UC Benefit Bank
Quick Start Guide

Reporting the benefit being delivered through professional sourcing and procurement activities
**GETTING STARTED**

- **ACCESS THE BENEFIT BANK**
  Use the hyperlink below to access the Benefit Bank:
  
  [https://procurementbenefit.ucop.edu/](https://procurementbenefit.ucop.edu/)

- **ADD TO FAVORITES OR BOOKMARKS**
  Add the Benefit Bank page to your Favorites or Bookmarks for easy access!

- **USER NAME AND PASSWORD**
  Users will receive an email containing login (email address) and temporary password. Click the Forgot Password link to change your password.

- **SYSTEM TIME-OUT**
  The system will time-out after one hour of inactivity.

- **BROWSER COMPATIBILITY**
  Benefit Bank is compatible with Internet Explorer, Firefox and Chrome.
1) **BENEFIT BY CAMPUS:** Displays a running total of new UC Benefit by campus for the current fiscal year. Benefit gets added once it is approved.

2) **MY BENEFIT QUEUE:** Provides a snapshot of all the benefit you have created in the tool. The list defaults to display “All” can be filtered by selecting the desired status.

3) **SEARCH ALL BENEFITS:** System search using keywords ((ie: supplier name, project name, campus)

4) **CREATE BENEFIT:** Select the appropriate campus bubble to create a benefit. Each campus for which you are authorized to enter benefit will be available for selection.
1) **PROJECT NAME**: Enter a project name that includes the good or service procured.

2) **UC CATEGORY**: Select the appropriate category or UC Category Group from the drop-down list.

3) **SUPPLIER**: One you begin typing the Supplier name, a list of matching suppliers will appear. Make your selection from the list. If supplier is new to UC, select *OTHER.

4) **BASELINE TYPE**: Select the appropriate baseline type from the drop-down list.

5) **TOTAL BASELINE AMOUNT**: Enter the total baseline amount (numbers only). If benefit is multi-year, enter the total across all years.
### Step 1 – Adding Benefit (Cont.)

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>6) <strong>ACTIVITY:</strong></td>
<td>Select the appropriate procurement activity from the list. Once an activity is selected, the required fields will open below.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7) <strong>DOCUMENT TYPE:</strong></td>
<td>Select the documentation for the transaction.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>8) <strong>AGREEMENT DATE:</strong></td>
<td>Enter the effective date for the agreement.</td>
<td></td>
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<tr>
<td>9) <strong>AGREEMENT ID:</strong></td>
<td>Enter the identification number for the Invoice, PO or P-Card transaction.</td>
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</tr>
<tr>
<td>10) <strong>IMPACTED CAMPUS(ES):</strong></td>
<td>Most entries will be for your campus only. If the benefit is being shared across multiple campuses, check all that apply. This selection will determine the organizational units available for selection in Step 2.</td>
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</tbody>
</table>

Once you **SAVE** this page, the benefit will be in “draft” status in your queue.
**Step 2 – Organizational Unit**

**TOTAL IDENTIFIED BENEFIT AMOUNT:** Enter the total benefit amount (numbers only). If benefit is multi-year, enter the total across all years.

**SEARCH FOR UNITS:** Enter the lowest known organizational unit. The search results will filter based on the impacted campus(es) selected in Step 1.

Click GO


**STEP 2 – ORGANIZATIONAL UNIT**

- **SEARCH RESULTS**: Locate the desired Org Unit in the list.
- **SELECT**: Select the Organizational Unit checkbox and enter the dollar amount under the appropriate Benefit Type.

<table>
<thead>
<tr>
<th>Select</th>
<th>Organizational Unit</th>
<th>Cost Avoidance $</th>
<th>Cost Reduction $</th>
<th>Incentives $</th>
<th>Revenue $</th>
<th>Efficiency $</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UC Merced / School Of Engineering /</td>
<td></td>
<td>11309</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>School Of Engineering / School Of Engineering / Computer Science &amp; Engineering</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>UC Merced / School Of Engineering / School Of Engineering / School Of Engineering / Materials Science &amp; Engineering</td>
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</tbody>
</table>

Click **APPLY**

- **VERIFY** Campus Total(s) and Benefit Type.

<table>
<thead>
<tr>
<th>Organizational Unit</th>
<th>Cost Avoidance $</th>
<th>Cost Reduction $</th>
<th>Incentives $</th>
<th>Revenue $</th>
<th>Efficiency $</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Merced / School Of Engineering / School Of Engineering / School Of Engineering / Computer Science &amp; Engineering</td>
<td>0</td>
<td>11309</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Click **SAVE**
## Step 3 – Attachments

### Step 3 - Add Attachments

- A maximum of 10 files may be attached.
- Maximum file size is 10 MB.

### Attachment Type:

Select the appropriate document from the list and click Choose File to upload from your computer or network location.

### Approver:

Will default to your approver. Only in circumstances where your approver and their proxy are out of the office, should selection of an alternate approver be made.

### Benefit Notes:

Explain to your approver the actions taken to generate the benefit. New manufacturer with more reliable equipment and unique features. Negotiated price down from original quote.

<table>
<thead>
<tr>
<th>Type</th>
<th>Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO</td>
<td>Nexus PO Z830PRA358.pdf</td>
</tr>
</tbody>
</table>

### Additional Details

<table>
<thead>
<tr>
<th>Approver</th>
<th>Benefit Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>SophiaMay Dzelamonyuy</td>
<td>New manufacturer with more reliable equipment and unique features. Negotiated price down from original quote.</td>
</tr>
</tbody>
</table>

1) **Attachment Type**: Select the appropriate document from the list and click Choose File to upload from your computer or network location.

2) **Approver**: Will default to your approver. Only in circumstances where your approver and their proxy are out of the office, should selection of an alternate approver be made.

3) **Benefit Notes**: Explain to your approver the actions taken to generate the benefit.

### Click SAVE
STEP 4 – REVIEW

Click SUBMIT FOR APPROVAL

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