CAMP IPPS 2016
CAMP TECHNOLOGY: CONNECTING PROCESSES

BUMT Trailhead—What’s Here and What’s Coming

Presented by Nikki Giaquinta

PC West: Bear Room | 12:30-1:15
SESSION AGENDA

1. What is the BUMT?
   1. Background and Concept
   2. What roles does it manage, in what applications?

2. What is the BUMT Administrator?

3. Upcoming changes to the BUMT
   1. What’s planned
   2. What’s the 1 thing we could do to make the BUMT easier?

4. QA
The Business Unit Management Tool (BUMT) was originally created in 2008 for Marketplace.

- The vision for Marketplace included access for UC San Diego employees.
- Result of focus groups with DSAs, Fund Managers, MSO’s.

New way to think about access and approvals:

- A consistent but flexible way for departments to manage their buying structures.
  - Accounts for the different structures and cultures of departments, while still maintaining controls and accountability.
  - Created ways to link funding sources with people (shoppers and approvers).
  - Created a way to aggregate multiple payroll department codes to a single department for easier management.
# THE BUSINESS UNIT CONCEPT

### Home Department In BUMT

<table>
<thead>
<tr>
<th>People and Roles</th>
<th>Business Unit 1</th>
<th>Business Unit 2</th>
<th>Business Unit 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Codes</td>
<td></td>
<td>Indexes</td>
<td>Indexes</td>
</tr>
<tr>
<td>Window Shoppers</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Delegated Roles</td>
<td>Approvers</td>
<td>Approvers</td>
<td>Approvers</td>
</tr>
</tbody>
</table>

- **People and Roles**:
  - Payroll Codes
  - Window Shoppers
  - Delegated Roles

- **Business Unit 1**
  - Indexes
  - Approvers

- **Business Unit 2**
  - Indexes
  - Approvers

- **Business Unit 3**
  - Indexes
  - Approvers
The Business Unit (BU) concept has proven valuable and repeatable.

- It’s created natural solutions for other IPPS applications, so it’s being referenced more and more.

- We’ll continue to evaluate how we can continue to leverage the BU concept for future development, and evaluate transferring other IFIS Template based approvals into the BUMT structure.
WHAT DOES THE BUMT LET YOU DO?

Manage Roles:
1. Marketplace Shopping Roles
2. Attachment Viewer
   • EC Manager, and “My”Apps
3. Attachment Administrator
   • EC Manager and “My”Apps
4. Department Head
   • Marketplace, MyPayments
5. BUMT Administrator – View Only

Manage Business Units:
1. Identify groups of Indexes:
   • Org
   • Fund/Org
   • Project
   • Index
2. Associate Approvers
   • Marketplace Approvers ($ ranges)
   • MyPayments Approvers
**Marketplace Roles:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Purchasing Limit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Buyer 5,000</td>
<td>$5,000</td>
<td>Can purchase up to $5,000 dollars on home department's Index without approval</td>
</tr>
<tr>
<td>Department Buyer 2,500</td>
<td>$2,500</td>
<td>Can purchase up to $2,500 dollars on home department's Index without approval</td>
</tr>
<tr>
<td>Department Buyer 500</td>
<td>$500</td>
<td>Can purchase up to $500 dollars on home department's Index without approval</td>
</tr>
<tr>
<td>Index-Informed Shopper</td>
<td></td>
<td>Assigns Index and Submits Cart</td>
</tr>
<tr>
<td>Window Shopper</td>
<td></td>
<td>Shops in Marketplace</td>
</tr>
</tbody>
</table>

The image shows a visual representation of the roles and their respective purchasing limits in the marketplace.
DETAILED VIEW OF ROLES

• Attachment Viewer (EC Manager, and “My”Apps)
  • Provides view-only access to attachments for individuals not already involved with the transaction

• Attachment Administrator (EC Manager, and “My”Apps)
  • Provides the ability to add/remove attachments for individuals not already involved with the transaction

• Department Head (MyPayments and more)
  • Certain payment types (awards, gifts, prizes) require additional approval from the Department Head
  • Department Head is also referenced in an annual Delegation of Authority Audit

• BUMT Administrator – View Only
  • Has view-only access to the BUMT and can view how their department has been configured
WHAT IS A BUMT ADMINISTRATOR?

Role and Responsibilities

- Someone identified by the Department Head or Chief Business Officer as responsible for managing and maintaining their Department’s configuration in the BUMT
  - May be the Department Head, MSO, DSA, Fund Manager, etc.
  - Requires a signed Delegation of Authority form and completion of BUMT training
- Department configuration in BUMT should mirror and support how your department does business
  - Roles are delegated in a way that support employee job functions
  - Evaluate the right mix of Department Buyers vs. Window/Index Informed Shoppers
  - Structure Business Units to reflect natural divisions in responsibilities/workload in your department
WHAT IS A BUMT ADMINISTRATOR?

Role and Responsibilities

- BUMT Administrators are responsible for ensuring:
  - The roles delegated are being used responsibly
  - Training has been completed for roles that involve a purchasing delegation
  - Removing roles when employees leave your department
  - Working with IPPS if there are any changes to the payroll codes associated with your department
WHAT’S COMING?

The BUMT is getting a facelift!
Welcome Nicole Rose Giaquinta

The Business Unit Management Tool (BUMT) defines access, roles and approvals for Marketplace, MyPayments, and ECManager. BUMT Administrators can manage and maintain the BUMT on behalf of your department.

Your role is a: BUMT Administrator

Questions? Review BUMT information on Blink, or submit a case in BSsupport.

Your Department(s):

<table>
<thead>
<tr>
<th>Department Name</th>
<th>Admin and Shopper Roles</th>
<th>Approvers and IFOP</th>
<th>Download All Dept. Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business and Financial Services</td>
<td>Edit Roles</td>
<td>Edit Business Units</td>
<td></td>
</tr>
<tr>
<td>Geology</td>
<td>Edit Roles</td>
<td>Edit Business Units</td>
<td></td>
</tr>
</tbody>
</table>
Roles Overview for Department: Business and Financial Services

Interested in learning more about a specific role? See Blink for definitions associated with each role.

**Available Actions:**
- Add/Edit Shopper and Admin Roles
- View Associated PPS/Department Codes
- View Other Department Info

### People Roles

<table>
<thead>
<tr>
<th>Name</th>
<th>Assigned Role</th>
<th>Email</th>
<th>Assigned By</th>
<th>Date Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMS, TODD D</td>
<td>Inventorial Equipment</td>
<td><a href="mailto:tdsadams@ucsd.edu">tdsadams@ucsd.edu</a></td>
<td>mthmg</td>
<td>12/6/2009 10:04</td>
</tr>
<tr>
<td>ADAMS, TODD D</td>
<td>Buyer IV</td>
<td><a href="mailto:tdsadams@ucsd.edu">tdsadams@ucsd.edu</a></td>
<td>mthmg</td>
<td>12/6/2009 10:04</td>
</tr>
<tr>
<td>ADAMS, TODD D</td>
<td>Program Administrator (view only)</td>
<td><a href="mailto:tdsadams@ucsd.edu">tdsadams@ucsd.edu</a></td>
<td>mthmg</td>
<td>02/19/2010 08:27</td>
</tr>
<tr>
<td>ADAMS, TODD D</td>
<td>Index Informed Shopper</td>
<td><a href="mailto:tdsadams@ucsd.edu">tdsadams@ucsd.edu</a></td>
<td>mthmg</td>
<td>02/02/2010 13:45</td>
</tr>
<tr>
<td>ALBRANDT, KATRINA M</td>
<td>Index Informed Shopper</td>
<td><a href="mailto:kaibrandt@ucsd.edu">kaibrandt@ucsd.edu</a></td>
<td>mtsaw</td>
<td>12/12/2008 14:53</td>
</tr>
<tr>
<td>ALCARAS, ESTHER D</td>
<td>Settlement Specialty Approver</td>
<td><a href="mailto:ealcaras@ucsd.edu">ealcaras@ucsd.edu</a></td>
<td>mtsaw</td>
<td>12/6/2009 10:20</td>
</tr>
<tr>
<td>ALCARAS, ESTHER D</td>
<td>Index Informed Shopper</td>
<td><a href="mailto:ealcaras@ucsd.edu">ealcaras@ucsd.edu</a></td>
<td>mtsaw</td>
<td>09/14/2008 15:07</td>
</tr>
<tr>
<td>ALMINAR, SUSANA A</td>
<td>Department Head</td>
<td><a href="mailto:sarminar@ucsd.edu">sarminar@ucsd.edu</a></td>
<td>gao,jh</td>
<td>06/20/2014 13:06</td>
</tr>
<tr>
<td>ALMINAR, SUSANA A</td>
<td>Department Buyer - 500</td>
<td><a href="mailto:sarminar@ucsd.edu">sarminar@ucsd.edu</a></td>
<td>gao,jh</td>
<td>06/19/2009 09:19</td>
</tr>
</tbody>
</table>
Overview of Business Unit: Purchasing - Marketplace

Business Units are groupings of Indexes and Individuals authorized to approve transactions against those Indexes in Marketplace and MyPayments.

To make changes to this Business Unit, select from the Available Actions on right.

Available Actions:
- Add/Edit Approvers for this Business Unit
- Add/Edit Indexes included in this Business Unit
- Rename this Business Unit
Questions?
Feedback?
Don’t forget to stop by and visit us in the

Price Center East Ballroom