

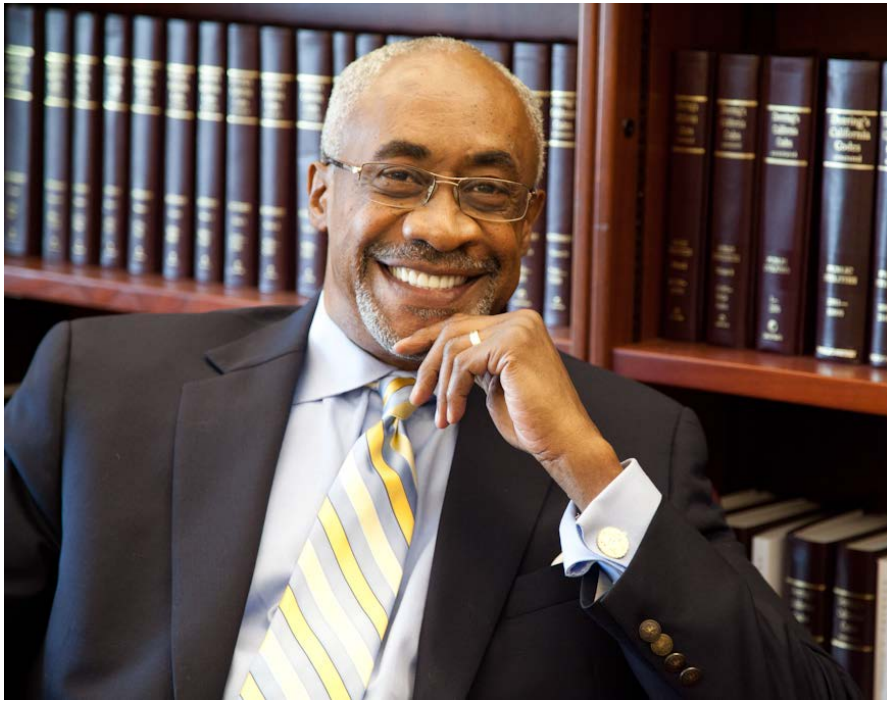


BENEFIT BANK TRAINING

UNIVERSITY
OF
CALIFORNIA

Introduction

- Thank you for joining today's training!
- Opening comments
- Today's Agenda



Associate Vice President, Chief Procurement Officer

BILL COOPER

Benefit Bank training

The purpose of this session is to familiarize you with how to use the Benefit Bank.

- Today's agenda includes:
 - Background
 - Changes from the previous process
 - About the Benefit Bank
 - Demo
 - What you need to know
- After this session, you'll know....
 -how to use the tool
 -where to go for support
 -how to get started



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

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Changes from Previous Process


Several improvements have been made over the previous process.

Action	Old Process	Benefit Bank
Benefit data entry	Involved managing multiple Excel spreadsheets	Entirely done within the tool
Submittal timing	Once a month	Real time submittal within the tool
Benefit review	Coordinated over email	Automatically routed to your approver
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

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Login

Procurement Mission

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



UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Login

Please fill out the following form with your login credentials:

*Fields with * are required*

Email *

Password *

Login

[Forgot your password?](#)

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Benefit Bank Dashboard

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank

Log Out

Welcome Erin 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	\$1,164,010
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
Client Technology Services COE	\$0
Total	\$10,207,114

Search All Benefits

Create Benefit



UC Office of the President

Draft (0) Pending Approval (0) Returned to Me (0) Resubmitted (0) Approved (0) Rejected (0) All (0)

Benefit ID	Activity ID	Project Name	Activity Type	Supplier	Status	Date Created
			All		All	

No results found.

Benefit Bank Dashboard

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

Welcome Erin Riley Dashboard Help Search

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Benefit ID	Activity ID	Project Name	Activity Type	Supplier	Status	Date Created
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No results found.

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Benefit ID	Activity ID	Project Name	Activity Type	Supplier	Status	Date Created	
			All <input type="button" value="v"/>		All <input type="button" value="v"/>		

No results found.

Benefit Bank Step 1 – Add a Benefit (Transactional)

Welcome Erin Riley Dashboard Help Search

Benefit Organizational Units Attachments Preview


Step 1 - Adding Benefit

*Fields with * are required.*

Project Name *	<input type="text"/>	Select Impacted Campuses* <ul style="list-style-type: none"><input type="checkbox"/> UC Berkeley<input type="checkbox"/> UC Davis<input type="checkbox"/> UC Irvine<input type="checkbox"/> UC Los Angeles<input type="checkbox"/> UC Merced<input type="checkbox"/> UC Office of the President<input type="checkbox"/> UC Riverside<input type="checkbox"/> UC San Diego<input type="checkbox"/> UC San Francisco<input type="checkbox"/> UC Santa Barbara<input type="checkbox"/> UC Santa Cruz
UC Category *	<input type="text" value="Select a Category..."/>	
Supplier *	<input type="text"/>	
Baseline Type *	<input type="text" value="Select a Baseline Type..."/>	
Total Baseline Cost Amount *	<input type="text"/>	
Activity *	<input type="text" value="Transactional Benefit Identified"/>	
Transactional Benefit		
Document Type *	<input type="text" value="Select a Transaction Type..."/>	
Agreement Date *	<input type="text" value="07/14/14"/> <small>31</small>	
Agreement ID *	<input type="text"/>	

Benefit Bank Step 1 – Add a Benefit (Sourcing)

Welcome Erin Riley Dashboard Help Search



Step 1 - Adding Benefit

*Fields with * are required.*

Project Name *	<input type="text"/>
UC Category *	Select a Category... <input type="button" value="v"/>
Supplier *	<input type="text"/>
Baseline Type *	Select a Baseline Type... <input type="button" value="v"/>
Total Baseline Cost Amount *	<input type="text"/>
Activity *	Sourcing Benefit Identified <input type="button" value="v"/>

Sourcing Benefit Identified

Agreement Date *	<input type="text" value="07/14/14"/> <input type="button" value="ET"/>
Duration in Months *	<input type="text"/>
Contract Number *	<input type="text"/>


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

Benefit Bank Step 2 – Add Organizational Unit

UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank Log Out

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Step 2 - Add Organizational Units


Activity: Transactional Benefit Identified
Project: Science & Engineering Bldg 2 - Networking Equipment
Supplier: NEXUS IS

Total Identified Benefit Amount

Search for Units

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Benefit Bank Step 3 – Add Attachments



Step 3 - Add Attachments DRAFT

Activity: Transactional Benefit Identified
Project: Science & Engineering Bldg 2 - Networking Equipment
Supplier: NEXUS IS

Attachment Type **Document**

Select One...

Current Attachments

Type	Document	Actions
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Additional Details

Approver *

Benefit Notes

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Benefit Bank Step 4 – Preview

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Benefit Organizational Units Attachments Preview

Step 4 - Preview DRAFT

[Edit](#)

Benefit ID: 283
Activity: Transactional Benefit Identified
Project: Science & Engineering Bldg 2 - Networking Equipment
Category: IT
Supplier: NEXUS IS
Total Benefit Amount: \$ 11,309.00
Total Baseline Amount: \$ 105,229.00
Campus Distribution: UCM 100%
Agreement Date: 07/15/2014
Date Created: 07/14/2014
Buyer: Erin Riley
Approver: SophiaMay Dzelamonyuy

Benefit Notes

Was able to negotiate a savings off the original quote that was received.

Organizational Units

[Edit](#)

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

Attachments

[Edit](#)

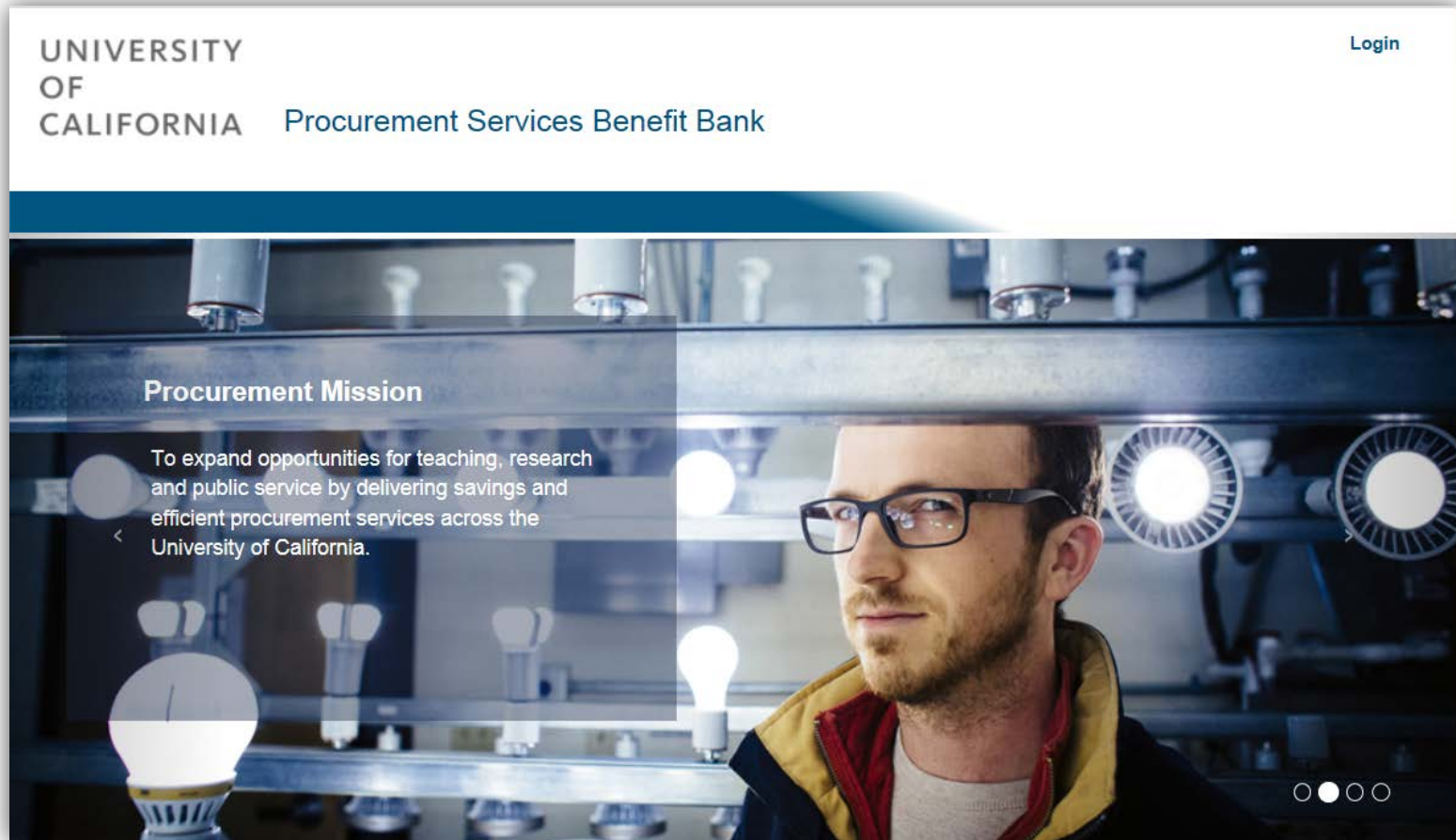
Document	Type	Actions
Nexus_IS_Inc_(Cisco_VAR)_PO#_Z830_P_RA358.pdf	PO	view

[Submit for Approval](#) [Save as Draft](#)

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Demo



[Link to UC Procurement Services Benefit Bank](#)

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Next Steps

You'll receive an email shortly 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 logging 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 your approver with questions and additional support needs

UC Benefit Bank Quick Start Guide



Reporting the benefit being delivered through professional sourcing and procurement activities

Questions?