University.

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

IMPORTANCE OF UC BENEFIT
Total UC Benefit is important because it allows us to highlight and communicate the work we do every day as procurement professionals in a consistent, accurate, and verifiable way.

Total UC Benefit is defined as the total annual benefit generated by procurement actions. These actions have been divided into four types.

Benefit Type	Definition
Cost Reduction	Benefit achieved when procurement action results in a total cost that is lower than baseline cost, and the baseline cost calculation is supported by documented historical price (i.e., previous contract, historical costs, or imputed historical cost).
Cost Avoidance	Benefit achieved when procurement action results in avoidance of additional cost (i.e., maintenance fees, requested price increases, or other ancillary costs).
Incentives	Benefit achieved when procurement action results in new gross incentive (based on volume, compliance/utilization, transaction size, electronic payment, e-commerce, signing bonus, GPO, management fees, etc.).
Revenue	Benefit achieved when procurement action results in revenue generation.

A baseline type and amount must be specified in order to calculate a benefit. The first three baseline types are listed in order of preference.

	Baseline Type	Definition
Cost Reduction	Previously Contracted	The pricing, terms and peripheral costs in the baseline are as specified in pre-existing vendor agreements; the current procurement project scope is for a like set of products or services.
	Historical Costs	The pricing, terms and peripheral costs in the baseline are the actual costs for a specific Category or Sub-Category of spend over the 12-month period immediately preceding a sourcing event.
	Imputed Historical Costs	The pricing, terms and peripheral costs in the baseline are to be established either by: I. the initial quoted price from a vendor for a basket of goods, processes and/or services. II. the average of all responsive, non-awarded bids from a multi-vendor RFP process III. the budget, index, or other benchmark.
Cost Avoidance	Cost Inclusive of Increase	The pricing, terms and peripheral costs in the baseline are to be established either by: I. the supplier's request for a price increase II. a documented trend in market price increase III. other contributing factors to an increased cost.

Training material is available at www.ucop.edu/procurement-services/procurement-systems. For additional information, please speak with your UC Benefit Approver.

3/2014

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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

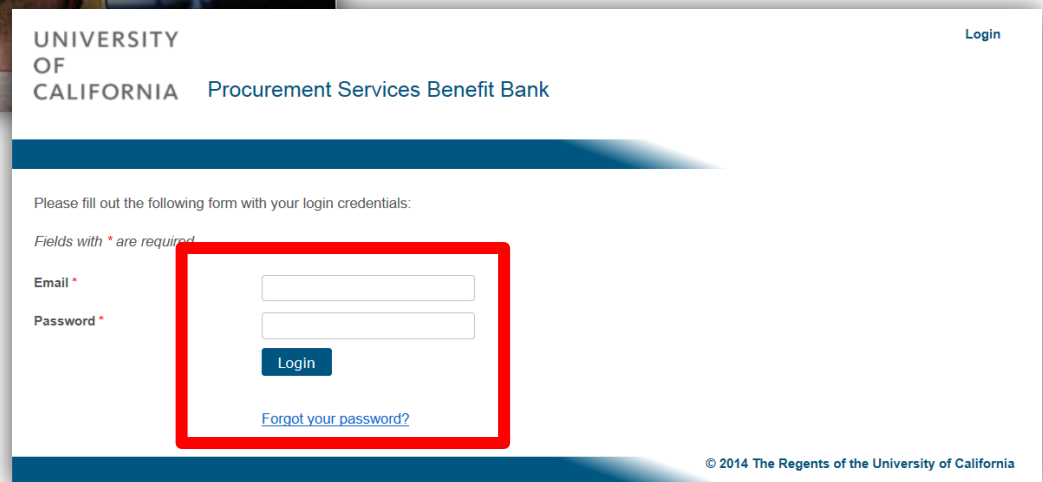
- How does it work?

- 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

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

Welcome Erin - Approver Riley Dashboard Help Search

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

Search All Benefits

[My Approver Queue](#) | [My Proxy Queue](#)

Pending My Approval (1)Returned (0)Resubmitted (0)Approved (0)Rejected (0)All (1)

Benefit Bank – Queue

My Approver Queue | My Proxy Queue

Pending My Approval (4)

Returned (0)






Resubmitted (0)

Approved (0)

Rejected (1)

All (5)

Displaying 1-5 of 5 result(s).

Benefit ID	Activity ID	Project Name	Activity Type	Supplier	Status	Date Created	
299	301	Science & Engineering 2 building – network equipment	Transactional Benefit Identified	NEXUS IS	Submitted	07/15/2014	
301	303	Science & Engineering 2 building – network equipment	Transactional Benefit Identified	NEXUS IS	Submitted	07/15/2014	
303	305	Science & Engineering 2 building – network equipment	Transactional Benefit Identified	NEXUS IS	Submitted	07/15/2014	
305	307	Science & Engineering 2 building – network equipment	Transactional Benefit Identified	NEXUS IS	Submitted	07/15/2014	
297	299	Erin Test	Transactional Benefit Identified	A T STILL UNIV OF HEALTH SCIENCES INC	Rejected	07/15/2014	

Benefit Bank – Review Benefit

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

[Dashboard](#) [Help](#) [Search](#)

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

Organizational Units

Organizational Unit	Cost Reduction	Cost Avoidance	Revenue	Incentive	Efficiency	Total
UCM->INFORMATION TECHNOLOGY SERVICES	11,309.00	-	-	-	-	11,309.00
UCM->Totals	11,309.00	-	-	-	-	11,309.00
Organizational Unit Totals	11,309.00	-	-	-	-	11,309.00

Benefit Bank – Actions

Attachments

Document	Type	Actions
Demo_Attachment.docx	Baseline Documentation	view

Comments

[Save Comment](#)

User	Comment	Action	Date
Brian Eggers	-new benefit-	Draft	2014-07-15 14:29:08
Brian Eggers	-submitted by buyer-	Submitted	2014-07-15 14:32:11

Actions

[Approve Benefit](#) [Return Benefit](#) [Reject Benefit](#) [Reassign Benefit](#)

Current Status: Submitted

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Benefit Bank – Return Benefit

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

Dashboard Help Search

Review Benefit

		Error?	Error Notes
Benefit ID	299		
Activity:	Transactional Benefit Identified	<input type="checkbox"/>	
Project:	Science & Engineering 2 building – network equipment	<input type="checkbox"/>	
Category:	IT	<input type="checkbox"/>	
Supplier:	NEXUS IS	<input type="checkbox"/>	
Total Benefit Amount:	\$ 11309.00	<input checked="" type="checkbox"/>	<input type="text" value="Is this the pretax amount?"/>
Total Baseline Amount:	\$ 105,229.00	<input type="checkbox"/>	
Campus Distribution:	UCM 100%	<input type="checkbox"/>	
Agreement Date:	07/17/2014	<input type="checkbox"/>	
Date Created:	07/15/2014	<input type="checkbox"/>	
Buyer:	Brian Eggers	<input type="checkbox"/>	
Approver:	Erin - Approver Riley	<input type="checkbox"/>	

Benefit Notes

Benefit Bank – Return Benefit

UCM->INFORMATION TECHNOLOGY SERVICES	11,309.00	-	-	-	-	11,309.00
UCM->Totals	11,309.00	-	-	-	-	11,309.00
Organizational Unit Totals	11,309.00	-	-	-	-	11,309.00

Attachments

Document	Type	Actions	Error?	Error Notes
Demo_Attachment.docx	Baseline Documentation	view	<input type="checkbox"/>	

Comments

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

[Save Comment](#)

User	Comment	Action	Date
Brian Eggers	-new benefit-	Draft	2014-07-15 14:29:08
Brian Eggers	-submitted by buyer-	Submitted	2014-07-15 14:32:11

Actions

[Return Benefit](#)

Current Status: Submitted

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Benefit Bank – Reassign Benefit

Attachments

Document	Type	Actions
Demo_Attachment.docx	Baseline Documentation	view

Comments

[Save Comment](#)

User	Comment	Action	Date
Brian Eggers	-new benefit-	Draft	2014-07-15 14:29:08
Brian Eggers	-submitted by buyer-	Submitted	2014-07-15 14:32:11

Actions

[Approve Benefit](#) [Return Benefit](#) [Reject Benefit](#) [Reassign Benefit](#)

Current Status: Submitted

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Benefit Bank – Reassign Benefit

Confirm Reassign Benefit

Activity: Transactional Benefit Identified
Project: Science & Engineering 2 building – network equipment
Supplier: NEXUS IS

Reassign to alternate approver: SophiaMay Dzelamonyuy

General Notes
Reassigning to SophiaMay as I'll be out of the office.

Reassign Benefit Cancel

Attachments

Document
Demo_Attachment.docx

Comments

Save Comment

User	Comment	Action	Date
Brian Eggers	-new benefit-	Draft	2014-07-15 14:29:08
Brian Eggers	-submitted by buyer-	Submitted	2014-07-15 14:32:11

Actions

Approve Benefit Return Benefit Reject Benefit Reassign Benefit

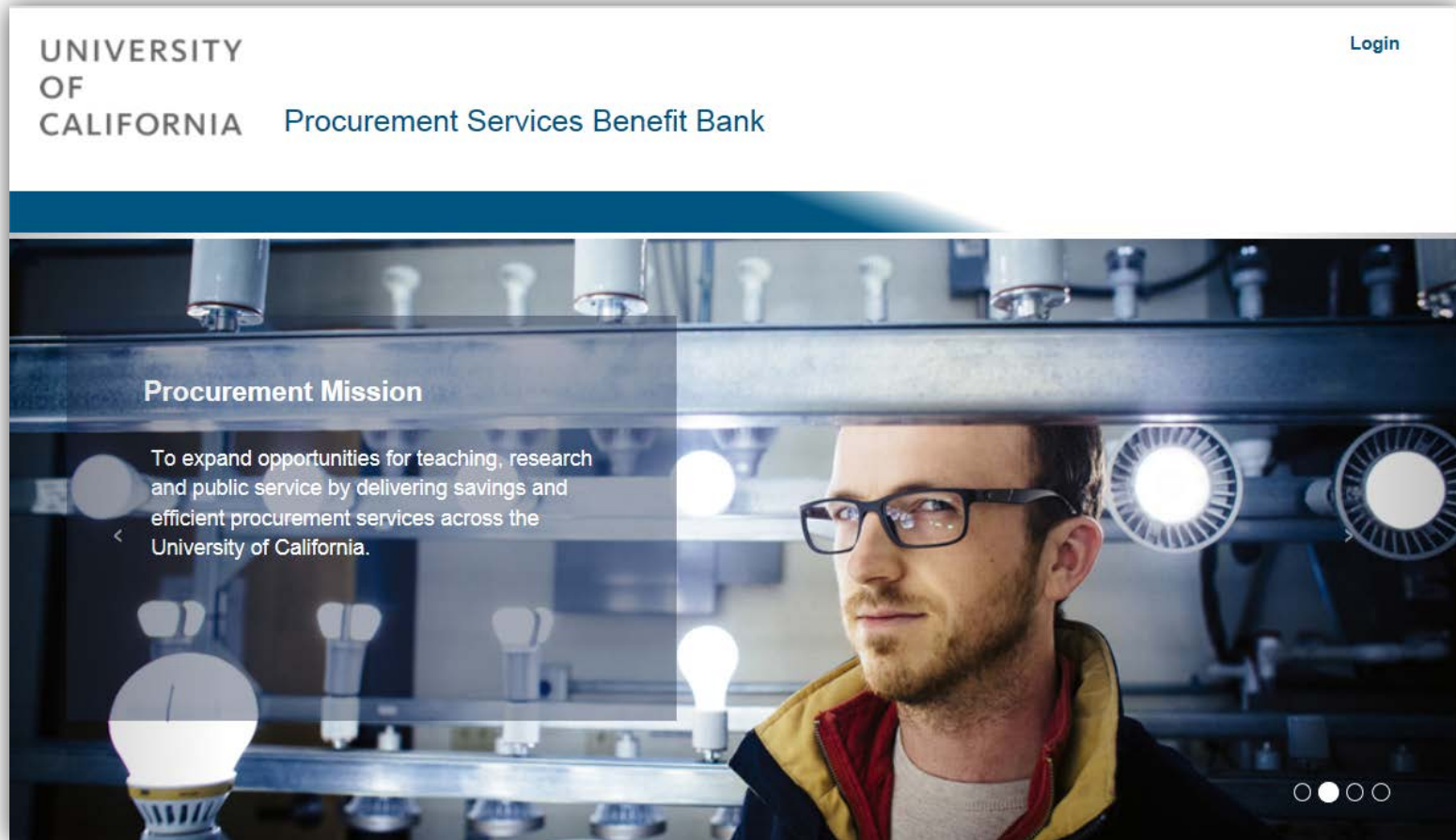
Current Status: Submitted

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Demo



[UC Procurement Services Benefit Bank](#)

Questions?

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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

UC Benefit Bank Quick Start Guide



Reporting the benefit being delivered through professional sourcing and procurement activities