NetBenefit

Benefits Module Training

ADMIN MANUAL

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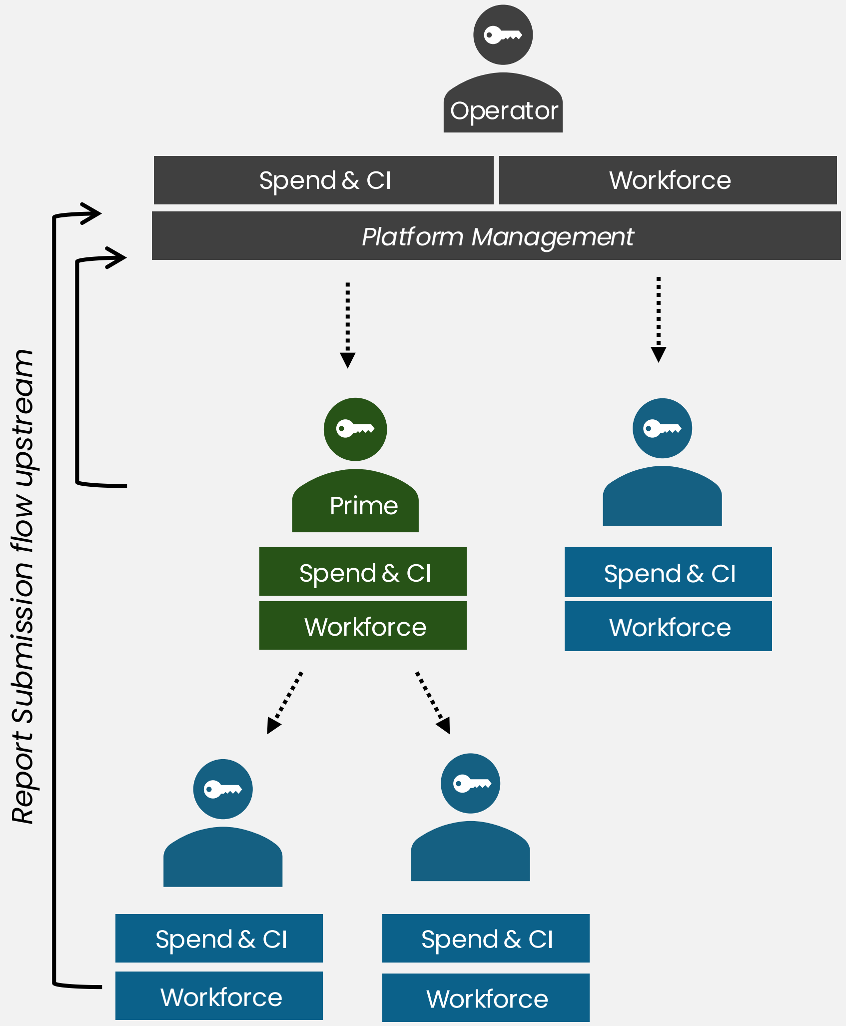
1 Introduction

Overview of The Benefits Module and Data Collection

Overview of The Benefits Module

The Benefits Module provides operators and contractors with the framework to efficiently report on socio-economic requirements. Contractor data is consolidated and rolled up to project operators using monthly report submissions.



Data Collection Workflows

Operator

- **Direct Spend**: Export from ERP → Download Template → Complete Validation → Upload → Incomplete Company Profiles
- **Direct Workforce**: Export from HRIS → New Workforce Report → Manage Employees → Add Work Hours → Submit Report
- **Direct CI**: Export from ERP → Download Template → Complete Validation → Upload

Contractor

- **Spend Report**: Export from ERP → New Spend Report → Manage Spend → Submit Report → New Company Requests Review Report Submission
- **Workforce Report**: Export from HRIS → New Workforce Report → Manage Employees → Add Work Hours → Submit Report → Review Report Submission
- **Optional: CI**: Export from ERP → Download Template → Complete Validation → Upload

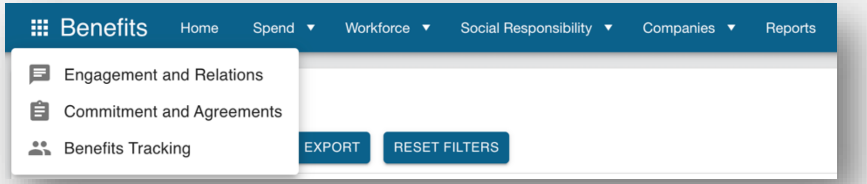
2

General Navigation

Navigation Menu, Inventory Screens, Record Views

Navigation Menu

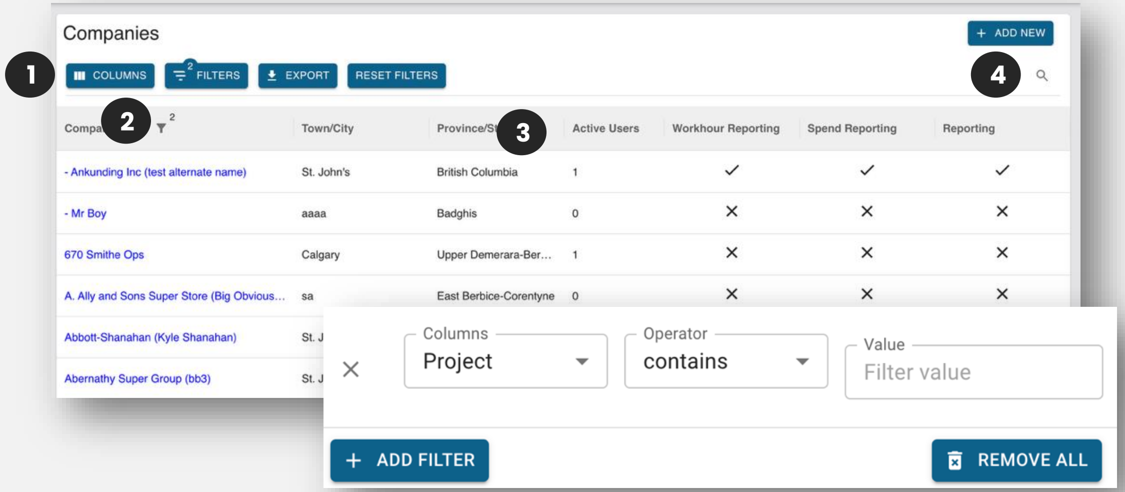
- **Waffle Navigation:** Move between platform modules.
- **Home Page:** View quick actions and outstanding Report Submissions.
- **Spend:** Includes Direct Spend and Spend Report Submissions.
- **Workforce:** Includes Workforce, Employee List, and Employees in Needing Review.
- **Social Responsibility:** Includes community investment and other regulator requirements.
- **Companies:** Full list of all companies within supply-chain.
  - **New Company Requests:** Manage new company profiles requested by reporting contractors.
  - **Incomplete Company Profiles:** Manage new company profiles created from direct spend.



Inventory Screens

The platform provides a standard structured system for managing records. Inventory Screens allow users to filter, sort, and export records.

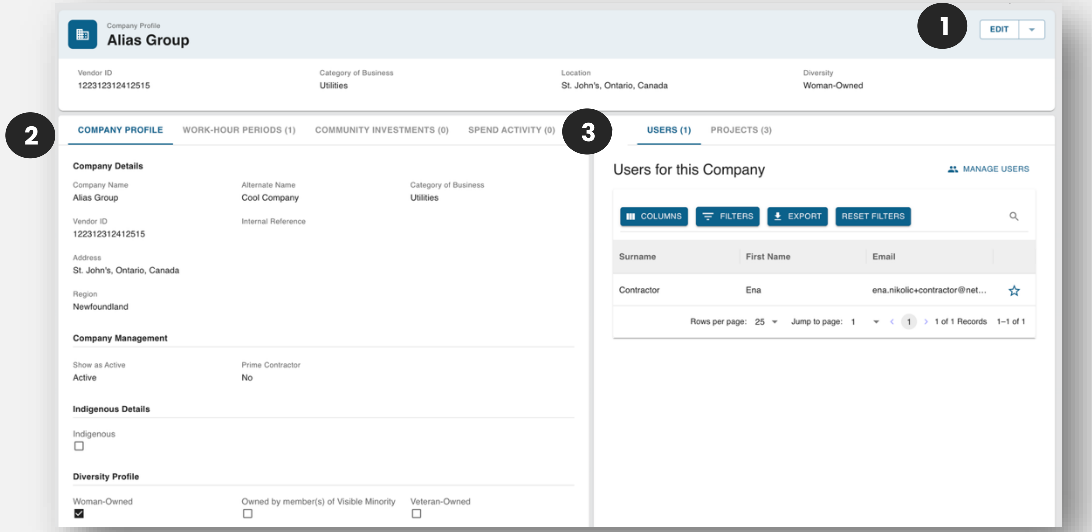
1. Manage which columns are visible by using the **Columns** button.
2. Filter using the Icons on each **Columns** or the **Filter Button**.
3. To resize columns, click and dragging the edges of each column header.
4. To search, expand the **Search Icon**.
5. Create new record using the **Add New** on the top-right.



Record View/ Record Profiles

Each record displays all key information in a structured, easy-to-navigate layout:

1. **Top Section:** Displays core details and quick action items in the **Quick Actions Dropdown**.
2. **Details Tab:** Displays the core record fields such as date, status, project, communication type.
   - **Additional Tabs**: Navigate through related records and activity.
3. **Right Sidebar:** Manage platform settings on the right card. This side bar will default open with active settings.



3 Internal Data

Managing Direct Spend, Workforce, and Community Investment Data

Direct Spend

INTERNAL DATA

Direct Spend

Getting Started:

- Setup a monthly export from your existing financial management systems (SAP).
- Ensure ongoing export meets monthly reporting requirements.
- Ensure person(s) responsible for ongoing management.

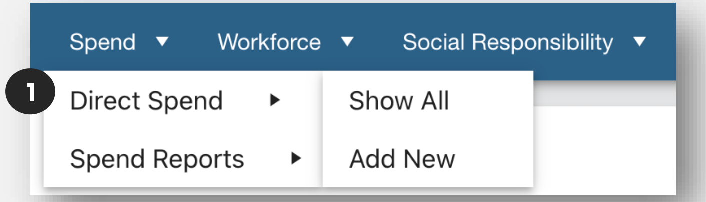
Monthly Reporting Requirements:

- Upload **Direct Spend** Records to the platform.
- Manage Incomplete Company Requests in the platform.

Step 1: Upload Direct Spend

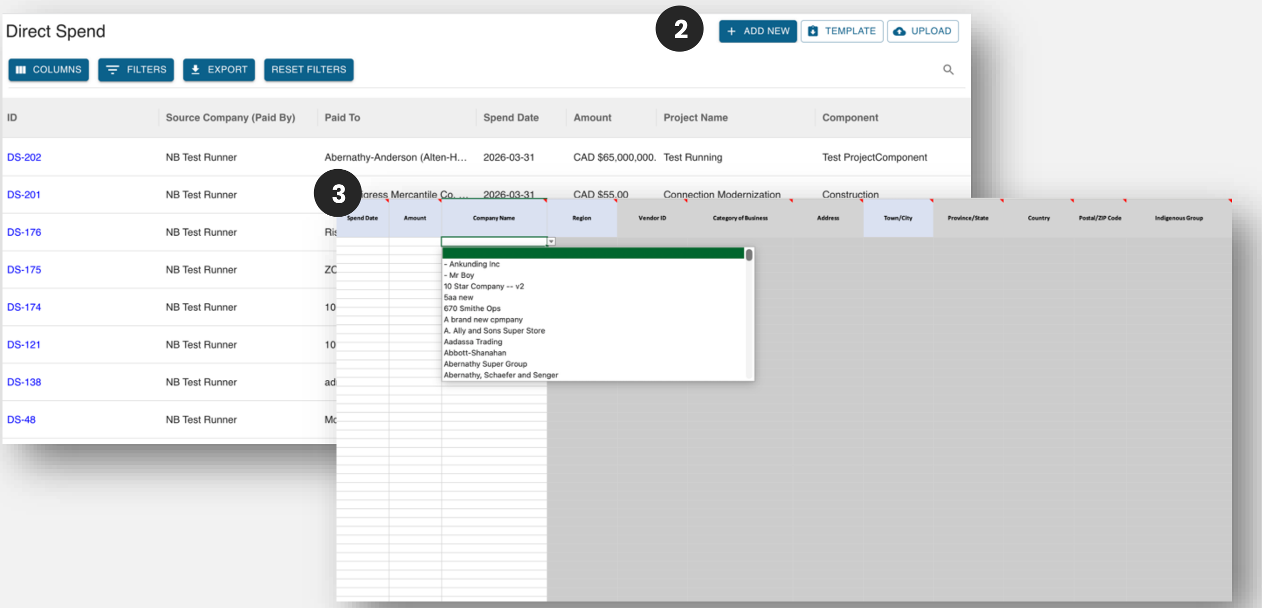
Key Action:

Itemized list of monthly expenditures. This is the pre-tax amounts paid to vendors.



Steps:

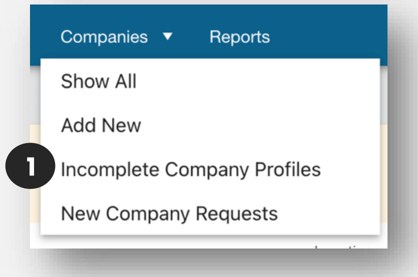
1. Select **Direct Spend** from the Navigation Menu.
2. To add spend records manually, select **Add New**. To upload records, download the template.
3. Templates are *Dynamic* and will reflect platform inputs. Move data to template and upload file.



Step 2: Incomplete Company Profiles

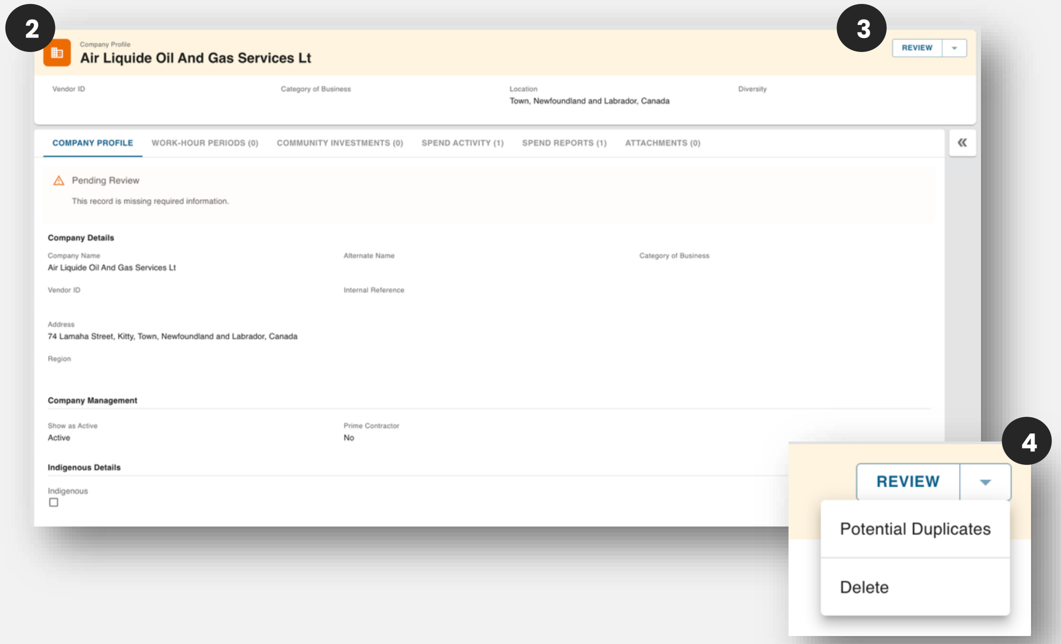
Key Action:

Manage company profiles with missing information.



Steps:

1. Go to **Incomplete Company Profiles**. Select Company Name to open the profile.
2. A Company Profile in review will be highlighted in yellow with missing fields left blank.
3. Select **Review** to update missing fields and **Save Changes**.
4. To merge profiles, select the **Review Drop Down** and select **Potential Duplicates**.



Direct Workforce: Employees & Hours

INTERNAL DATA

Direct Workforce

Getting Started:

- Employees are tracked using unique employee codes or IDs.
- Do NOT use individual names as this may interfere with confidentiality.
- Match affiliation based on employee self-identification.
- Monthly export are required from existing HRIS management systems (Workday).
- Ensure export meets monthly reporting requirements.
- Ensure person(s) responsible for ongoing management.

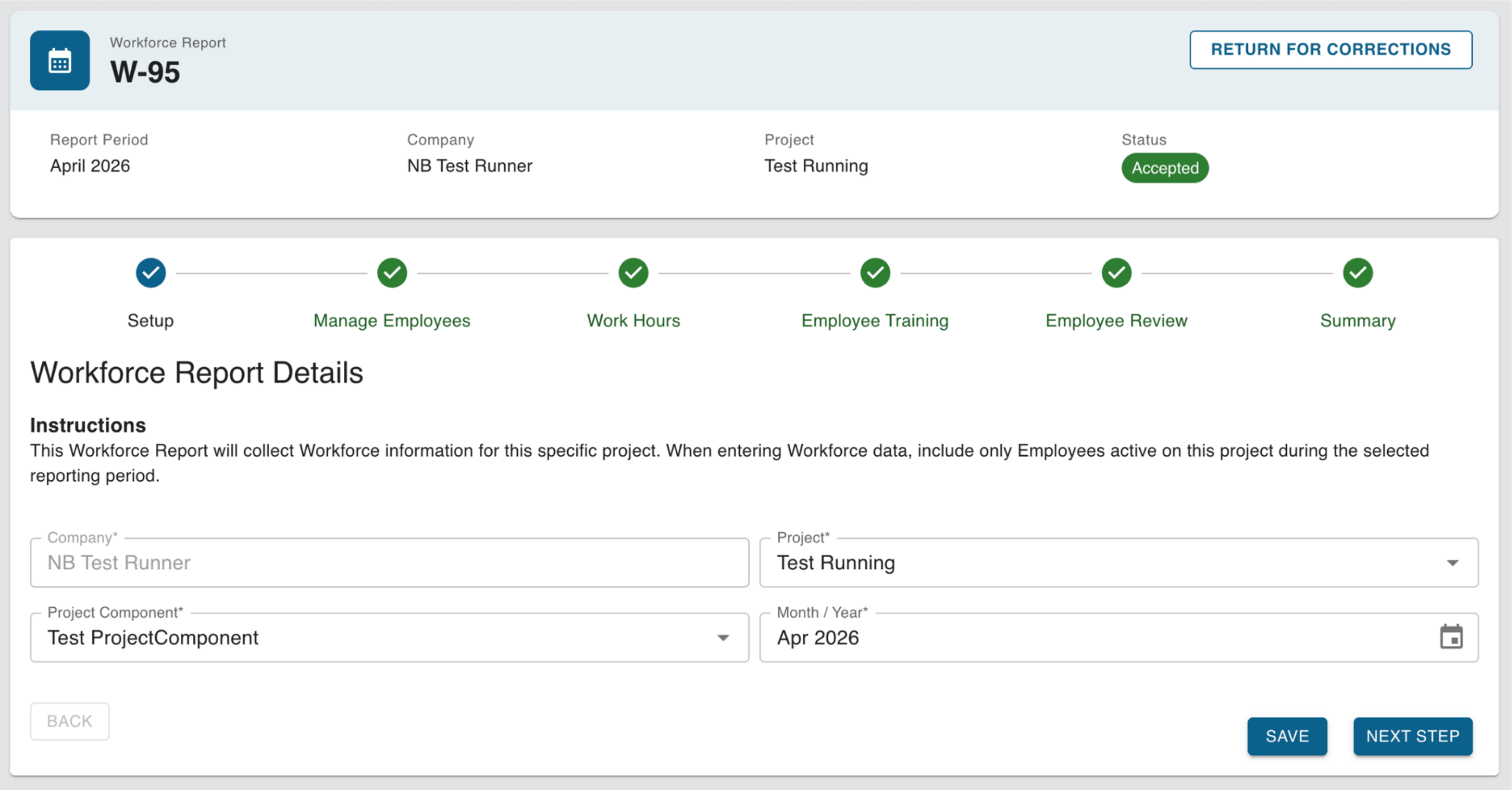
Monthly Reporting Requirements:

- Create a Workforce Report for the month
- Upload Employee and Work Hours

Direct Workforce Report

Key Action:

All workforce data is collected through monthly Workforce Reports. This means direct workforce is submitted using the same format as contractors.



Job Progression

Definitions:

Track job progression and employee history.

Steps:

1. When a new job positions is uploaded to an existing Employee Profile, job history is created using the Start Date.
2. Alternatively, open an Employee Profile and change the Job Position.
3. To view history, select the Job History Tab. To make additional changes, select the kebab menu to open records.

Direct Community Investment

INTERNAL DATA

Community Investment

Key Action:

Itemized list of monthly community investment expenditures. This is the pre-tax amounts paid to organizations.

Steps:

1. Select **Social Responsibility > Community Investment** from the Navigation Menu.
2. To add records manually, select **Add New**. To upload records, download the template.
3. Templates are *Dynamic* and will reflect platform inputs. Move data to template and upload file.

4 External Data

Managing Indirect Spend, Workforce, and Community Investment

Contractor Management

SET UP EXTERNAL DATA COLLECTION

Contractor Management

Getting Started:

- Set monthly reporting requirements and internal person(s) responsible
- Remember to review overdue/late submissions to ensure contractor compliance.

Monthly Reporting Requirements:

- Adding any new users or reporting contractors
- Onboard reporting contractors
- Manage New Company Requests
- Manage Spend Report Submissions

Add Reporting Contractors

Admin > Users

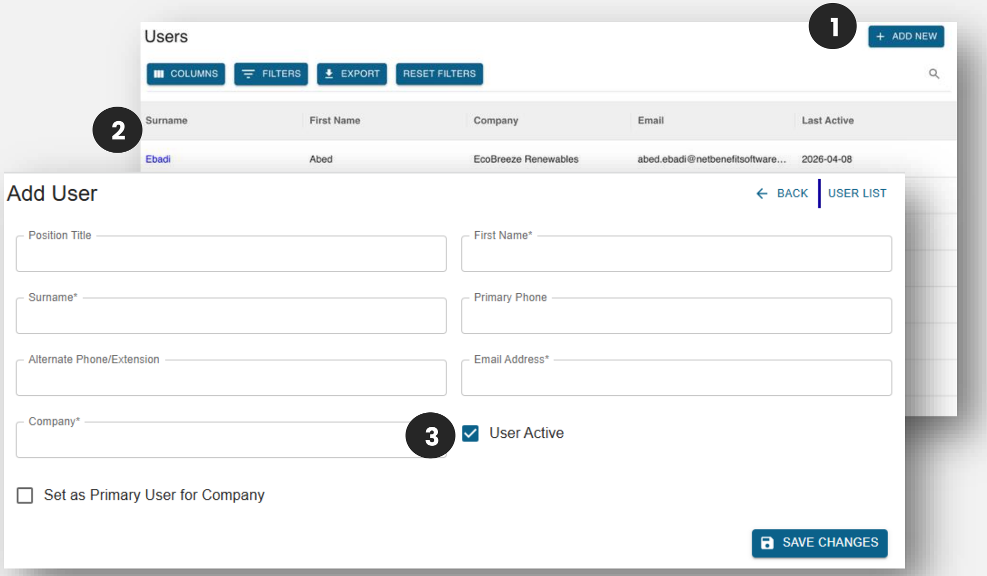
Company Profile > Manage Users

Definitions:

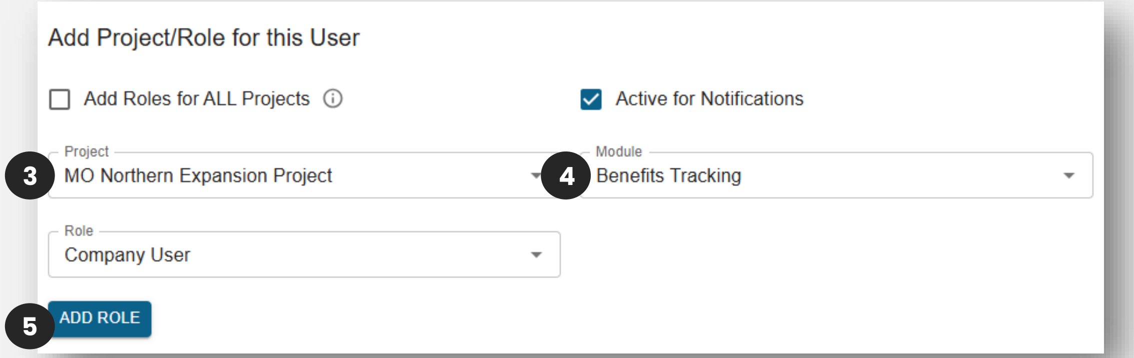
- **Company (Contractor) Users:** External companies required to report. Access is granted on a per project basis. If contractors are expected to report on multiple project, ensure permissions reflect.

Steps:

1. Click **Add New** to create a new user.
2. To manage an existing user, select the **User's Name.**
3. To remove user access, disable the **User Active Check Box.**
4. Users can be managed through the Company Profile as well.



Add Reporting Contractors: Permissions



Create Company (Contractor) User:

1. Select an *External Company* from the dropdown.
2. Save changes.
3. On the card below, assign access based on Projects.
4. Ensure **Benefits Module** and **Company User** are selected from the dropdowns.
5. Select **Add Role** to save.

Manage Contracts

Important Note:

This step is required for clients managing Contractors through Contracts only.

Platform Overview:

1. Navigate to the Contracts Page.
2. For New Contracts, select Add New.
3. Ensure Company Name, Contract Title, and Reporting Requirements reflect contract details.

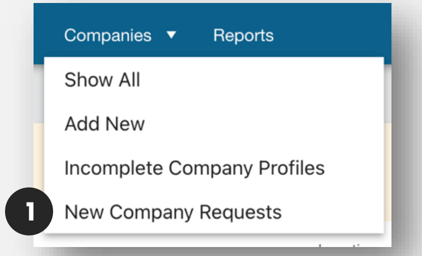
Manage Report Submissions

MANAGE EXTERNAL DATA

Step 1: New Company Requests

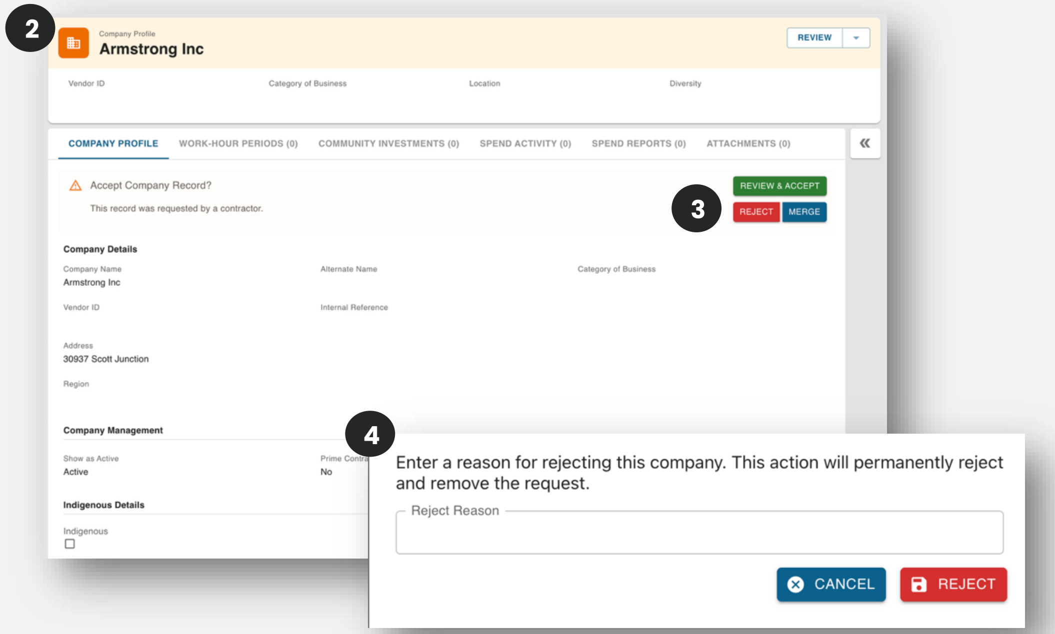
Key Action:

Manage new companies requested by reporting contractors.



Steps:

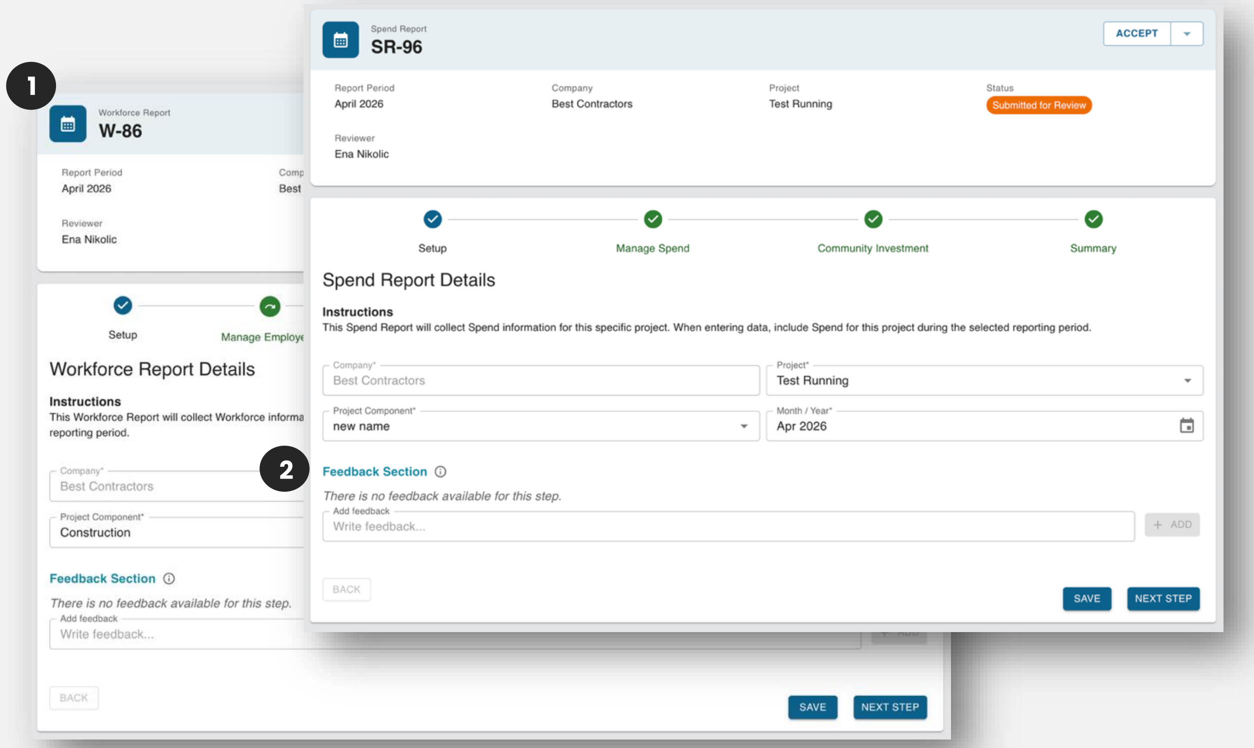
1. Go to **New Company Requests**. Select Company Name to open the profile.
2. A Company Profile in review will be highlighted in yellow with missing fields left blank.
3. Select **Review & Accept** to update missing fields and **Save Changes**. To find merge profiles, select **Merge**.
4. If a company is **Rejected,** enter a reason to share with your contractor.

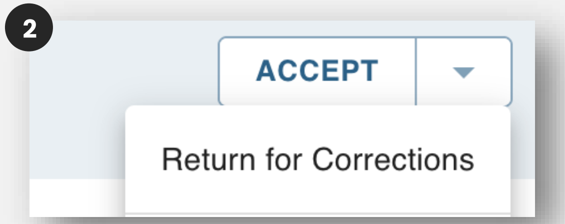


Step 2: Review Report Submissions

Steps:

1. Open a **Spend or Workforce Report.**
2. To add feedback, fill in the field in the **Feedback Section** and click **Add**.
3. To Return for Corrections, expand the **Quick Actions Dropdown** and select **Return for Corrections**.





5 Admin Management

Projects, Components, and Users Profiles

Manage Users

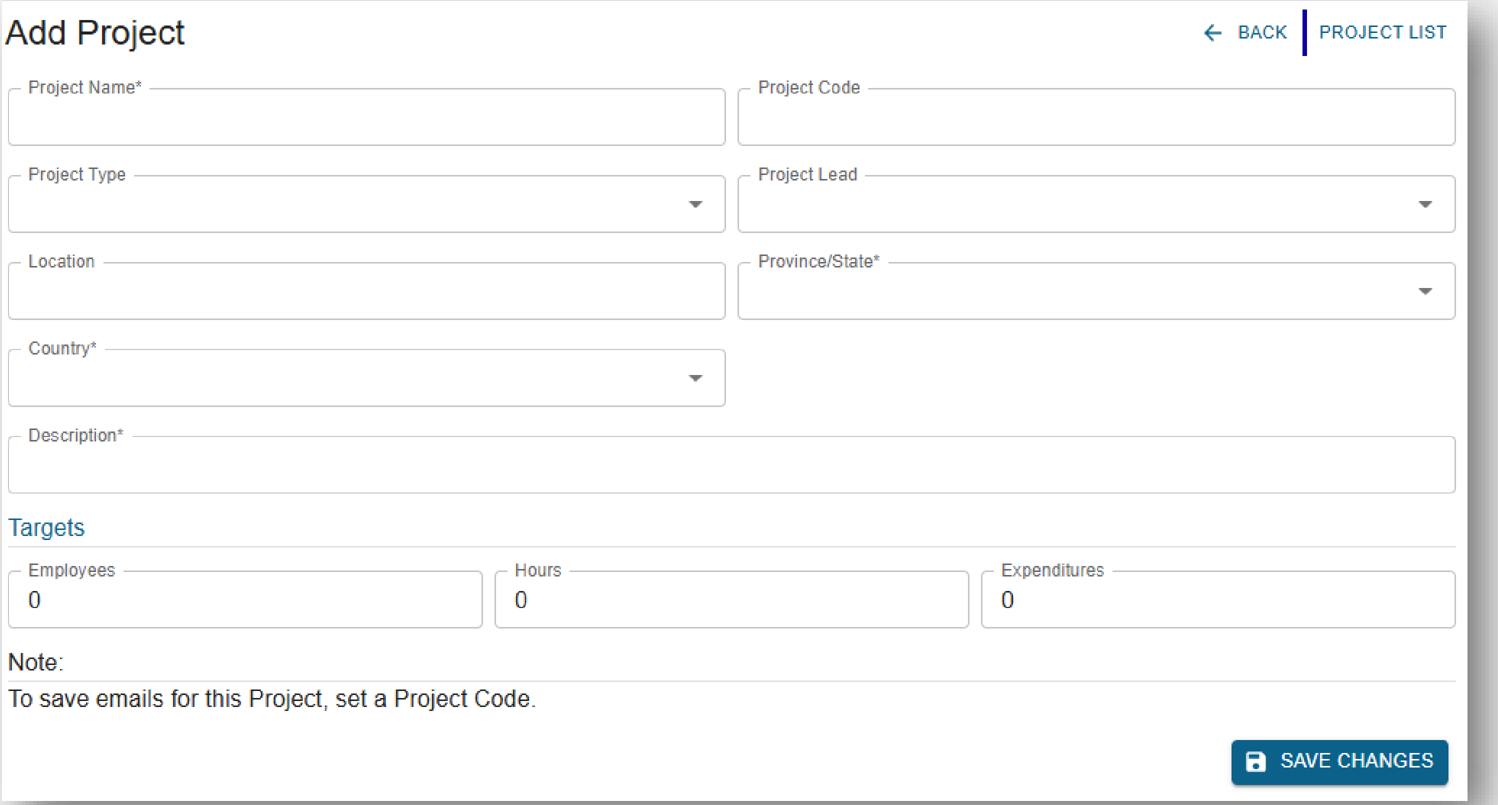
SET UP PROJECTS AND COMPONETS

Projects

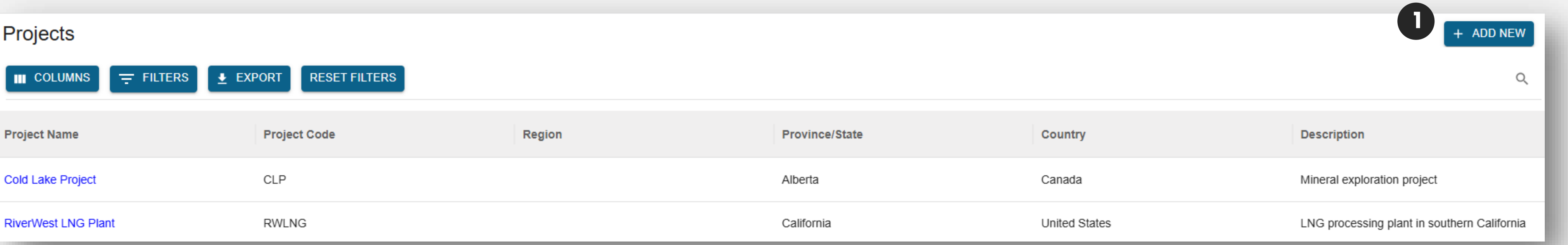
Go to Admin > Projects

Functionality:

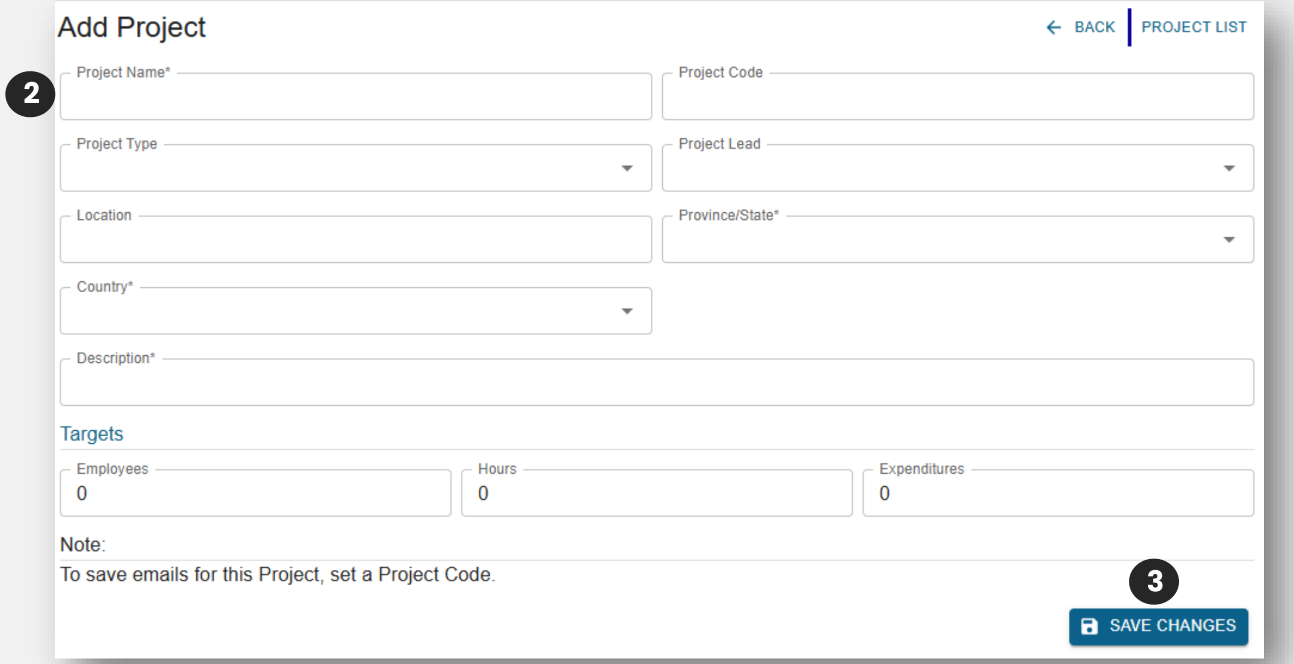
- Create new projects including project name, project code, description, and location information.
- Add project components such as construction and operation.
- Create/edit project targets.



Adding a Project

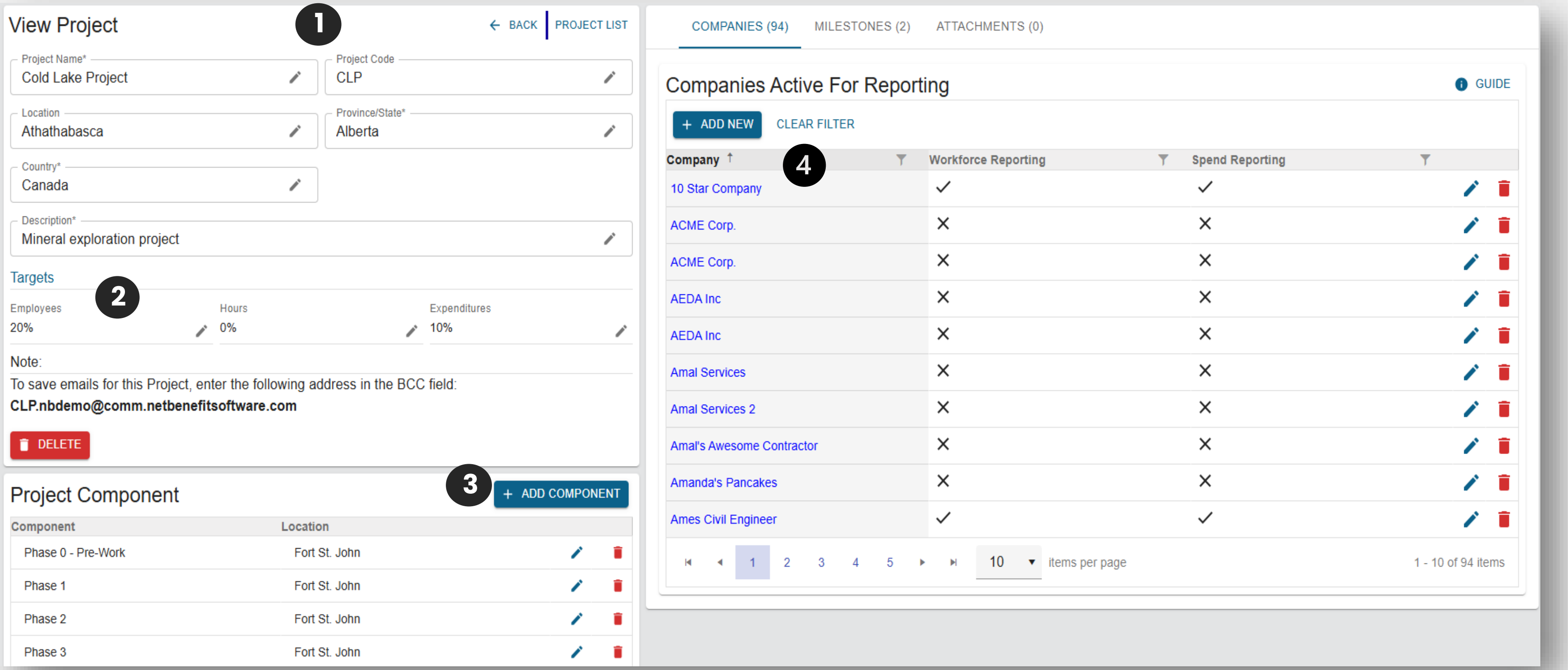


1. Click **Add New**
2. Enter relevant project details.
3. Click Save Changes



Managing a Project

1. Enter project details including name, project code, and location details. Click the pencil icon to edit.
2. Track project targets and baseline.
3. Add and manage project components.
4. Manage reporting companies involved with the project. Add new companies and turn on/off notifications.



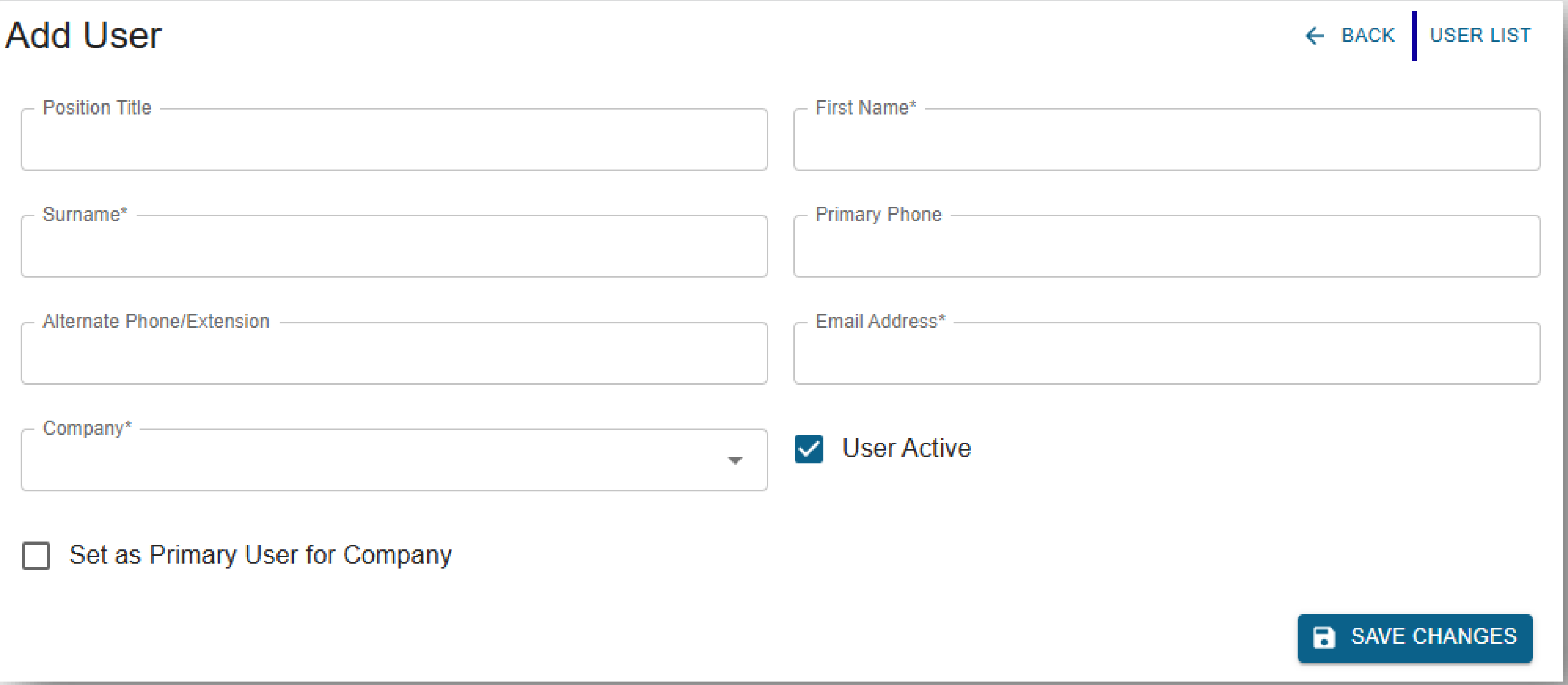
Manage Users

INTERNAL & EXTERNAL USERS

Users

Go to Admin > Users

- **Functionality:**
- Manage internal and external users.
- Assign user permissions for reporting.



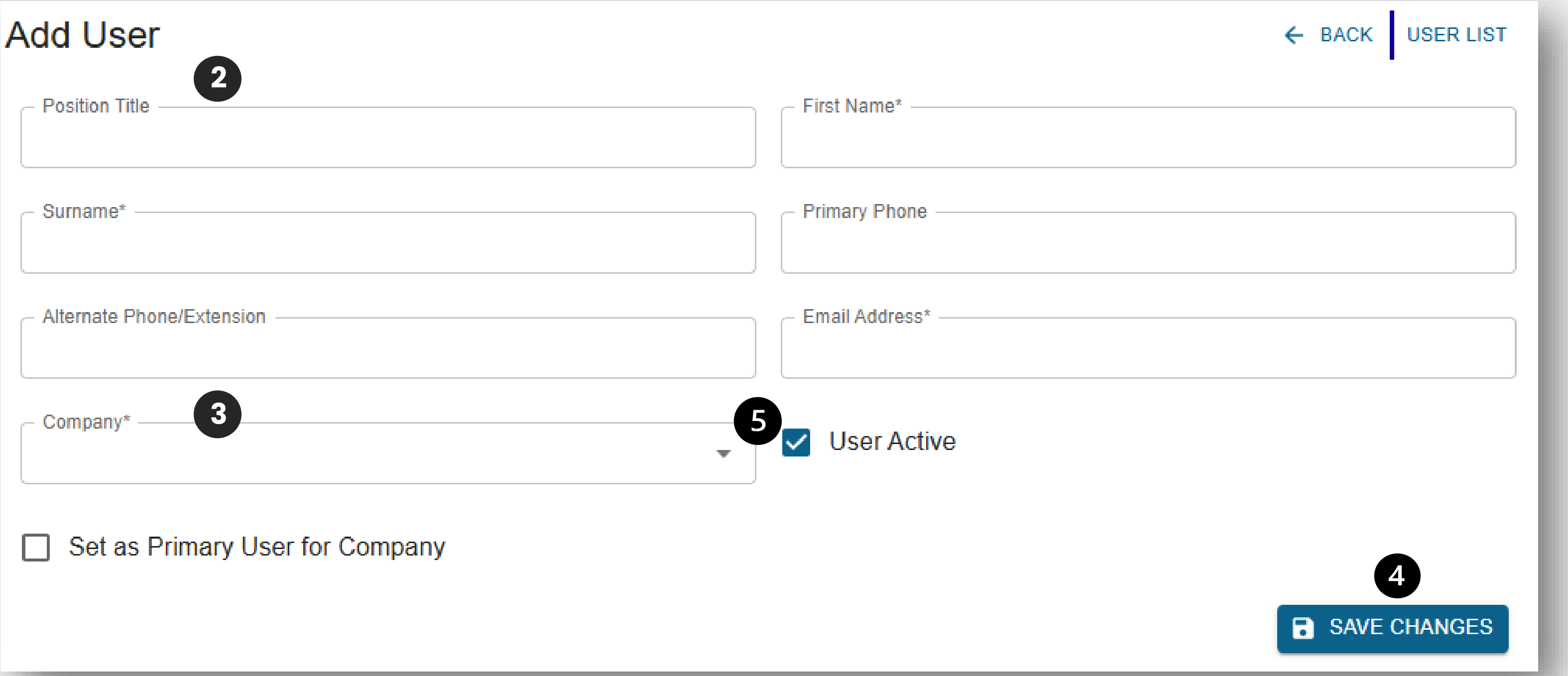
Creating/Removing User Access

Adding a User:

1. Go to **Users** and select **Add New**
2. Fill in user information
3. Select **Company**
4. Click **Save Changes**

Remove User Access:

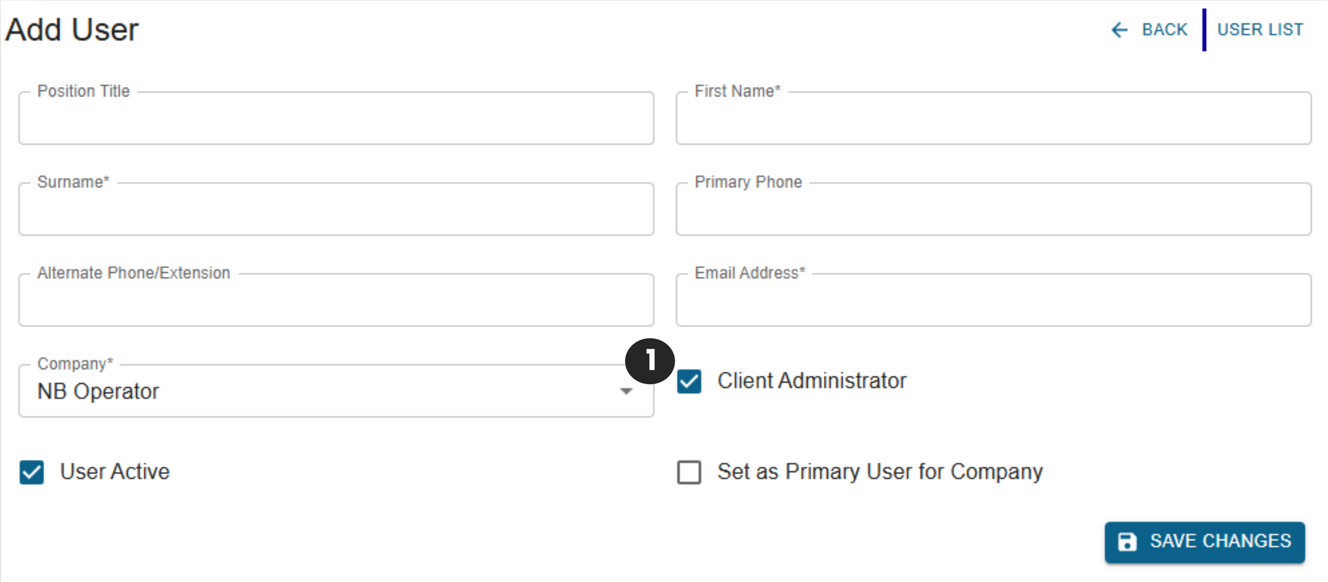
5. Unselect the **User Active** checkbox.

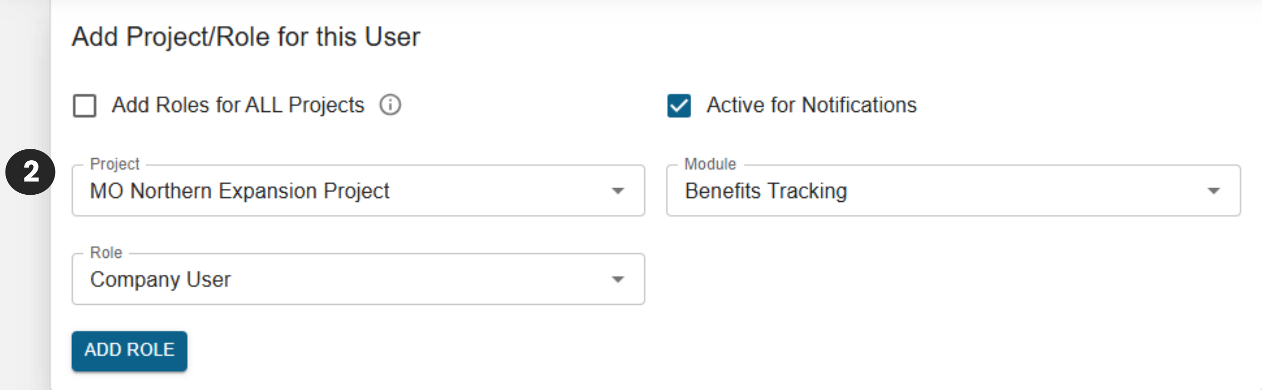


Internal User Types

1. **Client Administrator:** Full access to projects, records, and reports with ability to change settings and platform configuration.
2. **Client Power User:** Users can add or edit records based on project permissions. However, users will not be able to access reports or admin settings.

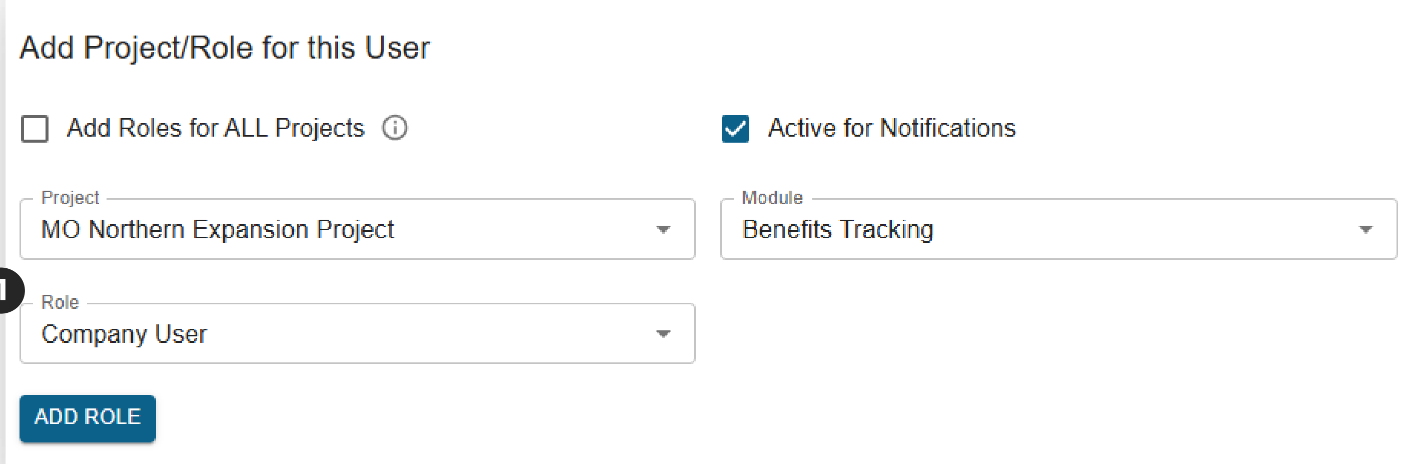
Note: Power User roles appear at the bottom of a user profile when Client Administrator checkbox is not selected.

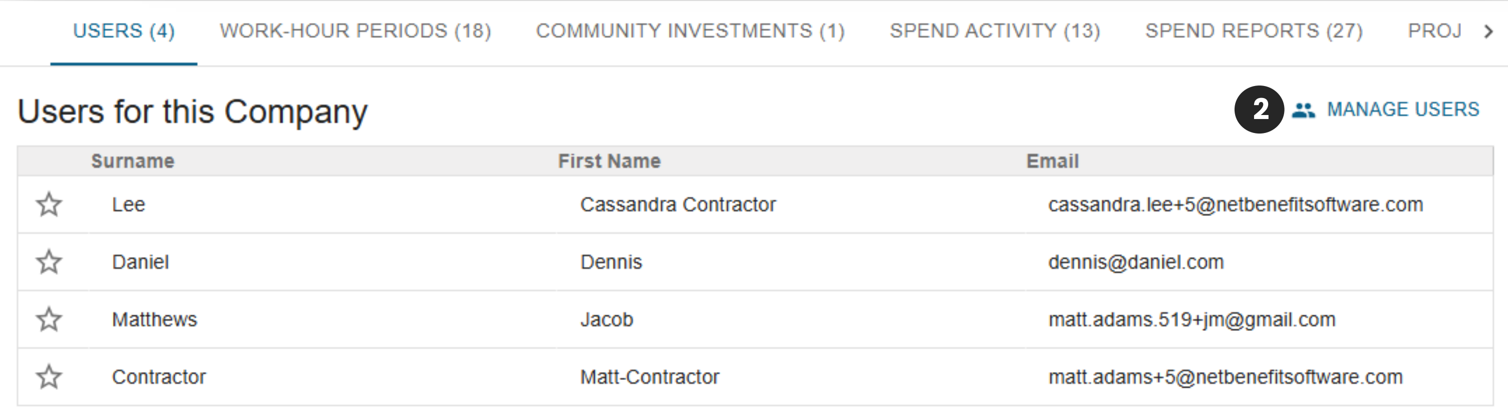




External (Company) Users & Permissions

1. **Contractor (Company) User:** Contractors assigned on a project level. If contractors are working on multiple projects, ensure permissions are reflected.
2. **Managing Company Users:** Visit the Admin Menu or the Company Profile.





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