MFMP Change Review Board (CRB) Meeting

Meeting Information	
Meeting Title:	MFMP Change Review Board (CRB) Meeting
Occurrence:	August 16th, 2016
Time:	10:30am – 11:30am
Location:	DMS, Room 101, 4050 Esplanade Way, Tallahassee, FL, 32399

Attendees		
#	**Entity**	**Name**
1.	DCF	Paul Mauck
2.	DEP	Janice Pursely
3.	DEP	Lydia Louis
4.	DEP	Rebecca Hale
5.	DFS	Brendan Jones
6.	DFS	Gloriann McInnis
7.	DOH	Bill Zimmerman
8.	DOH	Doug Black
9.	DOR	Grace Sumpter
10.	DOR	Tammy Bauldree
11.	DOT	Joyce Plummer
12.	DOT	Sherill Johnson
13.	DOT	Tobetha Jones-Brown
14.	FDC	Anne Rabon
15.	FWC	Jill Reynolds
16.	FWC	Rachel Bozeman
17.	HSMV	Cricket Lee
18.	MFMP	Chenee' Freeman
19.	MFMP	Felicia Thompson
20.	MFMP	Jeremy Kong
21.	MFMP	Robert Cooper III
22.	MFMP DMS	Bruce Roberts
23.	MFMP DMS	Jillian Green
24.	MFMP DMS	Judson Freeman
25.	MFMP DMS	Tyler Brown

Topic #	Agenda Topic Description
1.	CRB Organization
2.	Completed CRs
3.	CRs in Progress
4.	Current CRs for Consideration • Standard Reports
5.	Wrap Up

Meeting Minutes for Topics	
Topic #	**Minutes for Topics**
1.	**CRB Organization** Each agency provided MFMP with a primary and backup member. If the primary representative is unable to attend a 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.
2.	**Completed CRs** The following CR(s) have been implemented in MFMP: TABLE_PLACEHOLDER **CR 181 – Create an eForm to update MFMP encumbrances in FLAIR** If a warrant is cancelled or an encumbered disbursement fails Central FLAIR, the encumbrance is reduced in FLAIR but there is no way to restore the funds through MFMP. This eForm will provide F&A customers the ability to update the MFMP encumbrance. Please note that this eForm does not replace a change order. Customers may not use this eForm to increase the amount on a requisition. Customers can only decrease the amount or update a line item in the event that the incorrect line item was paid. In that case, funds can be restored back to a line item and then decreased on the incorrectly paid line item. **Q:** Has CR 181 already been implemented? **A:** Yes, CR 181 has been implemented.

The completed CRs table referenced above:

CR #	Description	Hours	Implementation Date
181	Create an eForm to update MFMP encumbrances in FLAIR	600	May 26, 2016
275	Auto-add vendors to eQuote events by contract	220	May 26, 2016

Meeting Minutes for Topics	
Topic #	**Minutes for Topics**
	Q: Was a communication sent to notify customers about the implementation? **A:** Yes, a communication was sent on Friday, May 27th, 2016 with the subject *Attention: New eForm now available in MFMP.* **CR 275 – Auto-add vendors to eQuote events by contract** This enhancement is for MFMP Sourcing, targeting the eQuote side of the application. This enhancement will allow MFMP to automatically add vendors to an eQuote event by their tax ID. Each tax ID can have one or more vendors associated to it. All the vendors associated with the randomly selected tax ID will be added to the eQuote event. Customers will have the ability to remove the selected vendors if they choose. Please note, this functionality has not been activated on any contracts yet.
3.	**CRs in Progress** The following CR(s) were prioritized at the last voting meeting and have been approved for implementation in MFMP: <table><tr><th>CR #</th><th>Description</th><th>Hours</th><th>Implementation Date</th></tr><tr><td>291</td><td>Add OBO only to the approval flow on Change Orders</td><td>120</td><td>September 2016</td></tr><tr><td>295</td><td>Add password validation functionality to the FLAIR Login eForm</td><td>500</td><td>November 2016</td></tr></table> **CR 291 – Add OBO only to the approval flow on Change Orders** In DEP's petroleum program, customers often change the OBO field on change orders to represent a change in the site manager. Changing the OBO field will currently regenerate the entire requisition workflow for approval. This enhancement would only require the OBO user to approve a change order when the OBO field is the only change made on the requisition. This enhancement is configurable, giving each agency the ability to set whether or not the OBO user is required to approve the requisition. This enhancement would leverage the CO No Workflow group to ensure that only select users can skip the full approval flow. **CR 295 – Add password validation functionality to the FLAIR Login eForm** This enhancement would add functionality to the existing FLAIR Login eForm that will confirm that the FLAIR login credentials recorded in MFMP match the credentials in FLAIR. Currently, there is no functionality within the FLAIR Login eForm that will validate that the FLAIR username and/or password entered on the eForm matches the data on record in FLAIR. This would help reduce the number of transactions that fail because of incorrect credentials.

Meeting Minutes for Topics	
Topic #	**Minutes for Topics**
	Q: How will the password be validated? Will the requester receive an email? **A:** MFMP will pass the username and password entered in the eForm to FLAIR to validate. If the credentials are correct, the eForm will update and provide confirmation in the comments section. If the credentials are incorrect, the eForm will update and provide an error message in the comments section and the user that submitted the eForm will receive an email. **Q:** How does the password validation process change when users have access to multiple FLAIR accounts? **A:** If a user has multiple FLAIR accounts per site code, the user will have to submit an eForm for each set of credentials. **Q:** Who will receive the email if a user has access to multiple FLAIR logins? **A:** The user who creates the eForm will receive the email. **Q:** What is the timing on the password validation? **A:** The validation will happen in real time and provide feedback as soon as the form is submitted. **Q:** Our agency has a user who resets all the FLAIR passwords for the site code. How will this validation impact a user like this who has all the credentials? **A:** The eForm will validate each set of credentials one by one. The password validation functionality analyzes the username and password submitted, not the user submitting the eForm. **Q:** How many times can a user submit this eForm before they are locked out? **A:** There is no restriction on how many eForms a user can submit but FLAIR will lock the account after multiple failed login attempts. Then the user will have to remove that revocation in FLAIR.

CRs for Consideration
The following CR(s) are being considered for future CRB voting sessions:

CR/Ticket #	Description	Hours
CR 301	Add watcher by contract number to a requisition approval flow	180
CR 302	Add contract manager role to the IR approval flow for service related invoices	180
Ticket #104201	Send email notifications to all approvers when a requisition is denied by FLAIR	TBD
Ticket #81025	Add functionality for reducing the PO Balance	TBD
Ticket #104346	Enable Standard Reports in the Buyer application	TBD

CR 301 – Add watcher by contract number to a requisition approval flow
This enhancement from AST would allow a watcher role to be added to the approval flow on STC/ACS requisitions or tied to specific commodity codes with a dollar amount threshold. Please note that this watcher will be added in parallel to the approval flow and should not hold up any approval flow processes.

CR 302 – Add contract manager role to the IR approval flow for service related invoices
FLAIR requires a Contract Manager to certify that services have been rendered on invoices. This works when the Contract Manager is also the requester. However in some cases the Contract Manager is not the Requester, like at FDVA. This enhancement would add a Contract Manager role to service related invoice approval flows. This would allow multiple users within that role to act on that invoice reconciliation, not just the one listed Contract Manager.

Ticket #104201 – Send email notifications to all approvers when a requisition in denied by FLAIR
This enhancement from DEA would send email notifications to every user in the approval flow if a requisition is denied by FLAIR. Currently, only the requester is notified that the requisition has been denied by FLAIR. DEA would like all of their approvers to be made aware of any denied requisitions so the necessary steps can be taken to resolve the issue.

Ticket #81025 – Add functionality for reducing the PO Balance
Multiple agencies have expressed a desire for the ability to reduce the PO Balance. This enhancement is generically worded to allow for discussion on where this functionality would be implemented and how the logic would work.

Q: How is this different than CR 181?
A: CR 181 allows users to update the MFMP encumbrance in FLAIR on a requisition. Ticket 81025 allows users to edit the PO balance.

4.

Q: DOH has a backlog of open requisitions in composing status. It is a cumbersome task to reach out to each individual Requester and request they delete the requisition. DOH would like the ability to delete all historical PRs in composing status.
A: MFMP has logged that enhancement request. Further discussions are required to gain a better understanding of the scope and function of that potential enhancement.

Q: I would like to request the ability to mass edit additional fields, such as the vendor. The system will currently allow multiple vendors to be added to the same PO. My agency has had to cancel and reissue POs in the past when incorrect vendor locations or multiple vendor locations are added. There should be a notification to make the user aware of any inconsistencies. The combination of adding the ability to mass edit the vendor and having a system notification would help to reduce errors.
A: Please review the fields you would like the ability to mass edit and submit that information in an enhancement request. MFMP will log the request and compile it with any similar existing requests.

Q: On unencumbered purchase orders, how many vendors are you limited to?
A: Not sure at this time, MFMP will conduct further research.

Q: There are many vendors who accept p cards but their vendor registration says that they do not. The workaround has been to process the requisition as unencumbered. This causes issues when comparing reports of unencumbered requisitions and p card related requisitions. It would be helpful if MFMP could analyze all vendor registrations to determine which vendors do accept p cards when their registration says they do not. MFMP could then notify those vendors and ask them to update their vendor registration.
A: Bruce Roberts is currently working on a report to show all the vendors that are not registered with the p card option checked. This may be a helpful starting point. When Bruce was at DOH, if a user came across a vendor that accepts p cards even though their registration says they do not, the user would indicate that in the comments section. MFMP does engage vendors on a regular basis to try ensure their registrations are accurate and up to date.

Q: The minority business certification is not always correct. It can create issues with reporting if I am trying to report on minority spend but the vendor's registration does not accurately indicate if they are a minority or woman owned business. It would be helpful if the registration process was cleaner or if the information submitted is validated.
A: Minority certified business entities do go through several layers of approvals and verification to ensure that they meet the certification requirements. Minority certified business entity information comes from the Office of Supplier Diversity.

Q: On a requisition, if I click on a vendor name the system does not tell me if they accept p cards or not. It would be helpful if that information was included.
A: That information is displayed when you search for a vendor. We can look into adding that information to that section.

Ticket #104346 – Enable Standard Reports in the Buyer application

Standard Reports

What are Standard Reports?
- Standard Reports are pre-defined operational reports that agency customers can run to analyze procurement data.

What are the benefits of Standard Reports?
- Standard Reports are available within the Buyer application.
- Agency customers can run Standard Reports at will.
- Agency customers can specify report filters and display options to better focus report results.
- Report results may be displayed in Microsoft Excel, Comma Separated Value (CSV) format, or within the web browser (HTML).

Why use Standard Reports?
- Standard Reports provide a more dynamic tool for accessing operational reports designed to assist agency customers in their daily activities.
- Standard Reports could replace several MFMP Secure Reports.
    - IRs with Last Approver
    - PRs in Submitted Status
    - Auditor IR Report
    - All Open Orders
    - POs without IRs
    - And more…
- Access to Standard Reports can be managed by groups and permissions in the Buyer application.

Q: Will Standard Reports eventually replace Secure Reports?
A: No, Standard Reports will not completely replace Secure Reports. Agencies will still have a need for agency specific reports. MFMP does expect Standard Reports to replace some of the operational reports that users are using on a routine basis.

Please note that Standard Reports is not meant to replace Analysis. Analysis will still be the analytical tool. Users should use Analysis if they are looking for spend patterns, purchases against a specific commodity code, etc. Standard Reports can be used for operational reports that users look at on a routine basis to assist with daily operational activities.

Please note that the following screenshots do not contain any of the State of Florida customizations. These screenshots are from an "out of the box" version of the Ariba application.

Access Standard Reports from the 'Manage' dropdown menu in the Buyer application.

Select a 'Category'. Report categories (or report types) correspond to the business areas within MFMP such as Requisitions, Orders, Invoicing, etc.
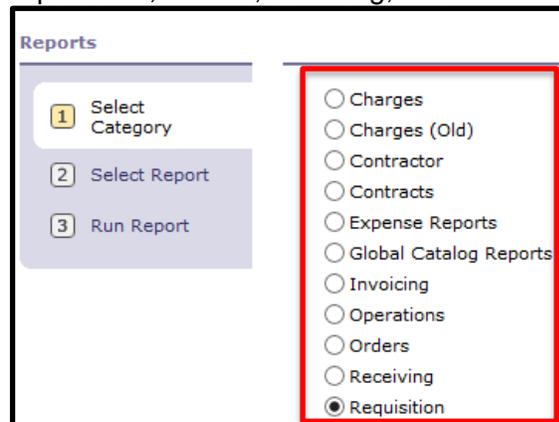
After choosing a report 'Category' the Buyer application will display all available reports within the selected category. Each report will also be displayed with a description.
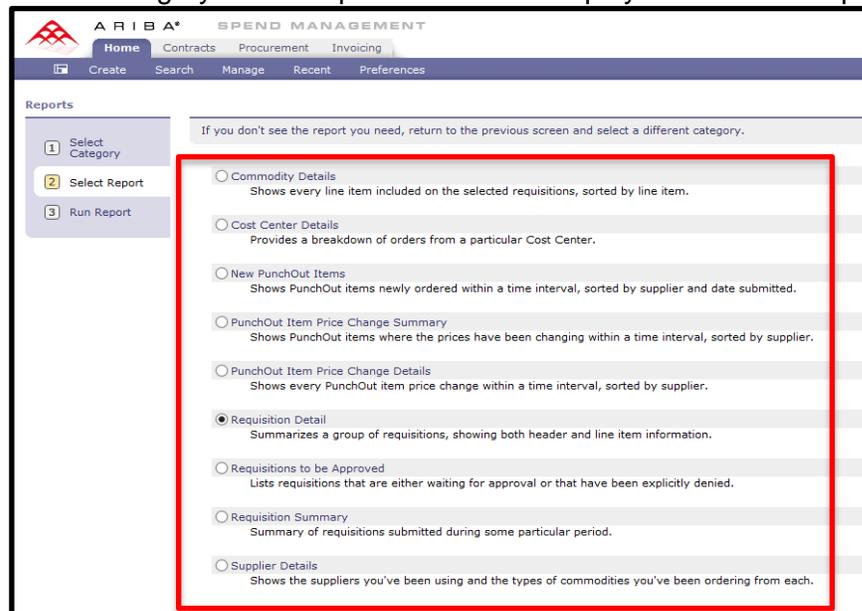
The 'Basic' tab allows customers to add filters to the report to limit the output. Example filters could be PUI, Status, Date Submitted, etc.

Reports

If you don't specify filter values, the report will include all values.

[1] Select Category	
[2] Select Report	
[3] Run Report	

Report Title: Requisition Detail

Report Category: Requisition

Report Format: HTML ▼

Display Chart: ☐ (For HTML only)

Basic | Advanced

Filter Name	Value
On Behalf Of:	(select a value) [select]
Status:	No Choice ▼
Date Submitted:	No Choice ▼

The 'Advanced' tab allows customers to deselect the default display fields. For example, when running the Requisition Detail report, you may not be interested in viewing the title of the requisition.

Report Title: Requisition Detail

Report Category: Requisition

Report Format: HTML ▼

Display Chart: ☐ (For HTML only)

Basic | **Advanced**

Name ↑	Display	Filter	Value
Cost Center:	☑		
Description:	☑		
Item No.:	☑		
On Behalf Of:		☑	(select a value) [select]
PO:	☑		
Qty:	☑		
Requester:	☑		
Requisition No.:	☑		
Requisition Title:	☑		
Requisition Total:	☑		
Status:	☑	☑	No Choice ▼

After specifying report filters and/or display fields, customers can run the selected report. Below is an example of the *Requisition Detail* report displayed via the web browser (HTML).

Considerations for Implementing Standard Reports
- Enable Standard Reports in the Buyer application and remove default reports that are not applicable to MFMP.
- Evaluate Legislative data scoping.
- Limiting reportable data by a specified timeframe.

Decision Points for Implementing Standard Reports
- What report categories (report types) should be implemented with Standard Reports?
- Are there custom categories (report types) that should be added to Standard Reports?
- What filters and/or data fields should be available on each report?
  - Entity/OLO, PUI, Accounting Fields, etc.
- Who should have access to Standard Reports?
- Which MFMP Secure Reports may be deprecated with the implementation of Standard Reports?

Q: Our agency currently uses the description field in the accounting section to record the Contract Manager since there is not a designated field for it and many of our Contract Managers do not have access to MFMP. Could that be one of the data elements that is added so the report can be filtered or sorted?
A: Yes, that could potentially be added to these reports. Further investigation will be necessary to confirm.

Q: Our agency currently uses Secure Reports to track Contract Managers and to ensure that Contract Managers are appropriately certified. Will the implementation of Standard Reports impact our ability to use Secure Reports as a tracking mechanism?
A: That would be part of our review to assess the impact of implementing Standard Reports, but that likely would not be an issue.

	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.
5.	

Action Items					
#	**Action Item Description**	**Assigned To**	**Status**	**Due Date**	**Comments**
1.	Research how many unique vendors can be added to an unencumbered requisition.	MFMP	Complete		There is no limitation to the number of unique vendors that can be added to an unencumbered requisition. Vendors are added by line item to a requisition, therefore, adding additional vendors will increase the number of line items on a requisition. MFMP does not recommend adding a large number of line items/unique vendors to a requisition.