MFMP Change Review Board Meeting

Meeting Information	
Meeting Title:	MFMP Change Review Board Meeting
Occurrence:	March 10th, 2016
Time:	3:00pm – 4:00pm
Location:	Department of Management Services, Room 101

Attendees		
#	**Entity**	**Name**
1.	DCF	Paul Mauck
2.	DEP	Janice Pursley
3.	DFS	Allyson Adolphson
4.	DFS	Gloriann McInnis
5.	DFS	Sean Cooley
6.	DMS MFMP	Bruce Roberts
7.	DMS MFMP	Eric Swanson
8.	DMS MFMP	Jillian Green
9.	DMS MFMP	Judson Freeman
10	DOH	Doug Black
11	DOR	Grace Sumpler
12	DOR	Robin Holley
13	DOT	Joyce Plummer
14	FDC	Anne Rabon
15	FDC	Kasey Faulk
16	FDC	Trueby Bodiford
17	FWC	Jackie McNealy
18	FWC	Sharon Bussey
19	HSMV	Cricket Lee
20	MFMP	Jeremy Kong
21	MFMP	Michael Jackman
22	MFMP	Robert Cooper III

Topic #	Agenda Topic Description
1.	CRB Organization
2.	Completed CRs - CR 283 Punchout Catalog Audit o Punchout Audit Price Discrepancy Report
3.	CRs In Progress
4.	CRs for Consideration
5.	Wrap up

Meeting Minutes for Topics	
Topic #	**Minutes for Topics**
	CRB Organization Each agency provided MFMP with a primary and backup member. If the primary representative is unable to attend a Change Review Board (CRB) meeting, they should send their designated backup. These primary and backup representatives are at the Purchasing or Finance and Accounting Director level to ensure an enterprise perspective when reviewing enhancement requests. If a CRB member agency does not submit votes or send a representative for 2 quarterly meetings in a row, the agency will be removed and replaced with an agency that has expressed interest in joining the group. CRB members or delegates will be asked to participate in design teams for changes. The agenda and meeting minutes from today's meeting can be found under Agency Customer Meeting Materials on the DMS website.
1.	
	Completed CRs

CR #	Description	Hours	Implementation Date
290	Update VIP CBE selection to be read-only	No Cost (Under 40)	October 29, 2015
216	Update the Transaction Fee Percentage	280	October 29, 2015
283	Punchout Catalog Pricing Audit Functionality	350	January 28, 2016

CR 290 was a request from the new director of the Office of Supplier Diversity (OSD). |
2.	
	CR 283 – Punchout Catalog Audit Punchout Audit enables Contract Managers to monitor the content and pricing available on a supplier's punchout catalog. MFMP added functionality that will compare the price retrieved from a supplier's punchout catalog to the corresponding State Term Contract pricing sheet.
3.	

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	When a monitored punchout catalog item is evaluated, the following rules are applied: | Punchout Catalog Item:	Requisition Line Item Price:	Contract Manager is:
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Greater than price sheet	Reduced to the base price from the price sheet	Added as 'Watcher'
Less than price sheet	Honored	Added as 'Watcher'
Not Found on price sheet	Honored	Added as 'Watcher'
Matches price sheet	N/A	N/A	 **Example:** A requester creates a requisition from a punchout catalog and the price is $45.50 for an 'Insulated Crimper.' in the supplier's punchout catalog. However, the price on the price sheet is $30.00. When the item is transferred into MFMP, MFMP compares the price from the punchout catalog to the price sheet and updates the line item price to $30.00. A warning message is displayed to inform requesters of the price discrepancy. No actions are required from requesters. The Contract Manager is added as a 'Watcher' to the requisition approval flow. Adding the Contract Manager as a watcher will not impede the process. The functionality for punchout catalog audit is available in MFMP; however, MFMP has not enabled any punchout catalogs for monitoring. MFMP is currently developing a punchout catalog "roll-out" plan. Agency customers will receive communications during the punchout catalog "roll-out" procedures. MFMP will be working with DMS State Purchasing Leadership and Contract Managers to enable specified punchout catalogs for audit. **Punchout Audit Price Discrepancy Report** MFMP also developed a "Punchout Audit Price Discrepancy Report" report to allow Contract Managers to view and assess requisitions that have been 'flagged' due to item and/or price discrepancies. The report will be delivered on the DMS Secure Reports website. The report includes helpful data including Agency Name, Requisition #, Price, Supplier Part #, Punchout Catalog Price, Contract Price on File, Contract Manager, and more.

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	Q: What if the price changes while the requisition is going through the approval flow? If this functionality reduces the price but the higher price was correct, then the vendor may reject the purchase order. **A:** MFMP is working with State Purchasing to work out the logistics of when State Purchasing approves the pricing file. The goal is to have the pricing file updated as close to real time as possible to prevent issues like that. **Q:** So, State Purchasing will not approve a pricing change to the vendor until they have approved it in MFMP? **A:** Yes, that is correct. A pricing change for a punchout catalog should not happen without the Contract Manager being aware. All price augmentations have to be communicated and approved by State Purchasing and the Contract Manager. This enhancement is a mechanism to identify when that does not happen. FDC requests that Office Depot not be the pilot punchout catalog since Office Depot will have a widespread impact from a requester perspective. **Q:** When the pricing change occurs, does that create a new version of the MFMP contract? **A:** No, it will not impact the MFMP contract that the requisition is tied to. This is additional validation on punchout only and will not version the contract each time a pricing change is made. **Q:** Will there be anything in the history that indicates a pricing change has occurred? **A:** No, there is nothing currently in the history tab to indicate a change in the line item. MFMP is looking into providing a record of changes in the history tab. At this time, the mechanism to track the history of pricing changes is the punchout audit discrepancy report. The report was originally designed to be distributed to DMS State Purchasing. MFMP is also looking into updating the report to be distributed to all agency customers.
4.	**CRs In Progress** | CR #	Description	Hours	Implementation Date
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271	Add a special approver by commodity code and total PR amount	192	March 2016
298	Increase email address character limitation on address change eForm	No Cost (Under 40)	March 2016
299	Update advanced search default values in VIP	No Cost (Under 40)	TBD
181	Create an eForm to update MFMP encumbrances in FLAIR	600	TBD	

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	CR 271 Previously, special approvers could be added if a line item exceeded the dollar threshold amount. This enhancement adds the ability to include a special approver based on the commodity code and based on the total PR amount. CRB participants will receive an invitation for CR 271 design discussions on Friday, March 11, 2016. MFMP utilizes the CRB members for design discussion and UAT testing. **CR 298** Due to naming conventions or long domain names, some agencies have emails that exceed the address eForm limit of 30 characters. Because of this, requesters submit a requisition and the vendor does not receive the full email address. This CR resolves that issue by extending the character limit to accommodate longer emails. **Q:** DOH is experiencing an issue with Office Depot. Office Depot claims they cannot make deliveries based on the address provided in the purchase order. Office Depot has their own system that cuts off the address after a certain number of characters. Then Office Depot will call DOH and request to change the address or provide the full address. If the complete and correct address appears on the PO, why do we have to modify the address to accommodate them? A CRB attendee also mentioned that this happens with Staples. **A:** Vendors like Staples and Office Depot use an electronic data interchange (EDI) system to fulfil their orders. That system may be truncating the address. MFMP will reach out to these vendors to gather more information. Please email any examples to MFMP. **CR 271 - Add a special approver to a requisition approval flow by commodity code and total requisition amount** Currently, there are requisition approval rules that will add approvers by PUI, Commodity Code, and the dollar amount on a line item. Example: IT Approver, Fleet Approver, etc. Many agencies; however, require their 'Legal Approvers' to approve requisitions tied to specific commodity codes when the total requisition dollar amount exceeds a certain threshold, typically $65,000. This enhancement will add a new approval rule that will add an approver by role (Ex. Legal Approver) to a requisition by commodity code and the total requisition dollar amount. Agencies may take advantage of this new approval rule by submitting a Workflow Update Request beginning April 2016. **Q:** Will this change the existing functionality that allows Legal Approvers to be added when line items exceed the dollar threshold? **A:** No, this is in addition to the existing functionality and provides agencies the option to enable it if desired. **Q:** If an agency wants to change/add special approvers, does that require an ODU request? **A:** It would require a workflow update ODU request.

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	A communication will be sent in the near future with more details on CR 271, including how to make a workflow change request and how the enhancement works. **Q:** How does an agency find who their current approvers are or what their current role mappings are? **A:** Agencies can send a request to the help desk to obtain that information. **Q:** Will a communication be sent out providing instructions on how to add a special approver? **A:** Yes, a communication will be sent out to provide the name of the workflow rule, its position in the node and the data required in order to make a change or update. **Q:** Is there a limit to how many specific approvers an agency can have? **A:** No, there is not a limit. Please note that legal approver was the driver of this change request, but it is not limited to only legal approvers. Agencies may configure this to apply to any role. **Q:** What happens if an agency has a commodity code that requires two different types of approvers? For example, an IT approver and a legal approver. Will they be added in parallel? **A:** Yes, both approvers will be added in parallel. However, if there are two commodity codes tied to a single type of approver and both commodity codes are on the same requisition, the approver will only be added one time.
	CRs for Consideration | CR/Ticket #	Description	Hours
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158	Rename 'Service Disabled Veterans' in MFMP	100
293	No approval flow for change PRs that don't alter the overall dollar amount by a certain threshold	100
291	Only add the OBO to the approval flow on change orders when the OBO is the only change on the PR	120
294	Add Method of Procurement (MOP) to Sourcing	TBD
295	Add password validation functionality to the FLAIR Login eForm	TBD
93432	Allow selection of family level commodity codes in MFMP	TBD	 **CR 293** This enhancement prevents the requisition from having to go through the approval flow
5.	again when the dollar amount does not exceed a threshold.

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	Q: Would this be an enterprise wide threshold? Or would each agency be able to designate their own threshold? **A:** MFMP has discussed allowing each department or OLO to designate their own threshold. The default threshold would be set at zero. At this time, MFMP has not decided if it will be by department or by purchasing unit. **Q:** Would this be tied to the CO No Workflow role or would it be separate? **A:** MFMP will check to verify, but MFMP believes this would be separate from the CO No Workflow role. See the 'Action Items' section for follow up. **Q:** If an agency requests another field, would it be cheaper to have it apply to the CO No Workflow role? **A:** It may provide some savings since there would be similar testing cycles. Please submit any requests to MFMP. **CR 295** This enhancement adds validation when passwords are changed in MFMP. The system would validate that it is the same password in FLAIR. **Ticket #93432** At this time, MFMP only allows selection of class and commodity codes. This enhancement would add the ability to select at the family level as well. **Q:** Would this be limited to pharmaceutical codes only? **A:** No, if this enhancement is implemented then it will apply to all commodity codes. **Q:** Does this apply to the search function or to reports? **A:** This enhancement applies to the search function and would allow family level codes to be added to requisitions. When the commodity code set was updated last year, a large number of pharmaceutical codes provided more granularity than agencies required. Those agencies would rather create a requisition at a higher level. FDC discussed the following change requests to gauge interest from other agencies. FDC would like to add the requester's contact information (email and phone number) on the purchase order. FDC receives phone calls from vendors who do not know how to contact the requester, unless the requester puts their contact information in the comments section or a free text field, but a lot of requesters forget. DFS has a need for this field as well. DFS would like an available list of all Contract Managers but there currently isn't a way to obtain this information. It would also be good if that field could report to FACTS as well.

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	FDC recently centralized and consolidated their PUIs. Kasey approves for 3 different PUIs, but also approves as Kasey Faulk. Currently, Kasey has thousands of requisitions in her queue but she cannot tell if they are under her name or under those PUIs. Currently, the only way she can tell is to run a report and see what is pending. She can search after they are approved by using the *Approved By* field, but she cannot see what is currently awaiting approval under her name. Please add a field to the system search to allow requesters to search by role or by user. DEP notes that it becomes more difficult if a requester has more than one role. DEP uses a gatekeeper, which sees everything. FDC does not use a gatekeeper and each item is assigned to a particular agent. MFMP requests that FDC submit both change requests so they can be logged. **Q:** Is there a way to see what commodity codes are linked to 5 series object codes? **A:** Please verify that the vendor is using the correct commodity code. If they are not, MFMP can work with the vendor to select a more appropriate commodity code. If it is the correct code, the commodity code to object code mapping may have to be updated. In the past, MFMP has made changes to the commodity code to object code mapping based on agency feedback. MFMP also could ask DFS to audit the current mapping to make sure it is appropriate. Ultimately, MFMP will have to work with DFS as they are the final gatekeeper.
6.	**Wrap Up** As a reminder, MFMP posts a monthly Change Request list on the MFMP website under Meeting Materials. Please visit the following link to view the most recent Change Request list: MyFloridaMarketPlace Change Request List If you have further questions please contact the MFMP team at MyFloridaMarketPlace@dms.myflorida.com. Please note that the Q4 meeting, scheduled for May 26th, 2016 at 10:00am, will be a voting meeting. If agencies have any other enhancements to discuss at the Q4 meeting, please email Judson Freeman. Please submit any enhancements at least a month and a half before the meeting.

Action Items					
#	**Action Item Description**	**Assigned To**	**Status**	**Due Date**	**Comments**
1.	Submit change requests to MFMP.	FDC	Complete	N/A	
2.	Provide MFMP with examples of vendors who report that addresses are being truncated/incomplete.	DOH			
3.	Reach out to vendors reporting that addresses are being truncated/incomplete.	MFMP	Complete		
4.	CR 293 question follow up to the following question: Would this (CR 293) be tied to the CO No Workflow role or would it be separate?	MFMP	Complete		We plan to leverage the "CO No Workflow" group and functionality for this enhancement. In summary, we will add a "Change Order Amount Tolerance" percentage value that is configurable by agency PUI in the Buyer application. Additionally, the "CO No Workflow" functionality will be updated to include new logic that will determine if an agency has opted to use the new "Change Order Amount Tolerance". If an agency has opted in and the customer initiating the change has the "CO No Workflow" group, the "CO No Workflow" process flow will determine if the total amount changed on the order exceeds the "Change Order Amount Tolerance" recorded for the agency. If the dollar amount doesn't exceed the tolerance, no approval flow will be generated on the change order.

Action Items

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5.	CR 283 – Punchout Catalog Audit	MFMP			MFMP will investigate adding a record in the history tab when an item price from a punchout catalog is modified.