



MyFloridaMarketPlace (MFMP) Customer Round Table (CRT) Meeting

Meeting Information	
Meeting Title:	MFMP Customer Round Table Meeting
Occurrence:	Aug. 7, 2018
Time:	9:00 a.m.
Location:	Department of Management Services (DMS), Room 101, 4050 Esplanade Way, Tallahassee, FL 32311

Attendees		
#	Entity	Name
1.	AHCA	Ja Alexander (via phone)
2.	APD	Beth Sparkman (via phone)
3.	APD	Joni Laramore (via phone)
4.	DBPR	Betty Dennis
5.	DCF	Araceli Sema
6.	DCF	Rob Dorman
7.	DEP	Candace President (via phone)
8.	DEP	Gloriann McInnis
9.	DEP	Loree Wynn (via phone)
10.	DFS	Rebecca Hale
11.	DFS	Sharon Bussey (via phone)
12.	DHSMV	Cricket Lee
13.	DMS	Angela Pereira
14.	DMS	Lance Dyal
15.	DMS	Shaun Whitfield
16.	DMS MFMP	Betsy Chance
17.	DMS MFMP	Bruce Roberts
18.	DMS MFMP	Jillian Green
19.	DMS MFMP	Tyler Brown
20.	DOH	Bill Zimmerman
21.	DOR	Terry Paul
22.	DOT	Jenee Floyd (via phone)
23.	DOT	Joseph Davis (via phone)
24.	FDC	Anne Rabon
25.	FDC	Kris Burnside
26.	FDC	Lacy Perkins
27.	FDC	Sharita Newman
28.	FDLE	Beverly Malloy (via phone)
29.	FDLE	Justin Payne
30.	FDOC	Dianne Screws (via phone)
31.	FDVA	Robert Chauncey (via phone)
32.	FDVA	Scott Gerke (via phone)
33.	FDVA	Shelley Wittaniemi (via phone)
34.	FWC	Alisha Morgan
35.	FWC	Jackie McNealy
36.	LOT	Tanya Maphis (via phone)
37.	MFMP	Crystal Owens

38.	MFMP	Felicia Thompson
39.	MFMP	Jeremy Kong
40.	MFMP	Joseph Chabot
41.	MFMP	Michael Jackman
42.	MFMP	Robert Cooper III
43.	OAG	Ashley Walker (via phone)
44.	OAG	Tina Vaughan (via phone)

Agenda	
Topic #	Agenda Topic Description
1.	Recent Updates
2.	Cycle Times
3.	Emergency Purchases
4.	Open Forum

Meeting Minutes for Topics									
Topic #	Minutes for Topics								
1.	<p>Recent Updates Fiscal Year-End Recap</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="text-align: right; background-color: #4a7ebb; color: white; padding: 5px; border-radius: 5px;">MFMP Processed</div> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid #4a7ebb;">Transactions</th> <th style="text-align: right; border-bottom: 1px solid #4a7ebb;">Total Processed</th> </tr> </thead> <tbody> <tr> <td>Carry Forward Records</td> <td style="text-align: right;">58,954</td> </tr> <tr> <td>Encumbered Orders</td> <td style="text-align: right;">14,095</td> </tr> <tr> <td>Unencumbered Orders</td> <td style="text-align: right;">2,518</td> </tr> </tbody> </table> </div> <p>Upcoming MFMP Surveys</p> <ul style="list-style-type: none"> • MFMP Annual Customer Surveys will be distributed on Sept. 10, 2018 <ul style="list-style-type: none"> ○ The Purchasing Survey will be sent to purchasing liaisons, agency customers that have submitted 10 or more requisitions during fiscal year 2017-18, and system administrators. ○ The Finance and Accounting (F&A) Survey will be sent to F&A liaisons and agency customers that have submitted 10 or more invoices during fiscal year 2017-18. • MFMP New Customer Survey will be distributed on Oct. 29, 2018 <ul style="list-style-type: none"> ○ The New Customer Survey will be sent to agency customers that have submitted more than five requisitions or invoices but less than 10 requisitions or invoices and have been added to MFMP in fiscal year 2017-18. 	Transactions	Total Processed	Carry Forward Records	58,954	Encumbered Orders	14,095	Unencumbered Orders	2,518
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The Annual Customer Satisfaction survey is a great opportunity for the MFMP team to receive feedback directly from agency customers. The MFMP team encourages agency customers to complete the survey.

Utilization Scorecard

- The fourth quarter scorecard is posted on the [MFMP website](#).
- Metrics 1 – 4 have meet the state’s utilization goal.
- Metric 5 is below the goal of 50 percent.

Poll: What can we do to assist your agency in eQuote utilization?

- Have Bruce Roberts come out to our agency and give training.
- Incentivize vendors to respond.
- Create more opportunities to use eQuotes with contracts.
- How can we get vendors to respond to eQuotes? When I created an eQuote, no vendors responded. I am not sure if the email address on file was outdated.
- We don’t really use eQuotes except for IT related purchases.
- Vendor outreach and additional vendor relations.

Agencies interested in receiving utilization support should contact the DMS MFMP team or the MFMP Customer Service Desk (CSD). Recently, the MFMP team worked with the Agency for Persons with Disabilities (APD) on updating their approval workflows. Later this month, MFMP will work with APD to consolidate their purchasing unit identifiers (PUIs). Please refer to the [Utilization Support page](#) for more information.

Auto-Add Vendors

- As of **June 27, 2018**, all eQuotes created from the Management Consulting Services contract ([973-000-14-01](#)) will have all 11 contracted vendors automatically added to the eQuote.
- This is the same functionality that is enabled on the IT Staff Augmentation contract.
- Please note that the contract number must be added to the sourcing event for the auto-add functionality to be triggered.

[MFMP website](#) Updates

- The MFMP team is working on consolidating pages and updating website content.
- Archived content will no longer be available on the MFMP website. Agency customers will need to contact the CSD to obtain archived information.

Poll: What reporting applications do you/your agency use (select all that apply)?

- MFMP Buyer (38 percent)
- Secure Reports (42 percent)
- MFMP Analysis (21 percent)

There are situations where agency customers will need to use both Secure Reports and MFMP Analysis to obtain the desired information. Agency customers are encouraged to leverage both resources.

Requesting New Reports

- [Report Request Form](#).
- Please remember that report requests follow a contractually defined timeline. MFMP is able to accommodate ad-hoc or urgent requests, but agency customers should take the timeline into consideration when making report requests.

A CRT attendee expressed interest in receiving MFMP Analysis training tailored to their PUI. The MFMP team encouraged this agency customer to contact the DMS MFMP team or the CSD and formally request an agency specific ad-hoc training.

A CRT attendee asked how to create a report so it is available to other agency customers at their agency. To save a report so that it is publicly available, instead of selecting *Personal Workspace*, customers should select *Public Reports*, and then select the folder for their agency. Once saved to this folder, this report will be available to all customers in their agency.

A CRT attendee asked how often the 'User' and the 'Users and Groups' reports are updated. The 'User' report is updated weekly on Monday. The 'Users and Groups' report is updated daily.

Please remember to filter by agency or PUI when pulling a report from Analysis. Otherwise, the report will return data from all State of Florida agencies.

Vendor Bid System (VBS) User Cleanup

- The MFMP team identified 140 user accounts with passwords that expired over two years ago.
- Communications were distributed to agency VBS administrators on **July 16, 2018**.
- Please contact Tyler Brown for assistance with VBS user cleanup.

MFMP Security Policies

- Due **Aug. 31, 2018**.
- MFMP security policies outline an agency's processes for monitoring confidential information.
- A sample policy can be found in Appendix C of the [System Administrator manual](#).

Upcoming Statewide Training:

- Orlando: Oct. 15 – 16, 2018.
- Tampa: Oct. 17 – 18, 2018.
- Ft. Lauderdale: February 2019.

Registrations are open for the Orlando and Tampa trainings. Registrations for the third and fourth quarters and quarter four trainings will be posted during Q2. Please encourage your agency customers to register and attend training.

Poll: What other areas of the state would your agencies like us to offer in-person training?

- Key West.
- Key West.
- Any thoughts to overlaying DMS MFMP training with the agency's MFMP/policy use training, kind of a joint training?
 - The MFMP team conducted a joint or combined training with the Department of Transportation. Please contact the MFMP team if your agency is interested in a joint training.

2.

Cycle Times

Cycle time is the total elapsed time, from submission to final approval, of a transaction.

How are cycle times useful?

- Potential Key Performance Identifier (KPI).
- Monitor agency's performance and/or employees' performance.
- Identify any bottlenecks and how they may improve.
- Identify if approval flow changes need to be made.

What if issues are identified? The MFMP team can:

- Recommend approval flow updates; and
- Develop customized MFMP Analysis reports.

Customers can access average cycle time information by leveraging the following [MFMP Secure Reports](#):

- 'Invoice Payment' and the 'Req to PO' cycle time reports.

Agencies can identify potential bottlenecks in approval flows in [MFMP Analysis](#).

See the [Cycle Time Job Aid](#) for information on how to calculate cycle times.

The cycle time reports in MFMP Analysis are intended to assist with agency workload management. The cycle time reports in Secure Reports provide a big picture perspective.

Contact the MFMP team for cycle time agency support.

A CRT attendee experienced an issue where they were added to an approval flow by name. When the requisition reached them and required their approval, the requisition did not appear in their to do portlet. However, the customer could locate and approve the requisition by searching the purchase requisition (PR) number. The only way the customer was notified of the PR was through an internal email referencing the delay in approval. As there are a few different scenarios for this situation, the MFMP team encourages the customer to contact the CSD when these issues arise so the MFMP team can investigate further.

A CRT attendee experienced an issue with a delay between when a purchase is approved by FLAIR and when a purchase order number is generated. This agency customer has seen it take up to a day and a half to generate a purchase order number. The MFMP team encourages the customer to notify the CSD when this happens so it can be tracked and investigated. There are various operational checks and processes that the MFMP team conducts to proactively identify issues. The identified order may have appeared in that process, which would have taken the MFMP team a little extra time to process. Depending on the timing, the types of issues caught in this operational process are normally resolved the next morning.

3.

Emergency Purchases

When preparing for an emergency, review:

- Your agency's emergency purchasing policy;
- The Office of the Governor's Executive Order, if applicable; and
- Florida Statutes and Florida Administrative Code Rules.

When purchasing during an emergency:

The image contains five vertical blue banners with white and yellow icons and text. From left to right:

- Banner 1:** Icon of a document. Text: "Submit **PUR 7800**, Notice of Emergency Purchase for agency-declared emergencies; see Rule 60A-1.045, F.A.C."
- Banner 2:** Icon of a magnifying glass over a minus sign. Text: "Reduce approval flows by using requesters who have a **spend authority** larger than the order total. See the MFMP Buyer Manual for more information."
- Banner 3:** Icon of a gavel. Text: "Select the emergency purchase **Method of Procurement** (O, O1, O2). See the MFMP Buyer Manual for more information."
- Banner 4:** Icon of a dollar sign in a yellow circle. Text: "Exempt the **transaction fee** (reason code 5A or 5B); see Rule 60A-1.031, F.A.C."
- Banner 5:** Icon of an orange PCard. Text: "Call the vendor to provide your **PCard number** and check the **PCard** box on the requisition. See the MFMP Buyer Manual for more information."

Purchasing options:

The image contains three blue circular icons with white text and checkmarks, numbered 1, 2, and 3. Below them are three footnotes.

- 1 Create unencumbered orders when*:**
 - ✓ Vendor's W-9 is **not** verified with DFS
 - ✓ FLAIR is unavailable**
- 2 Create PCard orders when***:**
 - ✓ Expedited purchases are necessary
 - ✓ MFMP is unavailable
- 3 Create encumbered orders when*:**
 - ✓ Vendor has a valid W-9 on file with DFS
 - ✓ FLAIR is available**

* Follow your agency's encumbrance policies.
 ** FLAIR is available Monday - Saturday, 7 a.m. - 7 p.m., but may be unavailable during a state of emergency.
 *** Follow your agency's PCard policies.

For reference and assistance:

- Contact the [MFMP team](#) for recommendations; and
- Contact the [Division of Emergency Management](#) with questions.

Florida Emergency Supplier Network

The [Florida Emergency Supplier Network](#) (FESN) provides a list of vendors that have agreed to provide goods and services during an emergency.

- There are approximately 575 registered suppliers.

Focuses on goods and services with increased need, such as:

- Debris removal;
- Food and drink catering;
- Generators; and
- Batteries and flashlights.

The supplier list can be found on the [FESN website](#).

The supplier list has a two-year term. The current list will expire at the end of this calendar year and a new list will be posted in January 2019.

If your agency is aware of a vendor that provides goods or services similar to those listed above, please encourage them to sign up for the FESN supplier list. Please note that the vendor must also be registered in MFMP and have completed the W-9 process to process an encumbered purchase order.

4.

Open Forum

These meetings are intended to:

- Discuss issues and concerns from agencies;
- Identify and review improvements to MFMP applications, training and/or communications; and
- Allow agencies to discuss internal process/policies with each other.

After each meeting, the MFMP team will:

- Review feedback and determine next steps (e.g., create change request, find existing change request number, provide training material, follow-up for additional context, etc.); and
- Contact the originator to discuss the status of their feedback.

A CRT attendee wanted to know if MFMP notified all agencies when a new report is added to the Secure Reports site or if they only notify the agency customer that requested the report. Normally, those new reports are specific for the agency so MFMP only notifies the requesting agency. However, the Secure Reports job aid is updated annually and contains information on all of the available reports. The MFMP team will review the current process and determine the best way to notify agencies of new or updated reports, as applicable.

Michael Jackman, the applications and infrastructure manager at MFMP, reminded CRT attendees that the MFMP team approaches each report request by trying to understand the problem or issue that triggered the request. This approach allows the MFMP team to better understand how to resolve the issue instead of simply creating report after report.

Poll: What questions do you have for the MFMP team?

- Is there a way to run a report to see how long ago inactive agency customers were changed to inactive?
 - There is not a report that contains the date when an agency customer was inactivated; however, the 'Users and Groups' report contains each agency customer's last login date, which may be helpful.
- Is there a way for Secure Reports to display the last updated date?
 - This information is currently available in Secure Reports. To the right of the report, it will display the last time the report was run. To see the update frequency of each report, please refer to the [Secure Reports job aid](#).
- Can an email be sent when the Buyer Manual is updated?
 - There is a Rich Site Summary (RSS) feed available on the Manuals and Job Aids page. If an agency customer subscribes to this feed, they will be notified via email each time the page is updated. In addition, each job aid and manual contains a last updated date within the document itself.
- When should inactive agency customers be removed from the system, if at all?
 - System administrators should regularly review their agency's customers and should have an internal process for determining when they should be inactivated or removed. The MFMP team is currently developing a plan to cleanup customers who haven't logged into MFMP over the past five years.
- Is there a way for MFMP/DMS to automatically delete all composing requisitions created by inactive agency customers?
 - Not at this time.

The MFMP team is actively working with the Department of Financial Services on object code to commodity code mapping updates.

A CRT attendee asked who the point of contact should be when commodity code to object code mapping issues are identified. The MFMP team recommends that the agency customer reach out to the MFMP CSD and to the pertinent contract manager. The MFMP team will work with the contract manager to resolve the issue.

A CRT attendee asked if MFMP could see the commodity codes that a vendor has selected, and if so, if MFMP could proactively identify issues and resolve them. For a line item catalog, MFMP would be able to determine the mapping ahead of time. However, for a punchout catalog, MFMP would not know what the mapping is until an agency customer attempts to punch back into the system from the vendor's catalog. MFMP does not proactively audit vendors' punchout catalog item commodity codes. MFMP has begun analyzing the mapping to find where the object code has been changed from the default object code, which likely indicates an incorrectly mapped code.

	If you have further questions please contact the MFMP team at MyFloridaMarketPlace@dms.myflorida.com
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Action Items					
#	Action Item Description	Assigned To	Status	Due Date	Comments
1.	Research instances where an agency customer was unable to view a PR in their 'To Do' queue.	MFMP	In Progress		
2.	Develop a potential process to communicate about applicable new or updated secure reports.	MFMP	In Progress		