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MyFloridaMarketPlace (MFMP) Agency Administrator Responsibilities

The Department of Management Services (DMS) delegated MFMP System Administration responsibility to individual agencies, and each agency specifies individual users.

- Submit your agency’s annual confidential information policy
- Work with Purchasing and Finance and Accounting liaisons on MFMP initiatives
- Actively participate in MFMP sponsored meetings and events

System Administrators:
- Assist with monitoring confidential data
- Ensure proper training for individuals with access
- Create new MFMP accounts, including the agency’s MFMP FLAIR encumbrance account
- Assign only necessary groups/roles for each customer
- Monitor, update and inactivate customer accounts
- Reset account passwords
- Establish and maintain agency Ship To and Bill To addresses
- Maintain agency requisitions and invoice approval flows
- Assist with maintenance of MFMP agency distribution lists
- Distribute MFMP communications to all agency customers

**Tip:** Identify at least one backup System Administrator for your agency to ensure coverage when the primary System Administrator is out of office. Because this is a critical role, allow only a few staff members this level of access.

Purchasing and Finance and Accounting Liaisons Responsibilities
- Represent your agency’s point of view in MFMP meetings
- Champion MFMP
- Fully understand MFMP functionality
Monitoring Confidential Data

You must exclude confidential information from MFMP. This includes information in the comments field, line item description, as well as attachments. Including such information in MFMP may violate Chapter 119.071 F.S., as well as comparable federal regulations relating to confidentiality such as the Health Insurance Portability and Accountability Act (HIPAA).

Annually submit your agency Confidential Information policy to MFMP (MyFloridaMarketPlace@dms.MyFlorida.com) by August 31, stating your agency will not input confidential information in MFMP. This policy should include steps the agency uses to monitor for confidential information. Appendix 3 includes a sample policy.

Direct agency-specific questions about confidential information to your agency MFMP security officer or General Counsel Office.

Examples of confidential information include, but are not limited to, the following items:

- Client/Patient names
- All elements of dates (except year) directly related to an individual, including birth date, admission date, discharge date and date of death
- Telephone numbers
- Email addresses
- Social Security numbers
- Medical record numbers
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- All geographic subdivisions smaller than a state, including street addresses, city, county and zip codes

MFMP secure reports assist your agency in reviewing transactions that might contain confidential data:

1. Invoice Attachments by Commodity Code – This report lists invoice reconciliations with an attachment linked to the invoice reconciliation in the following statuses: Approved, Approving, Paid, Paying, Reconciling and Rejected for pre-defined commodity codes (Clinics, Doctors, Detention transportation, Drugs, misc., Guard, Law enforcement and security, Hospitals, Language interpretation, Notaries, Training, and Uniforms).

2. Invoice eForm Attachments by Commodity Code – This report lists invoice reconciliations with an attachment linked to the Invoice eForm for in the following statuses: Approved, Approving, Paid, Paying, Reconciling and Rejected pre-defined commodity codes (Clinics, Doctors, Detention transportation, Drugs, misc., Guard, Law enforcement and security, Hospitals, Language interpretation, Notaries, Training, and Uniforms).

3. PR Audit by Commodity Code – This report lists requisitions in the following statuses: Composing, Submitted, Approved, Denied, Ordering, Ordered, Receiving, Received, Canceling and Canceled that contain pre-defined selected commodity codes (Clinics, Doctors, Detention transportation, Drugs, misc., Guard, Law enforcement and security, Hospitals, Language interpretation, Notaries, Training, and Uniforms).

Removing Confidential Information

The customer who originally attaches a document into MFMP can delete attachments and/or edit or delete comments.

- If a requester attaches confidential information to a requisition and someone detects it during the approval flow, the requester or customer who originally attached the document can delete the attachment and attach a new document without the requisition approval starting over.
- Once the transaction has fully processed, anyone within the approval flow is able to add or remove a comment or attachment.

The History tab provides an audit trail for edits and deletion of comments and attachments for orders, invoices and invoice reconciliations.

Step by Step

- Locate the attachment or comment that you need to remove on the Summary tab
- Click on the Delete link for comments or the Delete Button for attachments.

Step by Step

For more information about confidential information, please consult your agency’s confidential information policy.

Training

While MFMP provides a variety of training opportunities for MFMP customers, use these trainings to supplement your agency’s training program. When assigning groups/roles to an agency customer, the System Administrator is responsible to ensure the customer receives the proper training.

DMS offers several tools, available on the MFMP buyer toolkit, to assist in developing your agency’s training program:

- **Training presentations**: DMS posts its MFMP training course materials online; we encourage agencies to use these materials when developing agency-specific training courses.
- **OnDemand Tool**: Interactive self-paced Web-based online tool.
- **MFMP Training Environment**: A ‘sandbox’ or play environment that simulates the MFMP production environment. It does not deliver purchase orders to vendors, encumber funds or post payments in FLAIR.
- **Job Aids**: Tools and manuals to provide guidance on using MFMP.
- **MFMP eNewsletter**: Bimonthly newsletter for buyers and vendors.

For assistance in developing your agency’s training program, please contact the DMS MFMP team at MyFloridaMarketPlace@dms.MyFlorida.com.

DMS also offers several training options, including interactive, training using WebEx software, training tours, and in-person training, in Tallahassee and throughout the state when possible.

- **Interactive Webinar Training Sessions** offer all customers hour-long interactive training from their computers and phones on MFMP functions. Participants must register online.
- **Seminars and Workshops** provide face-to-face training. Workshops include hands on work in MFMP.
- **Exclusive MFMP Training “Tours”** are recorded training sessions of various MFMP functions. Pick a tour line and we guide you through one of our training presentations, with added audio and punchout to the MFMP system to simulate typical everyday tasks.

Training Recommendations

DMS recommends customers in each role attend the following classes:

<table>
<thead>
<tr>
<th></th>
<th>System Admin</th>
<th>Requester</th>
<th>Supervisor</th>
<th>Purchasing</th>
<th>Invoicing</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Overview</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>System Administrator</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reporting</td>
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<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Creating a Requisition</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Approving Requisitions</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understanding the</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Transaction Fee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reconciling / Approving</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receiving</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>eQuote</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

MFMP Training Environment (Sandbox)

DMS established the training environment to help customers gain “hands-on” exposure to the system. The training environment is a safe environment where customers can create, approve and receive “test” transactions in the system. In the training environment, you do not actually send your completed transactions to FLAIR for approval. The training environment contains production transactional data; however, it is only updated monthly. If you see items in Submitted status that have already been sent to the vendor, remember this data is a snapshot of the data as of the last monthly refresh.

Any new customer accounts added by the agency’s System Administrator after the last monthly refresh will not be in the training environment but a System Administrator can add them.


Creating Transactions in the Sandbox

When creating requisitions and reconciling invoice reconciliations within the training sandbox, it is important to keep the following key points in mind:

1. Nothing created and/or altered in the training environment has any effect on work within the production environment.
2. The username in the training environment is the same as a customer’s user name in production.
3. The default password for all customers in the training sandbox is train30.
4. You are unable to view attachments in the training environment.
5. While all catalogs are loaded, some vendors with Punchout catalogs may not maintain their test accounts. Therefore, you may not be able to “punch-out” to their site.
6. Customers may create eQuotes in this environment (there will be no supplier responses to award).
7. Customer orders remain in Ordering status and are not received or invoiced when customers create requisitions and select Vendor Locations with a preferred ordering method of “Electronic Ordering.”
8. You can create requisitions as encumbered or unencumbered. Encumbered orders receive encumbrance numbers and encumbrance line numbers via a FLAIR simulation.
9. Even though FLAIR will be in the approval flow, no transactions are sent to FLAIR.
10. The training environment is a different environment than the production environment, and users may experience different performance (i.e., page to page response time) in the training environment.
Segregation of Duties

Each agency’s System Administrator is responsible for considering and assigning appropriate groups and roles to each MFMP agency customer. The group/role assignment process should factor in the checks and balances required for the account holder to execute the responsibilities without compromising security and confidentiality requirements. That includes adherence to Generally Accepted Accounting Principles (GAAP) and segregation of incompatible duties. System Administrators should verify that a customer does not have multiple groups and roles that would adversely affect segregation of duties within a single workflow.

For example, an agency would not want an Invoice Manager to also have purchasing and receiving responsibilities. That allows one person to request, receive and act as the final approver for an invoice.

Two reports are available to help System Administrators monitor for incompatible duties. For additional information, please see Agency Monitoring of MFMP System Groups/Roles below.

Agency Monitoring of MFMP System Groups/Roles

Every agency has access to two weekly, agency-specific reports that list agency MFMP accounts:

1. User Report - Details all individuals within your agency with an MFMP account.
2. Users and Groups Report: Details all individuals within your agency with an MFMP account and details assigned groups/roles.

The MFMP team generates these reports and posts them to the DMS Report website (http://dms-purchasing-ftp.state.fl.us/xx00/). Refer to the Reports job aid located on the MFMP website in the buyer toolkit under MFMP Reporting at http://dms.MyFlorida.com/mfmp_reporting.

These reports are useful in assisting System Administrators to maintain user accounts and you can use them to complete a quarterly access review to ensure that:

- All accounts are current.
- No accounts have incompatible groups/roles.
- You updated supervisor assignments as appropriate.
- Management levels are accurate.
- Ship To and Bill To information is accurate.

You need a username and password to access secure reports, which are posted as zipped documents. You need WinZip (or another comparable tool) to view the data. If you do not have a password to use the DMS Report website, email MyFloridaMarketPlace@dms.MyFlorida.com to request one.
Account Passwords

MFMP is a secure system and it is important that customers keep their account passwords confidential and not share them with others. All passwords expire after 90 days. When your password expires, your new password will need to meet the new password complexity requirements.

MFMP password complexity complies with State of Florida security standards.

— All MFMP 3.0 passwords must be between 7 and 16 characters long with no spaces.
— Passwords need to include:
  — One uppercase letter
  — One lowercase letter
  — One digit – you must locate a single digit within the middle of the password. For example: Password2 and 2Password are invalid; however, Password22 and Pass2word are both valid.
  — You are unable to re-use your past 5 passwords.

In MFMP all customers can reset their own passwords. To reset passwords at a future time, customers need to set secret security questions and answers the first time they log in.

Customers can reset their own passwords, not the MFMP Customer Service Desk (CSD). Agency System Administrators can also reset their customers’ passwords.

If customers choose to reset their own passwords, they receive “Password Reset Instructions” emails. The emails will contain a personalized link that allows the customer to access a new screen to enter a new password. Emails for password reset requests expire 24 hours after they initiate. Upon the creation of a new password, MFMP automatically logs in the customer. Once customers successfully create new passwords, the link in the “Password Reset Instructions” email becomes unusable.

If customers enter three incorrect responses to their secret question, the password reset functionality becomes disabled. If this happens, Agency System Administrators can reset the customers’ passwords (not the MFMP customer service desk).

Resetting your own password:

<table>
<thead>
<tr>
<th>Step by Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1:</td>
<td>Enter your User Name and answer your secret question (remember it is case sensitive).</td>
</tr>
<tr>
<td>Step 2:</td>
<td>Enter your User Name. Once submitted, MFMP delivers password reset guidance to the email address on file in your user profile.</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Click the link in the password reset guidance email.</td>
</tr>
<tr>
<td>Step 4:</td>
<td>On the new screen, define a new password. You must enter the password twice for verification. The system sends a “Password Reset Notification” confirmation email to the customer.</td>
</tr>
</tbody>
</table>

Once you successfully create a new password, the link contained in the “Password Reset Instructions” email is deactivated.
Workflow

MFMP routes items for approval based on approval flows the System Administrator established. Agencies can create approval flows for requisitions, contract requests, invoice reconciliations and requisition cancellations. An agency can elect commodity codes or object codes trigger special approvers. For example, if your agency’s IT department must review all IT purchases, you can add a special approver when a specific commodity code is listed on a requisition.

MFMP recommends the following standard approval flows, which incorporate the basic levels of approval:

**Requisition Catalog and Non-Catalog Approval Flow**

Requester → Management → Special Approver → Budget → Purchasing

FCO
OCO
Fleet
IT

**Contract request Approval Flow**

Purchasing → Special Approver → Budget → Purchasing

FCO
OCO
Fleet
IT

**Invoice Reconciliation Approval Flow**

Exception Handler → Invoice Manager

Agencies can make changes to the current workflow through the Operational Data Updates (ODU) process. To begin the ODU process, email BuyerHelp@MyFloridaMarketPlace.com. Please keep in mind that these changes do require system update and MFMP cannot complete your request immediately.

**Tip:** From the basic, simple workflow, agencies can add / or customize their workflow to accommodate the agency needs
Operational Data Update Process

To initiate a workflow or central receiver update, complete the Workflow Update request form, located on the MFMP Forms Web page. Either your agency Purchasing Director or Finance and Accounting Director must approve all requests.

Once you have agency approval, email the form to the MFMP CSD to begin the ODU process: BuyerHelp@MyFloridaMarketPlace.com. Please keep in mind that these changes do require a system update and MFMP cannot complete them immediately.

Monthly maintenance requests include updates related to central receiving files or approved additions of roles for an agency. All other workflow changes are considered for quarterly implementation.
**Desktop and Central Receiving**

In MFMP, you can receive commodities two ways: desktop or central.

With desktop receiving, the original requester of the product completes the receiving report. Central receiving enables a role to complete the receiving report. Agencies with a dedicated receiving location (warehouse) typically use central receiving.

For central receiving, agencies must identify central receiving locations through the address update eForm.

Agencies often have multiple Ship To and Bill To locations where vendors ship goods and send invoices. As agencies add or change locations, the System Administrator can make the appropriate system updates.

The requester’s Ship To and Bill To addresses automatically populate on the purchase requisition / purchase order based on the information in the customer’s MFMP account profile. The requester can change this information by selecting a different Ship To and Bill To address.

To add or update an address, the System Administrator completes an Address Change eForm that consists of three steps:

**Step 1:**  
- **Title:** Provide an appropriate title for the eForm following your agency’s standard titling convention.  
- **Select Maintenance Mode:** From the dropdown box, select whether you need to add, update or delete an address.  
- **Address:** Select the address; this option is available only if you are updating or deleting an address.

**Step 2:**  
- Populate the required address elements including the office name, city, phone number, etc.  
- **Ship To, Bill To:** Indicate whether you are editing a Bill To or Ship To address. The system default is Ship To.

**Step 3:**  
- Review summary information to verify you made the changes correctly.

The agency must ask MFMP to create a specific central receiving role through the Operational Data Update Process. You need to provide the Unique Address ID on your request.

**Tip:** The Unique Address ID is found on the Address Update eForm through the update feature.

Please keep in mind that these changes do require system update and MFMP cannot complete your request immediately.

Once the role is established, the system administrator can assign the role to the individuals who will receive for that location.
Creating New MFMP Accounts

An MFMP System Administrator’s responsibility includes creating new MFMP accounts. When creating these accounts, the System Administrator should consider the customer’s duties and responsibilities and grant only the access necessary for the customer to complete assigned duties.

To establish a new MFMP account or profile, a System Administrator needs to complete a User Maintenance eForm, which is a three-step process.

### Step 1
**Title:** Provide an appropriate title for the eForm following your agency’s standard titling convention.

### Step 2
**Entity:** This field auto-populates based on the System Administrator’s entity.

### Step 3
**Login Name:** Defaults to the email address name entered before the “@” symbol and is the actual username. We recommend agencies enter the email address in a standard way.

**Name:** Enter the MFMP account holder’s name (please note that you cannot change or amend it).

**Email Address:** The system uses this email address to notify the account holder when something requires approval. Remember, all text before the @ symbol becomes the MFMP username (case sensitive). While you can change the email address, the username stays the same.

**Management Level:** Spend authority (i.e., maximum level or amount this customer can spend/approve without supervisory approval).

**Supervisor:** Enter the account holder’s supervisor’s name when items require supervisory approval (e.g., purchases outside the account holder’s management level).

**Ship To:** Default location that populates on a requisition to identify where goods should be delivered; field auto-populates on the requisition.

**Bill To:** Default location that populates on a requisition to identify where the invoice should be delivered; field auto-populates on the requisition.

**Organization Code:** Default FLAIR organization code that automatically populates when you create a requisition.

**OrgLevel:** Provides the ability to set the organization code spending parameters. The levels follow FLAIR’s organization code levels. L1 enables a customer to charge items to any organization code in the agency. L5 restricts the customer to charging purchases to one organization code.

**PUI:** MFMP PUI number; requisitions/invoices follow this PUI’s workflow.

**Site Code:** FLAIR site code; field auto-populates on the requisition.

**Tip:** You will need separate MFMP accounts if a user works with more than one FLAIR site code.

**Groups and Roles:** Enter the appropriate groups/roles for the account holder. Customers who perform the same functions within MFMP would belong to the same Group. Roles are used for routing. Refer to the Groups and Roles section of this document (page 14).

Confirm the changes and submit the eForm. While you have the option to add an approver, it is unnecessary. Once you create an account, you need to create a Password eForm to establish the account’s initial password.
Understanding the Management Level

The Management Level represents MFMP customer “spend authority.” System Administrators define customers’ spend authority when they create new user accounts. You must enter a number in this required field when establishing a new customer account. It is automatically set to 100, which indicates that the new account has a spend authority of $0 (all requisitions would require a supervisor’s approval).

If a customer creates a requisition for less than the amount identified in the Management Level, the requisition does not require supervisor approval. If the requisition exceeds the Management Level, the requisition does require supervisor approval. The higher the management level, the lower the user’s spend authority (refer to table below).

Only System Administrators can increase or decrease a user’s management level in the system.

<table>
<thead>
<tr>
<th>Management Level</th>
<th>User’s Spend Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>$ 0</td>
</tr>
<tr>
<td>95</td>
<td>$ 250</td>
</tr>
<tr>
<td>90</td>
<td>$ 500</td>
</tr>
<tr>
<td>80</td>
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<tr>
<td>1</td>
<td>$ 9,999,999,999</td>
</tr>
</tbody>
</table>

(Management levels are in spend Authority order.)
Groups and Roles

Customers who perform the same functions within MFMP belong to the same group. A group controls the level of access and what functions a customer can accomplish; groups determine if a customer can edit a requisition or just create a requisition. Groups also control the types of notifications that a customer receives, based on the customer’s notification preferences. Permissions in groups are standard for all the state agencies using MFMP.

<table>
<thead>
<tr>
<th>Groups*</th>
<th>Roles*</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Admin</td>
<td>System Administrator</td>
</tr>
<tr>
<td>Analysis</td>
<td>Invoicing Gatekeeper</td>
</tr>
<tr>
<td>ABOI Edit</td>
<td>Invoice Manager</td>
</tr>
<tr>
<td>Buyer</td>
<td>Exception Handler</td>
</tr>
<tr>
<td>CO No Workflow</td>
<td>Cancellation Approver</td>
</tr>
<tr>
<td>Edit Accounting</td>
<td>Central Receiver</td>
</tr>
<tr>
<td>FLAIR MTCE</td>
<td>Contract Manager</td>
</tr>
<tr>
<td>Invoicing</td>
<td>Purchasing Gatekeeper</td>
</tr>
<tr>
<td>Contract</td>
<td>Purchasing Office</td>
</tr>
<tr>
<td>Contract Exemption</td>
<td>Purchasing Agent</td>
</tr>
<tr>
<td>Contract Manager</td>
<td>Contract Office</td>
</tr>
<tr>
<td>eQuote</td>
<td>Contract Specialists</td>
</tr>
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<td>Contract Manager</td>
</tr>
<tr>
<td>Query</td>
<td>FCO Approver</td>
</tr>
<tr>
<td>Transaction Fee Exempt</td>
<td>FA Approver</td>
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<td>Legal Approver</td>
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<td>OCO Approver</td>
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<td>Req Approver</td>
<td>Telecommunications Approver</td>
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<td>ADA</td>
<td>Executive Approver</td>
</tr>
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<td>No Approver Emails</td>
<td>IT Approver</td>
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<td>No Supervisor</td>
<td>Fleet Approver</td>
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<td>No Watcher Emails</td>
<td>Budget Office</td>
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<td></td>
<td>Budget Approver</td>
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<td>Reprographic Approver</td>
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<tr>
<td></td>
<td>Quality Assurance Approver</td>
</tr>
<tr>
<td></td>
<td>Mobile Equipment Approver</td>
</tr>
<tr>
<td></td>
<td>Personal Approver</td>
</tr>
<tr>
<td></td>
<td>Telecommunications Executive Approver</td>
</tr>
<tr>
<td></td>
<td>Insurance Approver</td>
</tr>
</tbody>
</table>

Use roles for approval routing purposes only. If a customer is required to approve invoice reconciliations for an agency, the customer needs to have the roles that are part of the agency’s predefined workflow. Roles do not grant customers’ permission or determine the customers’ functionality. All roles begin with an agency’s PUI; the only exception to the rule is for Central Receivers. MFMP uses roles for PUI and statewide routing in workflow processing.

In the following sections:

“Inherits” means you automatically have the capability listed as part of your group.

“eForm Access” means you use the listed eform, found in MFMP.

*These are the most commonly used Groups and Roles.
**System Administrator**

| System Admin group  | Description: Allows customers to add, update, delete and inactivate customers from the system. They can also reset customers’ passwords and add new, or modify existing, Bill To or Ship To addresses in the system. *Only a limited number of customers per agency should belong to this group for security purposes.* DMS grants initial System Administrator access to agencies new to MFMP.  
  
eForm Access: Address Change, Password Update, User Maintenance, Invoice  

| Analysis group  | Description: Allows customers to access Analysis (My Dashboard). Customers are able to run ad-hoc reports on historical transactions, and export reports into Excel. While Analysis is a robust tool, it can be complex.  
  
eForm Access: Invoice  

| System Administrator roles  | PUI XXXX: System Administrator  

**Tip:** If you have a question on groups or roles, please contact the MFMP Customer Service Desk at (866) 352-3776.

**Tip:** Give the Query group to customers so they can search for requisitions, orders, receipts, invoices, or invoice reconciliations another customer created.
<table>
<thead>
<tr>
<th>Finance and Accounting</th>
<th>Description: Allows customers to access Analysis (My Dashboard). Customers are able to run ad-hoc reports on historical transactions and export reports into Excel.</th>
<th>eForm Access: Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABOI Edit group</td>
<td>Description: Allows customers to edit the Available Balance Override Indicator (on the Accounting details page of a requisition or invoice reconciliation).</td>
<td>eForm Access: Invoice</td>
</tr>
<tr>
<td>CO No Workflow group</td>
<td>Description: Allows customers to make specific changes to a requisition without generating the workflow. A customer can change 38 fields without generating the requisition workflow.</td>
<td>eForm Access: Invoice</td>
</tr>
<tr>
<td>Edit Accounting group</td>
<td>Description: Enables customers to edit all accounting fields. This group allows customers to edit more than just the Organization Code, and Expansion Option and Object Code. To edit accounting information on a requisition, a customer needs to have a Requester or Purchasing group.</td>
<td>eForm Access: Invoice</td>
</tr>
<tr>
<td>FLAIR Maintenance group</td>
<td>Description: Allows customers to create a FLAIR Maintenance eForm. Invoice managers, customers with Release Encumbrance eForm Access, and the single agency encumbrance account must have FLAIR Maintenance group access.</td>
<td>eForm Access: Invoice, FLAIR Login Information eForm</td>
</tr>
<tr>
<td>Invoicing group</td>
<td>Description: Allows customers to reconcile, submit, approve, reject and refer IRs (invoice reconciliations).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Inherits: Edit Accounting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>See Appendix 1 for a listing of the fields.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>eForm Access: Invoice, Payment Update, Release Encumbrance, Delete Disbursement, Restore Payment Amount</td>
<td></td>
</tr>
<tr>
<td>Finance and Accounting Roles</td>
<td>PUI XXXX: Invoicing Gatekeeper</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PUI XXXX: Invoice Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PUI XXXX: Exception Handler</td>
<td></td>
</tr>
<tr>
<td>Purchasing</td>
<td>Description</td>
<td>eForm Access</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Analysis group</td>
<td>Allows customers to access Analysis (My board). Customers are able to run ad-hoc reports on historical transaction and export reports into Excel.</td>
<td>Invoice</td>
</tr>
<tr>
<td>CO No Workflow group</td>
<td>Allows customers to make specific changes to a requisition without generating the workflow. A customer can change 38 fields without generating the requisition workflow. See Appendix 2 for all the fields.</td>
<td>Invoice</td>
</tr>
<tr>
<td>Contract group</td>
<td>Allows customers to create and edit Contract Requests</td>
<td>Invoice</td>
</tr>
<tr>
<td>Contract Exemption group</td>
<td>Allows customers to create and edit a Contract Exemption eForm to exempt a contract from the 1 percent transaction fee.</td>
<td>Invoice and Contract Exemption</td>
</tr>
<tr>
<td>Contract Manager group</td>
<td>Allows customers to create a contract request and edit a Restore Contract eForm.</td>
<td>Invoice and Restore Contract</td>
</tr>
<tr>
<td>Edit Accounting group</td>
<td>Enables customers to edit all accounting fields. This group allows customers to edit more than just the Organization Code, and Expansion Option and Object Code. Without this group, customers can edit only the organization code, expansion option and object code.</td>
<td>Invoice</td>
</tr>
<tr>
<td><strong>Purchasing (continued)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
</tbody>
</table>
| **eQuote group** | **Description:** This group allows customers the ability to access the eQuote punchout site. You must have this group in conjunction with a Requester or Purchasing group. Using eQuotes, you can get electronic quotes from vendors who participate in the eQuote process. (When a vendor registers in MFMP, the vendor has the opportunity to select if they want to participate in eQuotes.)  
**eForm Access:** Invoice |
| **Purchasing group** | **Description:** Customers in this group can edit and approve requisitions. They can also generate Sourcing Requests for a Contract (Master Agreement).  
**Inherits:** PO Not Sent  
**eForm Access:** Invoice and Cancel Requisition |
| **Query group** | **Description:** Allows customers to perform system searches. Without this group, customers can search only for items they created or approved.  
**eForm Access:** Invoice |
| **Transaction Fee Exempt group** | **Description:** Customers in this group can exempt a requisition from the 1 percent transaction fee. Mark as exempt only transactions exempt by Rule, 60A-1.032.  
**eForm Access:** Invoice |
| **Purchasing roles** | **PUI XXXX:** Cancellation Approver  
**PUI XXXX:** Contract Manager  
**PUI XXXX:** Purchasing Gatekeeper  
**PUI XXXX:** Purchasing Office  
**PUI XXXX:** Purchasing Agent |
<table>
<thead>
<tr>
<th>Contracting</th>
<th>Description: Allows customers to create and edit Contract Requests.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract group</td>
<td>Inherits: Edit Accounting; Query group</td>
</tr>
<tr>
<td></td>
<td>eForm Access: Invoice</td>
</tr>
<tr>
<td>Contract Exemption group</td>
<td>Description: Allows customers to create and edit a Contract Exemption eForm that can exempt a contract from the 1 percent transaction fee. Always complete this form if contract is exempt.</td>
</tr>
<tr>
<td></td>
<td>eForm Access: Invoice and Contract Exemption</td>
</tr>
<tr>
<td>Contract Manager group</td>
<td>Description: Allows customers to create a contract request and edit a Restore Contract eForm.</td>
</tr>
<tr>
<td></td>
<td>Inherits: Edit Accounting; Query group</td>
</tr>
<tr>
<td></td>
<td>eForm Access: Invoice and Restore Contract</td>
</tr>
<tr>
<td>Contracting roles</td>
<td>PUI XXXX: Contract Office</td>
</tr>
<tr>
<td></td>
<td>PUI XXXX: Contract Specialist</td>
</tr>
<tr>
<td></td>
<td>PUI XXXX: Contract Manager</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>Edit Accounting group</td>
<td>Enables customers to edit all accounting fields. Without this group, customers can edit only the organization code, expansion option and object code. To edit accounting information on a requisition, customers need to have the Requester or Purchasing group.</td>
</tr>
<tr>
<td>eForm Access: Invoice</td>
<td></td>
</tr>
<tr>
<td>eQuote group</td>
<td>This group allows customers to complete electronic quotes in the Sourcing tool. Using eQuotes, you can get electronic quotes from vendors who participate in the eQuote process. The CSD can grant agency customers equote access.</td>
</tr>
<tr>
<td>Query group</td>
<td>Allows customers to perform system searches. Without this group, customers can search only for items they created or approved.</td>
</tr>
<tr>
<td>eForm Access: Invoice</td>
<td></td>
</tr>
<tr>
<td>Requester group</td>
<td>Allows customers to create and submit requisitions.</td>
</tr>
<tr>
<td>eForm Access: Invoice and Cancel Requisition</td>
<td></td>
</tr>
<tr>
<td>PO Not Sent group</td>
<td>Allows customers to indicate when a PO should not be sent to a vendor. Note: The MFMP team manages eQuote User group access. If a customer requires eQuote access, contact the MFMP CSD at <a href="mailto:BuyerHelp@dms.MyFlorida.com">BuyerHelp@dms.MyFlorida.com</a>.</td>
</tr>
<tr>
<td>eForm Access: Invoice</td>
<td></td>
</tr>
<tr>
<td>Requester roles</td>
<td>Not Applicable Requesters do not require roles.</td>
</tr>
</tbody>
</table>
| Approver | Description: Allows customers to edit and approve requisitions sent for approval. Supervisors who are required to approve their subordinates’ requisitions should have this role. This group approves requisitions based on commodity codes and/or dollar thresholds. Members of this group cannot edit accounting.  
**eForm Access:** Invoice |
| --- | --- |
| **Req Approver group** | **Description:** Enables customers to edit all accounting fields. Without this group, customers can edit only the organization code, expansion option and object code. To edit accounting information on a requisition, customers need to have the Requester or the Purchasing group.  
**eForm Access:** Invoice |
| **Edit Accounting group** | **Description:** Allows customers to perform system searches. Without this group, customers can search only for items they created or approved.  
**eForm Access:** Invoice |
| **Query group** | **Approver roles**  
PUI XXXX: FCO Approver  
PUI XXXX: FA Approver  
PUI XXXX: Legal Approver  
PUI XXXX: OCO Approver  
PUI XXXX: Telecommunications Approver  
PUI XXXX: Executive Approver  
PUI XXXX: IT Approver  
PUI XXXX: Fleet Approver  
PUI XXXX: Budget Office  
PUI XXXX: Budget Approver  
PUI XXXX: Reprographic Approver  
PUI XXXX: Quality Assurance Approver  
PUI XXXX: Mobile Equipment Approver  
PUI XXXX: Personal Approver  
PUI XXXX: Telecommunications Executive Approver  
PUI XXXX: Insurance Approver |
<table>
<thead>
<tr>
<th>Non-specific Groups</th>
<th>Description</th>
<th>eForm Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADA group</td>
<td>For customers with this group, the system removes some tables and scroll bars, which makes screen readers more effective.</td>
<td>Invoice</td>
</tr>
<tr>
<td>Analysis group</td>
<td>Allows customers to access Analysis. Customers are able to run ad-hoc reports on historical transactions and export them into Excel.</td>
<td>Invoice</td>
</tr>
<tr>
<td>No Approval Emails group</td>
<td>Prevents customers from receiving notifications for items awaiting required approvals. In lieu of the group, customers can also customize email notifications by updating their customer preferences.</td>
<td>Invoice</td>
</tr>
<tr>
<td>No Supervisor group</td>
<td>Allows customers to have no supervisor assigned on the customer profile. If an approval is pending a customer with this group, the item does not escalate if it is overdue. Additionally, a requisition does not require management approval no matter the cost if a customer has the ‘No Supervisor’ group.</td>
<td>Invoice</td>
</tr>
<tr>
<td>Note: A customer must have a management level of 1 or $9,999,999,999 and the supervisor set at no value on the customer profile.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Watcher Emails group</td>
<td>Prevents customers from receiving notifications for items pending their optional approval. Customers can also customize their email notifications by updating their customer preferences.</td>
<td>Invoice</td>
</tr>
<tr>
<td>Query group</td>
<td>Allows customer to perform system searches. Without this group, customers can search only for items they created or approved.</td>
<td>Invoice</td>
</tr>
<tr>
<td>Buyer group</td>
<td>This group does not give any permissions, only access to MFMP. Inactive customers are given this group, without any roles.</td>
<td>Invoice</td>
</tr>
</tbody>
</table>
**MFMP Customer Account Inactivation**

It is each agency System Administrator’s responsibility to maintain account information for all customers with MFMP access. There are occasions when you need to inactivate an account (e.g., employee retires, transfers to another agency, terminates, etc). There are several actions a System Administrator must take to successfully transfer responsibilities from one customer to another.

Assign roles to another user who assumes the approval responsibility for roles that were assigned *exclusively* to the employee account. This is important when considering special approvers of specific commodity and object codes.

If a user is changing to a different area of the same agency and still requires MFMP access, DMS recommends inactivating the old account and setting up a new account for the new position.

### Account Inactivation Steps

**Step 1:** Change the account password to prevent the user from accessing the system.

**Step 2:** Log in as the departing employee and provide screenshots of the following to the new user responsible:

- Approve Requests queue
- Open Order queue (found by clicking the Approved queue from the shortcut menu and grouping the queue by type)
- Reconcile Invoices queue

**Step 3:** Click the Composing link on the shortcut menu and delete all transactions listed within this queue.

**Step 4:** Log in as the System Administrator, and update the User Maintenance eForm:

- Update the email address to the email address of the user now responsible for those approvals.
- In the User Maintenance eForm Name field, add the label ‘inactive’ before the customer’s name (e.g., Inactive-John Doe).

**Tip:** The user who will assume approval responsibility should not use the same Name field of the user to be inactivated.

**Step 5:** Verify the departing employee is not listed as the supervisor for other users by reviewing the User and Groups report available on the MFMP Reports website. If he/she is another user’s supervisor, use the User Maintenance eForm to select a different supervisor for the impacted users.

**Step 6:** Remove all roles and groups with the exception of the Buyer group.

**Step 7:** Delegate the approval authority to another user. Once you delegate the user approval authority, the delegate can perform the following actions:

- Approve/Deny requests that list the departing employee (either by name or a role) as a required approver
- Receive commodity orders (either by name or central receiving role)
- Process invoices routed to the departing employee
Account Deletion Steps

After performing the activities highlighted in the Account Inactivation section, you can delete a user account if the employee:

**Step 1:** Acted as an Approver only or,

**Step 2:** Does not have any requests in the following statuses:
- Composing
- Submitted
- Approved
- Ordering
- Ordered
- Canceling
- Receiving

**Step 3:** Did not create a requisition ‘On Behalf Of’ another user

Delete the user account by using the User Maintenance eForm and select the ‘Delete’ maintenance mode. Once you successfully delete a user account, you cannot conduct a system search for any transactions created ‘On Behalf Of’ or ‘Prepared’ by the departing employee.
Appendices
### Appendix 1 - Edit Accounting

<table>
<thead>
<tr>
<th>Field</th>
<th>Program</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable</td>
<td>State Program</td>
<td>External Object</td>
</tr>
<tr>
<td>Payable Number</td>
<td>External Program</td>
<td>Grouping Character</td>
</tr>
<tr>
<td>Payable Line Number</td>
<td>Grant</td>
<td>BPIN</td>
</tr>
<tr>
<td>Final Payment Indicator</td>
<td>Other Cost Accumulator</td>
<td>Certified Forward Indicator</td>
</tr>
<tr>
<td>Contract Encumbrance Number</td>
<td>Contract</td>
<td>Batch</td>
</tr>
<tr>
<td>Contract Encumbrance Line Number</td>
<td>Agency Unique</td>
<td>Description</td>
</tr>
<tr>
<td>Organization Code</td>
<td>Contract Year</td>
<td>Quantity</td>
</tr>
<tr>
<td>Expansion Option</td>
<td>Grant Year</td>
<td>Count</td>
</tr>
<tr>
<td>Object Code</td>
<td>Project ID</td>
<td>Sub-Vendor</td>
</tr>
<tr>
<td>Budget Entity</td>
<td>Ext Category</td>
<td>Times</td>
</tr>
<tr>
<td>Int Budget Indicator</td>
<td>General Ledger</td>
<td>Unit</td>
</tr>
<tr>
<td>Category</td>
<td>External General Ledger</td>
<td></td>
</tr>
<tr>
<td>Category Year</td>
<td>Product ID</td>
<td></td>
</tr>
</tbody>
</table>

### Appendix 2 - CO No Workflow

<table>
<thead>
<tr>
<th>Field</th>
<th>Program</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Start Date</td>
<td>Int Budget Ind</td>
<td>Gen Led</td>
</tr>
<tr>
<td>PO End Date</td>
<td>Category</td>
<td>Encumbrance Gen Led</td>
</tr>
<tr>
<td>PUI</td>
<td>Category Year</td>
<td>Ext Gen Led</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>State Program – Standard</td>
<td>Encumbrance Ext Gen Led</td>
</tr>
<tr>
<td>Line item description</td>
<td>External Program</td>
<td>Product ID</td>
</tr>
<tr>
<td>Available Balance Override Indicator</td>
<td>Grant</td>
<td>Ext Object</td>
</tr>
<tr>
<td>Advanced Payment Indicator</td>
<td>Other Cost Accum</td>
<td>CF</td>
</tr>
<tr>
<td>Organization Code</td>
<td>Contract</td>
<td>Batch</td>
</tr>
<tr>
<td>Expansion Opt</td>
<td>Agency Unique</td>
<td>Description (Split Accounting description)</td>
</tr>
<tr>
<td>Opt Version</td>
<td>Contract Year</td>
<td>Quantity</td>
</tr>
<tr>
<td>Object Code</td>
<td>Grant Year</td>
<td>Count</td>
</tr>
<tr>
<td>Prior Period Indicator</td>
<td>Project ID</td>
<td>Sub-Vendor</td>
</tr>
<tr>
<td>Budget Entity</td>
<td>Ext Category</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 3 - SAMPLE CONFIDENTIAL INFORMATION POLICY

Due to the sensitive nature of the information that may be transmitted in MyFloridaMarketPlace, we advise each agency to adopt a confidential information policy. Use this sample policy to customize for your agency.

I. Policy

This section should include a general policy statement that explains why the agency should not disclose protected information (e.g., HIPAA and privacy laws). Also include information about proposed disciplinary action(s) for policy violations.

Sample Language:

<INSERT AGENCY NAME> will not disclose protected information violating areas referenced in Chapter 119, Florida Statute, as well as federal law and regulations such as HIPAA, and any other state confidentiality laws. This policy provides guidelines for management and workforce members to ensure that confidential information is edited or redacted out of supporting documentation scanned into MyFloridaMarketPlace (MFMP), and is not entered into any MFMP comment boxes. It applies to all workforce members of <AGENCY NAME> who scan and/or attach documents or enter comments into MFMP. Employees who deliberately violate this policy are subject to disciplinary action up to and including termination.

II. Authority

This section defines authority for the confidential information policy.

Sample Language:

<INSERT AGENCY NAME> will adhere to any State or Federal law and regulations regarding confidential information.

III. MFMP Security Officer – Signature Block with Effective Date

This section identifies the person the agency designates to be responsible to verify no confidential information is input into the system.

Sample Language:

The Agency assigns an MFMP Security Officer to oversee the administration of this policy. The MFMP Security Officer is responsible for monitoring that all Agency MFMP users receive training on the policy and comply with the policy. If the Agency MFMP Security Officer finds confidential information in the MFMP system, s/he identifies the nature of the confidential information, notifies the Agency’s Inspector General, and expedites a purge request.

<INSERT MFMP SECURITY OFFICER SIGNATURE AND TITLE>

DATE:

<INSERT AGENCY HEAD SIGNATURE AND TITLE>

DATE:

<INSERT AGENCY NAME>
IV. Definitions

This section includes relevant definitions of terms used in the policy.

Sample Language:

A. HIPAA: Health Insurance Portability and Accountability Act of 1996 – Law that provides compliance guidelines for handling of Protected Health Information and other confidential personal information.


C. Supporting Attachments:

1. Purchase Order Processing

   Attachments sent to vendor: Any necessary terms and conditions not entered into the system, but required for the vendor to have the complete description of the transaction. Examples include specification sheets, diagrams and sketches, or portions of statements of work or supplier contract forms that have not already been made available to vendor.

2. Payment Processing

   Attachments made by a PO-based or Contract-based invoice, or paper invoices attached in MFMP, and any other supporting documentation needed to support the transaction and/or show compliance with applicable laws, rules and regulations.

D. Confidential Information (related directly to an individual):

   Law prohibits you from including Confidential Information related directly to an individual from being included in MFMP. This includes information in the comments field, line item description as well as attachments. The following list is not exhaustive, but provides the common types of confidential information to redact from attachments included in MFMP. Direct agency-specific questions about confidential information to the agency’s HIPAA compliance officer or General Counsel Office.

   1. Names/ Titles
   2. All geographic subdivisions smaller than a state, including street addresses, city, county and zip codes.
   3. All elements of dates (except year) directly related to an individual, including birth date, admission date, discharge date and date of death.
   4. Telephone numbers
   5. Electronic mail addresses
   6. Social Security numbers
   7. Medical record numbers
   8. Health plan beneficiary numbers
   9. Account numbers
   10. Certificate/license numbers

V. Procedure

This section includes agency-specific procedures to complete on a daily, monthly, quarterly, and annual basis.

Sample Language:

Agency staff shall adhere to the following:

A. Agency MFMP customers exclude confidential information, by entry or attachment into MFMP.
B. Purchasing staff copies purchase order supporting documentation and edits or redacts all confidential information prior to scanning into MFMP. Maintain originals for subsequent audit purposes.

C. Accounting staff copies supporting documentation for paper invoices, contractual service agreements, and any other payment documents, and edits or redacts all confidential information prior to scanning into MFMP. Maintain originals for subsequent audit purposes.

D. Take the following action if you identify a transaction with confidential information: Any requisition or invoice a subsequent approver receives that contains confidential information is denied back to the buyer to delete the transaction and prepare a new transaction.

E. Staff excludes any confidential information into any MFMP comment boxes.

Note: The originator of the confidential comment or attachment can delete it. If the originator is no longer with the agency, follow the Attachment Purge Process by submitting the PUR 3785 form (in the MyFloridaMarketPlace toolkit).

Training:

Agency develops and adopts a training policy, or revises current training policy to incorporate training related to requirements around confidential information / protection of secure information. Specifically, the training policy should provide the following:

A. In addition to MFMP system training and prior to being granted access to the MFMP system, each new hire receives training on the agency’s confidential information policy, including escalation procedures when you identify confidential information.

B. By August 1 of each year, all employees with access to MFMP receive refresher training on the agency’s confidential information policy, including escalation procedures when you identify confidential information.

On a monthly basis, the MFMP Security Officer:

A. Conducts a sampling of 10 percent of transactions (purchase orders and invoices), and reviews attachments and comments to ensure that confidential information has not been included.

Note: The originator of the confidential comment or attachment can delete it. If the originator is no longer with the agency, follow the Attachment Purge Process by submitting the PUR 3785 form (in the MyFloridaMarketPlace toolkit).

On a quarterly basis, the MFMP Security Officer:

A. Sends an email to remind all agency customers to remind them of their responsibilities for identifying, removing and protecting confidential information.

B. Reviews agency assignment of roles. MFMP Security Officer reviews employee position descriptions and assigns MFMP user roles based on the stated job responsibilities. Limit roles with ‘QueryAll’ access to staff that need this access to perform their job responsibilities.

C. Reviews agency training to verify that it includes information regarding:

   1. The redaction of confidential information from attachments to be included in MFMP
   2. The attachment removal process that can be initiated by completing form PUR 3785 should confidential information be identified in the system.

On an annual basis, the MFMP Security Officer:

A. Reviews and signs off on the agency’s security and training policies.

B. Submit the policies to the Department of Management Services no later than August 31 every year.
If you identify a violation or have specific questions about this policy, immediately consult with the agency MFMP Security Officer.

VI. Distribution List:

This section includes a list of agency personnel that receive this policy and associated updates.

VII. History / Updates to this Document:

This section includes the creation date and any subsequent dates of policy updates. Include reference to the policy updates being redistributed to those on the distribution list.

Sample Language:

A. Created on: <INSERT DATE>

B. Update made by <INSERT NAME>, and redistributed to distribution list on <INSERT DATE>

C. Update made by <INSERT NAME>, and redistributed to distribution list on <INSERT DATE>

D. Etc.

Note: This is a sample policy, intended to assist you with creating a policy based on your agency standards.
MFMP System Administrator Glossary
When working as a System Administrator in MyFloridaMarketPlace, you should know these general MFMP terms:

- **Ad-Hoc Report** – A customized report that is the result of a data analysis that you complete within the MyFloridaMarketPlace Analysis tool.

- **Agency** – Any of the various state offices, departments, boards, commissions, divisions, bureaus and councils, and any other unit of organization, however designated, of the executive or cabinet branch of state government. “Agency” does not include the university and college boards of trustees or the state universities or colleges.

- **Approval authority** – The responsibility to approve a request for a delegated customer in the system.

- **Approvable** – A transaction that requires approval from designated personnel, called an Approver, in the MyFloridaMarketPlace system before you can take further action.

- **Approval flow** – Approval flows specify which individual(s) reviews a transaction prior to its acceptance in MyFloridaMarketPlace. Customers can view the approval flow in the system.

- **Approver** – A customer with the authority to approve a transaction when it is active in the approval queue. In many cases, a set of approvers with different levels of approval authority are required to approve a transaction, as indicated in the approval flow.

- **Available Balance** – The Available Balance File is an auxiliary file, from FLAIR, that maintains current balances for Fund Cash, Unexpended Fund Releases, Organization Cash and Organization Allotments. Customers with the appropriate group may override the automatic system check of this file by selecting the Available Balance Override Indicator (ABOI).

- **Bill To Address** – The Bill To Address is where invoices for goods and services must be sent, and the date the invoice is received at this location is used to determine the Invoice Received Date.

- **Buyer** – A term used to identify anyone who requisitions or processes a purchase order or invoice for goods and services through the system (i.e., customer).

- **Central Receiver** – The customer(s) identified to receive goods shipped to an agency’s central receiving address.

- **Change Order** – Requisition that results from changes to a Purchase Order. Once the changes to the Purchase Order are approved, the “change order” is transmitted to the vendor and a new version of the Order is created.

- **Contracts** – A formal agreement set up electronically in MyFloridaMarketPlace through which a customer can create Contract Requests (CR). A Contract or C number is set up for every State Term Contract available as a catalog. MFMP 3.0 will use some legacy MA numbers.

- **Delegatee** – Customer with delegated approval authority by another customer.

- **Delegator** – Customer with delegated approval authority to another customer in the User Profile.

- **Desktop Receiving** – Receiving process for purchases where the original requester is responsible for completing the receipt.

- **eForm** – An electronic form.

- **eQuote** – Electronic quotation for goods and/or services submitted to vendors and responded to electronically. Vendors must select to receive eQuotes when they complete the Vendor Registration.

- **Groups** – System administrators assign groups and their corresponding permissions to customers to control the level of access a customer can have to system functions, notifications or operations.

- **Invoice** – A document, written or electronic, delivered to the Bill To address indicated on the Purchase Order showing the itemization of goods and/or services rendered, their associated costs and the total costs.

- **Invoice Reconciliation (IR)** – MFMP creates an IR is when an Invoice eForm is submitted in MFMP or a vendor submits an electronic invoice. The IR shows all exceptions that must be reconciled before it can be approved for payment.

- **Log Out Warning** – When your session has been idle for 14 minutes, a Logout Warning popup with a countdown of 60 seconds, appears on the screen.
• **Menu Bar** – Located at the top of the screen, the menu bar provides direct access for the customer to open the home page, logout, preferences, tips, currency and online help.

• **MyFloridaMarketPlace (MFMP)** – The State of Florida eProcurement system.

• **Parallel Approver** – Approvers in parallel receive a transaction simultaneously. The transaction cannot fully process until all the approvers in parallel have approved it.

• **Purchasing Unit Identifier (PUI)** – A number that defaults based on the requester’s profile and used by the system for transaction routing purposes.

• **Purchase Order (PO)** – MFMP automatically generates purchase orders when a requisition is fully approved. MFMP then sends POs to the chosen supplier by fax, email, or through the vendor ASN account (depending on the vendor’s preferred method). Encumbered orders generate an alpha-numeric PO number and unencumbered orders generate a “PO” number.

• **Redact** – Obscure or remove sensitive (confidential) information before scanning and attaching a document into MFMP.

• **Requester** – The customer listed in the ‘On Behalf Of’ field on a requisition when a need for procuring goods or services is established.

• **Requisition (PR)** – A request created to identify a need to procure a commodity and/or service. Once fully approved a purchase order automatically generates.

• **Requisition Number** – A unique number MFMP assigns to identify each requisition.

• **Roles** – Roles are PUI specific and used for routing purposes in the approval workflow. Customers may have no roles or multiple roles based on their position.

• **Security Administrator** – Individual responsible for creating, updating, deleting and inactivating the agency’s user profiles, Ship To and Bill To addresses, as well as establishing and resetting passwords; also known as System Administrator.

• **Session** – A single period of time of use in the MFMP system. A customer’s session will time-out after 15 minutes of inactivity.

• **Ship To Address** – The address where goods are shipped and services are rendered.

• **User Profile** – The user profile is the set of information that contains a specific customer’s preferences and settings in addition to his/her roles and groups in the system.

• **Watcher (Optional Approver)** – A customer added to an approval flow for the purpose of monitoring a transaction but without authority to approve or deny.
MFMP Resources
Resources
For questions or assistance, contact the MyFloridaMarketPlace customer service desk at (866) 352-3776 or BuyerHelp@MyFloridaMarketPlace.com.

Accessing MFMP (Buyer)
https://Buyer.MyFloridaMarketPlace.com/Buyer/Main

MFMP Toolkit

View and use the information to remain up-to-date on MFMP, including:

- Bulletin board
- Training courses and materials
- Meeting materials (presentations and minutes)
- MFMP forms
- Job aids
  

MFMP Training Resources

- Seminar training opportunities
- Webinar sessions
- MFMP Training tours
- Training Materials
- Registration and Manuals
- MFMP Training Environment
  
  https://trn-buyer.MyFloridaMarketPlace.com/Buyer/Main

- Buyer OnDemand Training tool
  
  http://training.myfloridamarketplace.com/buyer/toc.html

Vendor Searches

- Vendor Administrative Lookup tool
  
  Username and password: publicuser (must be lowercase)

- MarketView
  
  http://fcn.state.fl.us/owa_spurs/owa/spurs_www.main_menu_form
  No username or password required