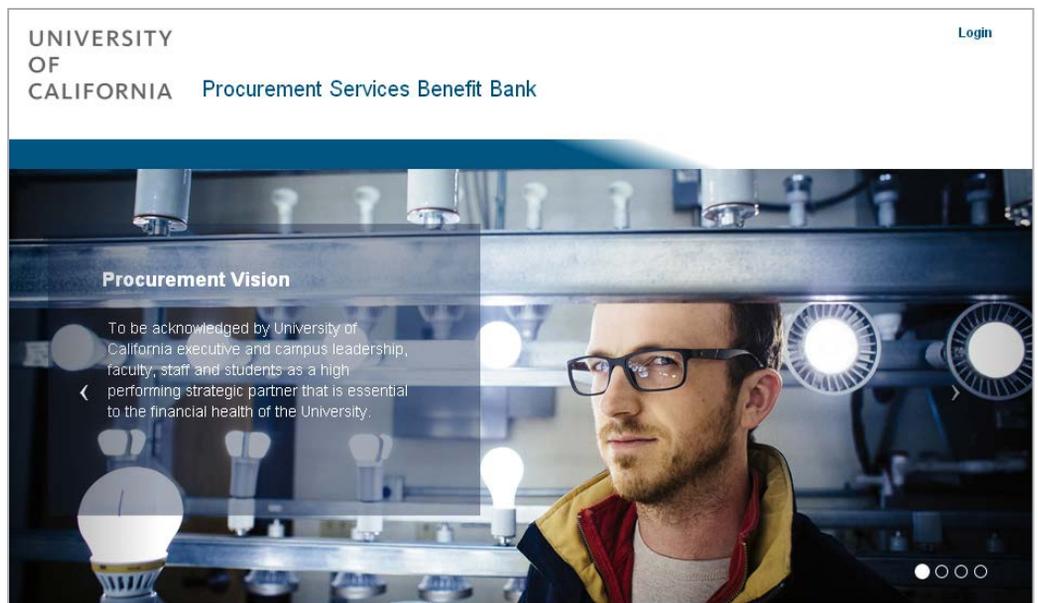


# UC Benefit Bank

## 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:

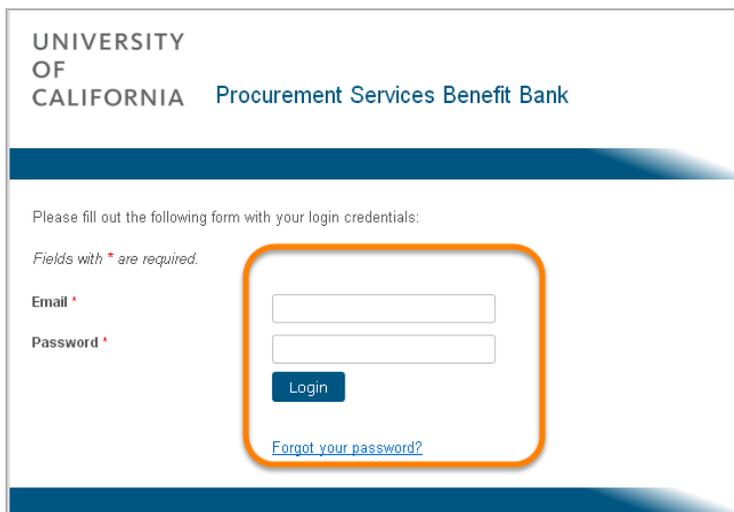
<https://procurementbenefit.ucop.edu/>

## ❖ 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.



The screenshot shows the login page for the University of California Procurement Services Benefit Bank. At the top left, it says "UNIVERSITY OF CALIFORNIA" and "Procurement Services Benefit Bank". Below this is a blue header bar. The main content area contains the text "Please fill out the following form with your login credentials:" and "Fields with \* are required." Below this are two input fields: "Email \*" and "Password \*". A blue "Login" button is positioned below the password field. A blue link "Forgot your password?" is located below the "Login" button. The entire login form area is enclosed in a rounded rectangle with an orange border.

## ❖ 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.

# DASHBOARD REVIEW

The dashboard screenshot shows the following components:

- 1 Benefit by Campus:** A table listing campus benefit totals.
- 3 Search All Benefits:** A search bar with a search button.
- 4 Create Benefit:** Two circular buttons for "UC Office of the President" and "Client Technology Services".
- 2 My Benefits:** A queue section with filters for Draft (1), Pending Approval (0), Returned to Me (0), Resubmitted (0), Approved (0), Rejected (0), and All (1).

Benefit ID	Activity ID	Project Name	Activity Type	Supplier	Status	Date Created	
377	385	name test	Transactional Benefit Identified	AES CHEMUNEX INC	Draft	07/11/2014	

- 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.

# STEP 1 – ADDING BENEFIT

Step 1 - Adding Benefit

Fields with \* are required.

Project Name \* 1

UC Category \* 2

Supplier \* 3

Baseline Type \* 4

Total Baseline Cost Amount \* 5

- 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.)

Benefit Organizational Units Attachments Preview

Step 1 - Adding Benefit (Cont.)

Activity \* 6 Transactional Benefit Identified

Transactional Benefit

Document Type \* 7 Select a Transaction Type...

Agreement Date \* 8 07/14/14

Agreement ID \* 9

Select Impacted Campuses\*

- UC Berkeley
- UC Davis
- UC Irvine
- UC Los Angeles
- UC Merced
- UC Office of the President
- UC Riverside
- UC San Diego
- UC San Francisco
- UC Santa Barbara
- UC Santa Cruz

Save Cancel

**6) ACTIVITY:** Select the appropriate procurement activity from the list. Once an activity is selected, the required fields will open below.

Select an Activity...

- Sourcing Benefit Forecasted
- Sourcing Benefit Identified
- Transactional Benefit Identified
- Missed Benefit

**7) DOCUMENT TYPE:** Select the documentation for the transaction.

Select a Transaction Type...

- Invoice
- P-Card
- Purchase Order

**8) AGREEMENT DATE:** Enter the effective date for the agreement.

**9) AGREEMENT ID:** Enter the identification number for the Invoice, PO or P-Card transaction.

**10) IMPACTED CAMPUS(ES):** 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.

Once you **SAVE** this page, the benefit will be in “draft” status in your queue.

# STEP 2 – ORGANIZATIONAL UNIT



## Step 2 - Add Organizational Units

**Activity:** Transactional Benefit Identified  
**Project:** Science & Engineering 2 building - network equipment  
**Supplier:** NEXUS IS  
**Total Identified Benefit Amount**  ←

### Search for Units

←

**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(Cont.)



- **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.

Select	Organizational Unit	Cost Avoidance \$	Cost Reduction \$	Incentives \$	Revenue \$	Efficiency \$
<input checked="" type="checkbox"/>	UC Merced / School Of Engineering / School Of Engineering / School Of Engineering / Computer Science & Engineering	<input type="text"/>	<input type="text" value="11309"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	UC Merced / School Of Engineering / School Of Engineering / School Of Engineering / Materials Science & Engineering	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Apply**

**Click APPLY**

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

Organizational Unit	Cost Avoidance \$	Cost Reduction \$	Incentives \$	Revenue \$	Efficiency \$	Action
UC Merced / School Of Engineering / School Of Engineering / School Of Engineering / Computer Science & Engineering	0	11309	0	0	0	<a href="#">delete / edit</a>
<b>UC Merced total:</b>	<b>0</b>	<b>11309</b>	<b>0</b>	<b>0</b>	<b>0</b>	

**Save** **Cancel**

**Click SAVE**

# STEP 3 – ATTACHMENTS



## Step 3 - Add Attachments

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

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

**Attachment Type** 1  
PO   
**Document**  
 Nexus PO Z830PRA358.pdf

Current Attachments

Type	Document	Actions
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### Additional Details

**Approver \*** 2 SophiaMay Dzelamonyuy

**Benefit Notes** 3  
New manufacturer with more reliable equipment and unique features. Negotiated price down from original quote.

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

- Baseline Documentation
- Benefit Documentation
- Business Case
- Contract
- Invoice
- PO**
- Other Attachment

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



## Step 4 - Preview

[ Edit ]

<b>Benefit ID</b>	421
<b>Activity:</b>	Transactional Benefit Identified
<b>Project:</b>	Science & Engineering 2 building - network equipment
<b>Category:</b>	IT
<b>Supplier:</b>	NEXUS IS
<b>Total Benefit Amount:</b>	\$ 11,309.00
<b>Total Baseline Amount:</b>	\$ 105,229.00
<b>Campus Distribution:</b>	UCM 100%
<b>Agreement Date:</b>	07/17/2014
<b>Date Created:</b>	07/14/2014
<b>Buyer:</b>	Erin Riley
<b>Approver:</b>	SophiaMay Dzelamonyuy

### Benefit Notes

New manufacturer with more reliable equipment and unique features. Negotiated price down from original quote.

### Organizational Units

Organizational Unit	Cost Reduction	Cost Avoidance	Revenue	Incentive	Efficiency	Total
UCM->COMPUTER SCIENCE & ENGINEERING	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
Nexus_PO_Z830PRA358.pdf	PO	<a href="#">view</a>

Save as Draft



Submit for Approval

Click **SUBMIT FOR APPROVAL**