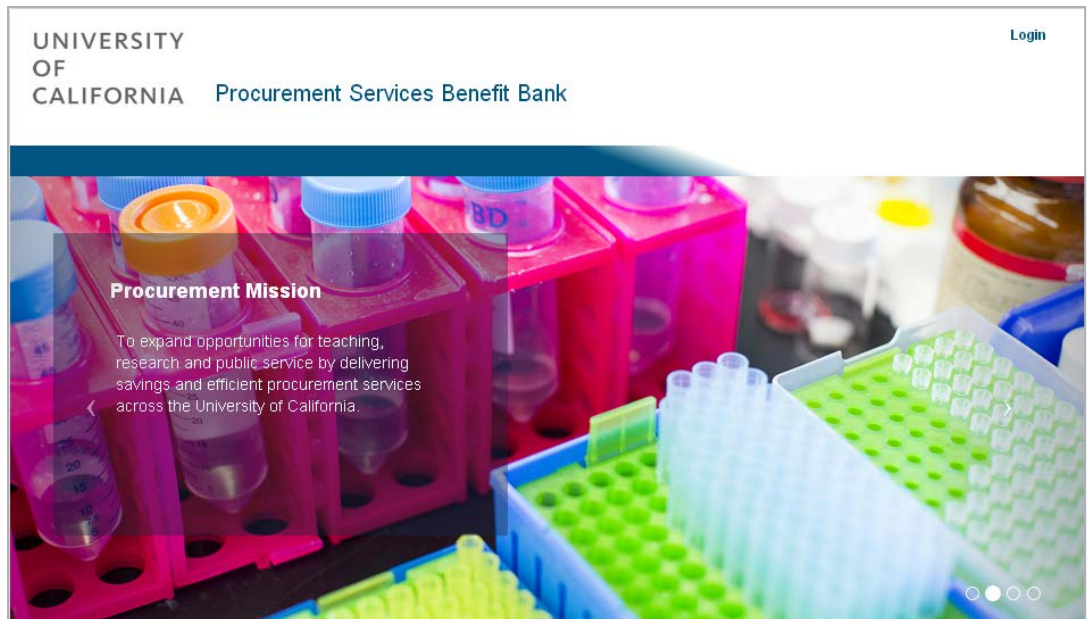


UC Benefit Bank

Approver 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:

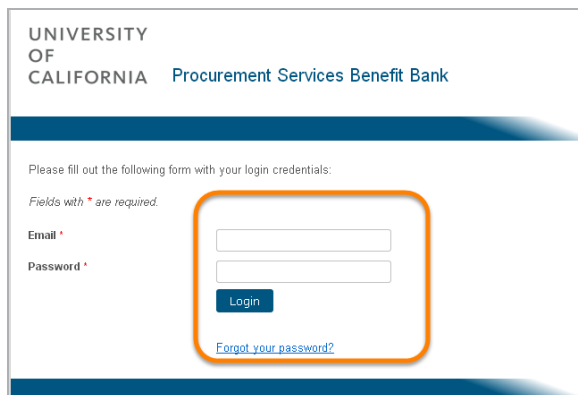
<https://procurementbenefit.ucop.edu/>

❖ ADD TO FAVORITES OR BOOKMARKS

Add the Benefit Bank page to your Favorites or Bookmarks for easy access!

❖ APPROVER USER NAME AND PASSWORD

Approvers will receive an email containing login (email address) and temporary password. Click the Forgot Password link to change your password.

The image shows a screenshot of the login page for the University of California Procurement Services Benefit Bank. At the top, it says "UNIVERSITY OF CALIFORNIA Procurement Services Benefit Bank". Below this, there is a blue header bar. The main content area has a white background with a blue gradient at the bottom. It contains the text "Please fill out the following form with your login credentials:" and "Fields with * are required." Below this, there 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 at the bottom of the form area. The entire form area is enclosed in a thin blue 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.

❖ GET HELP

As an approver, you are the first line of support for your submitters. If you cannot resolve the issue, or if technical support is needed, please contact:

SUPPORT@UCPROCURE.ZENDESK.COM

APPROVER DASHBOARD (TOP)

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)






- ❖ **MY APPROVER QUEUE:** The dashboard will default to display all items in the Approver queue. Select any one of the status buttons to filter the list by:
 - **Pending My Approval**
 - **Returned**
 - **Resubmitted**
 - **Approved**
 - **Rejected**
- ❖ **MY PROXY QUEUE:** If serving as a proxy for another Approver, select the My Proxy Queue hyperlink to access their items.

APPROVER DASHBOARD (BOTTOM)

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	

❖ **REVIEW BENEFIT:** Click the  icon to review a benefit and take the appropriate action.

❖ **MANAGE YOUR QUEUE:** Select any of the column headers to sort the items in your queue.

REVIEW BENEFIT (TOP)

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: \$ 11,309.00
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

- 1) REVIEW BENEFIT:** Validate all pertinent details including activity, supplier, benefit amount, baseline amount, etc.
- 2) BENEFIT NOTES:** If supplier added notes to the item before submitting, you will be able to review them here.
- 3) ORGANIZATIONAL UNITS:** Review the org units, benefit types and amounts.

REVIEW BENEFIT (BOTTOM)

Attachments

Document	Type	Actions
Demo_Attachment.docx	Baseline Documentation	view

Comments

5

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 6

Approve Benefit Return Benefit Reject Benefit Reassign Benefit

Current Status: Submitted

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- 4) **REVIEW ATTACHMENTS:** Click the “view” hyperlink to review the benefit documentation.
- 5) **COMMENTS:** This is an optional field. If you enter a comment, click **Save**. A record of all comments is retained in the benefit record.
- 6) **ACTIONS:** Select one of the following actions (described in detail on the following pages):
 - **Approve Benefit**
 - **Return Benefit**
 - **Reject Benefit**
 - **Reassign Benefit**

ACTIONS

Approve Benefit

Return Benefit

Reject Benefit

Reassign Benefit

- ❖ **APPROVE BENEFIT:** When you select this button, a dialog box will appear where you can include an *Optional Approval Note* for the buyer.

- ❖ Once approved, the benefit will be visible in the buyer's queue in Approved status.

Confirm Approve Benefit notes for the buyer

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

Include an optional Approval note here.

General Notes
Everything looks great, nice work!

Approve Benefit Cancel

Approve Benefit

Return Benefit

Reject Benefit

Reassign Benefit

- ❖ **RETURN BENEFIT:** When you select this button, a new page will open where you can identify the specific Benefit section that needs to be corrected or clarified, and enter the reason(s) for the return.
- ❖ The **Return Benefit** page will contain checkboxes next to each benefit field. When the **Error?** checkbox is selected, a text box will open for you to enter **Error Notes**.

ACTIONS (CONT.)

Approve Benefit

Return Benefit

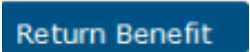
Reject Benefit

Reassign Benefit

Dashboard Help Search

Review Benefit

		Error?	Error Notes
Benefit ID	301		
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"/>	
Total Baseline Amount:	\$ 105,229.00	<input type="checkbox"/>	

- ❖ Continue your review, checking the box for any errors and entering error notes. It is a best practice identify all errors on a single return.
- ❖ When your review is complete click Return Benefit. 
- ❖ A dialog box will appear confirming the errors identified. You can include an *Optional* Return Benefit note for the buyer.
- ❖ Once returned, the benefit will be visible in the buyer's queue in Returned status

Confirm Return Benefit notes for the buyer


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

This note is pre-filled with information you indicated as being in error. You may add additional notes here. All notes will be lost and benefit will not be returned if you Cancel.

Errors / Error Notes:

supplier: This may not be the correct supplier, please verify.
benefit_amount: This amount appears not to take taxes into account.
org_units: I believe was actually a cost avoidance. Please verify and resubmit.

General Notes



ACTIONS (CONT.)

Approve Benefit

Return Benefit

Reject Benefit

Reassign Benefit

- ❖ **REJECT BENEFIT:** When this button is selected, a dialog box will appear where you must enter Reject Benefit Notes for the rejection.
- ❖ Once rejected, the benefit will display in the buyer's queue as rejected and no further action can be taken.

Confirm Reject Benefit notes for the buyer

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

Include a benefit rejection note here.

General Notes
The contract negotiations fell through and we are not engaging with this supplier.

Reject Benefit Cancel

Approve Benefit

Return Benefit

Reject Benefit

Reassign Benefit

- ❖ **REASSIGN BENEFIT:** Select this action when you want transfer responsibility of the benefit to another approver.
- ❖ Once reassigned, a dialog box will appear asking you to confirm the reassignment and enter *optional* notes for the assignee.

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.

Reassign Benefit Cancel