



MFMP Change Review Board Meeting

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

Attendees		
#	Entity	Name
1.	DFS	Gloriann McInnis
2.	DMS	Judson Freeman
3.	DMS MFMP	Betsy Chance
4.	DMS MFMP	Bruce Roberts
5.	DMS MFMP	Tyler Brown
6.	DOEA	Byron Saper
7.	DOH	Bill Zimmerman
8.	DOH	Lynn Robinson
9.	DOT	Jordan Miner
10.	DOT	Joseph David
11.	FDC	Anne Rabon
12.	FDC	Kasey Faulk
13.	FDLE	Beverly Malloy
14.	FDLE	Teresa Welch
15.	FWC	Rachel Bozeman
16.	HSMV	Cricket Lee
17.	MFMP	Delvis Catchman
18.	MFMP	Felicia Thompson
19.	MFMP	Jeremy Kong
20.	MFMP	Michael Jackman
21.	MFMP	Robert Cooper III

Topic #	Agenda Topic Description
1.	CRB Organization
2.	Completed CRs
3.	CRs In Progress
4.	CRs for Consideration
5.	Voting and Results
6.	Wrap Up

Meeting Minutes for Topics

Topic #	Minutes for Topics
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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 DMS reserves the right to remove the agency and fill the vacancy 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.

Discussion on Suggested Enhancements

Byron Saper (DOEA) would like to be able to change the encumbrance value on a multi-year purchase order (PO). DOEA has multi-year leases for equipment like mailing and copy machines. DOEA does not encumber the funds when the initial PO begins, therefore after the first year DOEA is unable to use the same PO. They are required to create another PO. This causes issues because vendors will not always reference the most current PO. Vendors will use the initial PO number and reference the initial PO even after that first year.

Agency customer suggests adding another line item to an existing order instead of creating multiple POs.

Robert Cooper III (MFMP) notes that if you add a new line item, it will attach to the original encumbrance. After a certain time has elapsed, you would be able to encumber with the same number but that solution does not work considering the time frame Byron is referring to.

1.

Completed CRs

The following CR was implemented in MFMP since the last CRB meeting:

CR #	Description	Hours	Implementation Date
291	Add OBO only to the approval flow on Change Orders	120	September 29, 2016 9.30.0 release

CR291 was prioritized during the last voting meeting, held in May 2016.

This CR was originally requested by DEP. In DEP's petroleum program, customers often change the On Behalf Of (OBO) to represent a change in the site manager. Changing the OBO field will normally regenerate the entire approval flow. However, a change in site manager did not warrant having the requisition or change order be re-approved by every member of the approval flow. MFMP has created a permission based exclusion so if a customer with the CO No Workflow permission changes the On Behalf Of (OBO) field, MFMP only generates the new OBO in the approval flow.

2.

Meeting Minutes for Topics

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Please note, in order to activate this functionally, agencies must contact the MFMP Customer Service Desk and the update will be made per a standard Operational Data Request (ODU).

CRs in Progress

The following CRs have been approved for implementation in MFMP:

CR #	Description	Hours	Targeted Implementation
295	Add password validation functionality to the FLAIR Login eForm	500	November 2016
305	Add help text to system search page	< 40	November 2016
306	Check posting automation	N/A	January 2017
307	Transition out of fax services	N/A	January 2017

CR 295 Add password validation functionality to the FLAIR Login eForm

CR 295 was prioritized during the last voting meeting in May 2016. UAT for this CR was completed on November 10, 2016.

CR 305 Add help text to system search page

CR 305 was an enhancement discussed in the FY2016-2017 Q1 Customer Round Table (CRT) meeting. This request comes from DOT and DFS. Previously, the search page in MFMP Buyer was not as user friendly as it could be. Some fields require the user to enter a prefix and some do not. This CR will add narrative to help users understand what format and prefixes to use for various fields.

CR 306 and CR 307 are part of the recent efforts related to the MFMP contract extension. The MFMP contract was extended until June 30, 2017 and renewed for an additional four years. The new contract will end on June 30, 2021. Both of these CRs are free of charge.

CR 306 Check posting automation

This CR will assist in check posting automation. Automating this process will help eliminate redundancies and increase efficiencies.

CR 307 Transition out of fax services

Other entities have already transitioned out of offering fax services and MFMP is following suit. MFMP has identified vendors that will be impacted by this transition and has begun reaching out to those vendors to assist with updating their registration.

3.

Meeting Minutes for Topics	
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	<p><u>Discussion on Suggested Enhancements</u></p> <p>Requisitions Denied by FLAIR</p> <p>DOEA does not have PO officers that write purchase orders. One person writes all the purchase orders for DOEA and then they are routed through the approval flow. Byron Saper would like to have a notification sent when a requisition fails FLAIR due to a password issue. Currently, no one receives a notification. It would be helpful if the notification was sent to the requester or the OBO of that purchase order.</p> <p>Robert Cooper III clarifies that the requester does receive a notification if a requisition is denied FLAIR, but the OBO does not receive a notification. Byron would like the OBO to receive that notification as well. Robert confirms that an enhancement has been logged regarding notifying the OBO user. There is also a logged enhancement proposing that requisitions denied because of a bad password would not have to be routed through the entire approval flow again. Currently, when a requisition fails because of an invalid FLAIR password, it has to be withdrawn and resubmitted.</p> <p>Delegation Notification</p> <p>Byron Saper also suggests that a notification be sent when a user is delegated to. When you delegate to another user, the request is routed to their supervisor but that person does not receive a notification that they've been delegated to.</p> <p>Agency customer indicates that the user should know when they log onto the system. However, Byron clarifies that their users at DOEA do not log on often and an email notification would be helpful.</p> <p>Kasey Faulk (FDC) does not believe that having the supervisor approve the delegation provides benefit and would only delay the implementation of the delegation. She has not encountered a situation where a delegation is not appropriate and has to be denied. Therefore, she believes that delegating should immediately go into effect without requiring the approval of the supervisor.</p> <p>Robert Cooper III requests that the existing CR be amended to include Kasey's addition.</p> <p>Attachment/Comment Removal</p> <p>Byron Saper suggests that certain users (like purchasing directors or bureau chiefs) be given the ability to remove attachments and/or comments without requiring approval from the approval flow. Currently, the only person able to remove comments or attachments is the user that added them. This can cause delays if this user is out of the office or unavailable to take action.</p> <p>Rachel Bozeman (FWC) also experiences delays when users attach the wrong attachments.</p>

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	<p>Robert Cooper III confirms that CR has been logged for this recommendation. This potential enhancement requires further analysis to determine how the functionality would work. This type of permission can cause issues.</p> <p>Byron suggests that the permission be limited to a user in leadership or management to restrict the number of users and type of user that would have the ability to make those types of changes. It would be similar to how there is a specific approver for a commodity code.</p> <p>Bruce Roberts (DMS MFMP) clarifies that you do not have to send the requisition back through the whole approval process to remove an attachment or comment. Simply ask the user to delete that attachment/comment and it will not trigger the approval flow.</p> <p>Byron Saper has experienced situations where he needs to act as the preparer of a purchase order and that sometimes requires him to make edits. Kasey Faulk indicates that trying to edit the requisition is what triggers the approval flow, not removing the comment or attachment. MFMP confirms Kasey's clarification. This is how the system is intended to function.</p> <p>View Quantity Balance on a Line Item</p> <p>Agency customer requests the ability to see the remaining balance of a quantity on a line item. Managing line items is difficult when you cannot easily determine the remaining quantity. If the line item quantity is reduced to zero, then the user is unable to create a change order. This happens normally with services when we are trying to determine the number of hours remaining.</p> <p>The customer could see this information on the IR on the <i>Order</i> tab, which should show the quantity that has been invoiced. The customer can also use Analysis and run a report to view the PO Balance.</p>

CRs for Consideration

Based on customer feedback, the MFMP team completed a rough order of magnitude (ROM) for service hours on the following CRs:

CR #	Description	Hours
301	Add a 'Watcher' by contract number to a requisition approval flow	180
302	Add a contract manager role to the IR approval flow for service related invoices	180
303	Implement Standard Reports	200
304	Requisitions in Composing status clean up	128

CR 301 – Add a 'Watcher' by contract number to a requisition approval flow

Business Case

- The Agency for State Technology (AST) has a requirement that specifies that AST must review purchases made from specific information technology contracts. However, there is currently no approval rule in the MFMP Buyer application that will add a 'Watcher' to a requisition approval flow by contract number.
- To ensure the AST requirement is satisfied, AST requested an enhancement to add a 'Watcher' to a requisition approval flow by State Term Contract (STC) or Alternate Contract Source (ACS) number.

MFMP Impact

- This enhancement will add a 'Watcher' by role to a requisition approval flow based on the 'State Contract ID' selected on the line item(s) of a requisition.
- Similar to the current Statewide approver rule, this enhancement will add the 'Watcher' node to all agency requisitions across Purchasing Unit Identifiers (PUI).
- Because the 'Watcher' is added in parallel to the approval flow, it will not hold up procurement.

Q: This enhancement is configured to only allow AST to watch their requisitions?

A: Yes, it would allow them to watch but not actively approve. MFMP will configure the enhancement to allow for the option to change it to an approver if that is desired.

Q: Could AST use a report instead to accomplish the same task?

A: Yes, that would be possible and recommended by MFMP. However, AST specifically requested this enhancement.

CR 302 – Add a contract manager role to the IR approval flow for service related invoices

Business Case

- Per a requirement from the Department of Financial Services (DFS), agency contract managers must certify all service payments made in MFMP. Currently, the requester of a requisition, the OBO of a requisition, or the requester of a MFMP contract is added as the first approver on a service related IR. The contract managers at the Department of Veteran Affairs (DVA); however, do not create requisitions or MFMP contracts.
- To satisfy the DFS requirements for certifying services, the DVA requested an enhancement that will add a “Contract Manger” role into the approval flow of a service related IR.
- This ‘Contract Manager’ would be added as the second approver in the IR approval flow, after the requester.

MFMP Impact

- This enhancement will add a new role to the approval flow of service related IRs only. The new role will be added after this existing ‘Requester/OBO’ node and before the ‘Exception Handler’ node.
- Agency customers will have the ability to opt into this new IR approval rule, if desired.

Michael Jackman notes that all business rules, like this enhancement, are optional so agencies may choose whether or not they want to leverage the enhancement.

Q: Does this impact or replace the Summary form that must be completed for DFS?

A: No, this does not replace any of the requirements from DFS. This would provide a mechanism for meeting DFS requirements.

Q: Is this by PUI or by agency? How does this impact agencies with different PUIs?

A: It can either be one ‘Contract Manager’ role per PUI or one ‘Contract manager’ across an entire agency.

Q: Can the Contract Manager be manually added to the approval flow?

A: Yes, the Contract Manager can be added manually. However, that would have to be added as part of the agency’s existing business process. This enhancement would eliminate the need to do that manually.

CR 303 – Implement Standard Reports

What are Standard Reports?

- Standard Reports are pre-defined operational reports that agency customers can run to analyze data.
- Please note, Standard Reports are not meant to replace Analysis. If you are looking for spend patterns or more in depth analytics, please use Analysis.

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.
 - Determining what fields would be available will be part of the design phase if this CR is prioritized. The design team will discuss what the default fields will be and what fields customers will have the ability to add and remove.
- 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
 - All Open Orders
 - POs without IRs
 - And more...

What reports will be available with the implementation of Standard Reports?

- 9 reports are targeted for the implementation of Standard Reports. Additional reports may be implemented in subsequent change requests. The reporting categories, titles, and descriptions to be implemented as part of CR 303 are provided below.
- In the future, additional reports can be added. MFMP will estimate the work required for each of additional report separately and each additional report will be its own CR.

Invoicing

- *Invoice Reconciliation Details* – Detailed summary of all invoice reconciliations grouped by supplier, order, and contract.
- *Purchase Order Liability* – Detailed summary of all purchase orders that have not been fully invoiced.
- *IRs with Last Approver* – Detailed summary of all invoice reconciliations pending reconciliation or approval.

Purchase Order

- *Purchase Order Details* – Detailed summary of all purchase orders grouped by supplier and commodity code.

Requisitions

- *Requisition Details* – Detailed summary of all requisitions.
- *Requisitions to be Approved* – Detailed summary of all requisitions awaiting approval or that have been explicitly denied.

Receiving

- *Items Not Yet Received* – Detailed summary of line items from purchase orders that have not yet been received.
- *Items Received* – Detailed summary of lines items from purchase orders that have been received.

Q: For the *Items Received* report, will that show if the items will be invoiced or paid out?

A: It can be configured to do so. MFMP currently does not see this speaking to the invoicing side of things. This can be discussed further during the design phase. MFMP is unsure of how helpful it would be to include that type of information.

Agency customer notes that it would be beneficial to see that information near year end to make sure that everything is paid out.

Operations

- *User and Groups* – Detailed summary of all active user profiles and their associated groups and roles.

Q: I use the Users & Groups report often. Currently, the value in the Management Level column is a code. I understand what the code means by looking at a reference table. However, many of the users that I distribute the report to are not aware of what those codes mean. To assist with this, I build another column to show what the dollar value associated with the code is. It would be helpful to include this column by default for each of those management levels.

A: MFMP will take that into consideration. Please remember that MFMP is not simply taking the contents of the existing Users & Groups report and copying it over to the Standard Report. The Standard Report will be more configurable based on your needs.

Q: Are Standard Reports going to be in real time?

A: Standard Reports will not be in real time. The data from the previous day will be loaded into a summary table. The Standard Reports will use this summary table to populate the report. As part of the design phase, MFMP will determine how far back in time Standard Reports will go.

Q: Are Standard Reports canned like the Secure Reports are? Or do we create our own reports?

A: The reports will be canned as far as the fields available for the report. But you will have a level of customization that you do not have with Secure Reports. For example, being able to filter by PUI or specify a time frame.

Q: Where will Standard Reports be located?

A: In MFMP Buyer. It will be part of the dashboard.

Q: Who will receive access to Standard Reports?

A: MFMP will create a new permission to allow agencies to determine who gets access.

Q: Will we only be able to select one PUI or will we be able to select multiple PUI?

A: MFMP will configure Standard Reports to allow users to select multiple PUIs.

Q: Is there anything in place to prevent a user from selecting all PUIs and impacting the overall performance of the system?

A: Because these reports will be referencing a summary table, the impact on the overall system will be limited if a user runs a “bad” report.

Q: How far back will the data go?

A: This will be decided during the design phase. How far back the data goes does not impact MFMP’s estimate for this enhancement. It does impact the performance risk of those reports. MFMP will advocate limiting how far back the data goes because these are primarily meant to be operational reports.

Q: Will Secure Reports ever go away? I see overlap between Standard Reports and Secure Reports?

A: Standard Reports is not meant to replace Secure Reports. There will still be a need for Secure Reports. For example, if one agency requires a special, customized report. That report would not be a good candidate to become a Standard Report since only one agency leverages it. MFMP does expect individual Secure Reports to be replaced by Standard Reports, but Secure Reports as a whole will not go away.

Q: What is the process for making changes to Standard Reports? Will that be a separate change request?

A: Yes, it will not be considered a report request. It will be a change request and each update will be estimated separately.

Q: DFS has multi-year encumbered POs, will DFS be able to leverage these reports to capture all of those? For example, if the PO is created in FY2014-2015 but payments are still being made in FY2016-2017. Right now, we have to combine multiple reports to capture that information.

A: Payment information will be available in the invoicing standard reports but MFMP will have to research that further.

CR 304 – Requisitions in Composing status clean up

Business Case

- The Department of Health (DOH) identified a large number of historical requisitions in ‘Composing’ status as part of an internal audit process. DOH currently has a business process to delete requisitions in ‘Composing’ status from the profiles of requesters who transition to different responsibilities or leave their agency. However, due to the volume of historical DOH requisitions in ‘Composing’ status (~17,000), DOH is unable to follow their business process to delete the applicable requisitions.
- To support an effort to “clean up” requisitions in the MFMP Buyer application, DOH requested an enhancement to implement a process that will delete historical requisitions in ‘Composing’ status.

MFMP Impact

- A new task will be created in MFMP that will delete all requisitions across Purchasing Unit Identifiers (PUI) in 'Composing' status that meet a specified date criteria. This task will be run on a regular interval after the initial implementation.
- The date criteria will be discussed in the design phase.
- Please note that this task will help visually clean up the system but does not impact system performance.

Q: Would agencies have to agree on the date criteria or would each agency be able to specify their own set of criteria?

A: The date criteria would be enterprise wide. MFMP recommends that the first time be from 2003 up until 6 months ago to clean up the bulk of the requisitions. Then each subsequent task would run every quarter and look for requisitions in 'Composing' status that are older than 6 months.

Q: Could you configure this functionality to also remove denied purchase orders?

A: Denied purchase orders are different because they were denied for a reason. For historical reasons, MFMP does not want to delete those items from the system. MFMP can look into that issue but it would be a different process and a different enhancement.

Q: Instead of making the task look for requisitions by date, can you base it off the inactive flag on user profiles?

A: That could be done but it would not capture everything like the date range would. Not all agencies adhere the process of inactivating users. MFMP feels confident that the date range is the best method.

Please note that this task would delete these requisitions from the system. MFMP often means inactivate when the term "delete" is used. This is different. This task will make the impacted requisitions unavailable in the system.

Voting

Please use the voting sheet provided to your agency and review the list of changes provided. If you feel there is an enhancement that should be in the Top 4 that we did not include, please use the blank as a "write-in" change request.

We encourage agency representatives to get together and discuss the changes that would most benefit all users of MFMP.

Reminder: Each agency only gets one official voting sheet.

When you have finished voting, please bring your voting slip to the front of the room and we will tally the results.

5.

Voting Results

Ranking	CR #	CR Title	# of Votes
1	CR 303	Implement Standard Reports	28
2	CR 304	Requisitions in composing status clean up	22
3	CR 302	Add a contract manager role to the IR approval flow for service related invoices	16
4	CR 301	Add a 'Watcher' by contract number to a requisition approval flow	11
5	Ticket 55708	Request to encumber contracts	4
6	CR 281	Add the ability to hide/show line item details on an Invoice Reconciliation	3

Thank you for voting, we will move forward with a design for the change request ranked #1.

Q: How many CRs will be implemented?

A: MFMP will present the top two CRs to DMS executive leadership for consideration. Please remember that prioritizing CRs is based off the hour value. As part of the new MFMP contract, there are 1000 hours less than the previous 2000-hour yearly allotment.

Wrap Up

- As a reminder, MFMP posts each Change Request Presentation 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.

6.

Action Items					
#	Action Item Description	Assigned To	Status	Due Date	Comments
1.	Amend ticket 102765 to include recommendation that the delegation should not require a supervisor's approval	MFMP	In Progress		
2.	Present CR 303 and CR 304 to DMS executive leadership	MFMP	In Progress		