MFMP System Administrator Manual

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Table of Contents

MFMP System Administrator Responsibilities

The Department of Management Services (DMS) delegated the MyFloridaMarketPlace (MFMP) System Administration responsibilities to individual agencies and each agency specifies individual customers to serve as System Administrators. A brief overview of the System Administrator's responsibilities is listed below:

- Works with the agency's Purchasing and Finance & Accounting Liaisons
- Submits the agency's annual Confidential Information Policy
- Actively participates in MFMP sponsored meetings and events
- Aids with monitoring confidential data
- Ensures proper training for individuals with access to MFMP
- Creates new MFMP accounts, including the agency's MFMP FLAIR encumbrance account
- Assigns the necessary groups/roles for each customer
- Monitors, updates, and inactivates customers' accounts
- Resets account passwords
- Sets up and maintains the agency's Ship To and Bill To addresses
- Maintains the agency's approval flows for requisitions and invoices
- Aids with maintaining the MFMP agency distribution lists
- Distributes MFMP communications to all agency customers, unless done by the agency's Purchasing and/or Finance and Accounting Liaisons

> **Tip:** The MFMP team recommends that the primary System Administrator assign at least one backup System Administrator for the agency. This is done to confirm coverage when the primary System Administrator is out of office. Due to the critical nature of this role, the primary System Administrator should only provide this level of access to a small amount of staff members.

Purchasing and Finance & Accounting Liaisons Responsibilities

Purchasing and Finance & Accounting Liaisons are responsible for distributing MFMP communications to all agency customers; however, depending on the size of the agency, some System Administrators may be responsible to perform the responsibilities of a liaison. Some liaison responsibilities are:

- Representing their agencies' point of view in MFMP meetings
- Promote the MFMP program at their agencies
- Fully understand MFMP's functionality

MFMP Communication and Meeting Matrix

The following table outlines planned communication events. The communication matrix includes communication topics, objectives, form, audience, and frequency. MyFloridaMarketPlace sends communications on certain topics listed below based on MFMP Distribution List selections. See the MFMP Distribution List section for more information.

Topic	Audience	Form	Frequency
Change Review Board (CRB)*	MFMP Distribution List	Meeting	Quarterly
Commodity Code Annual Update	System Admin and Liaisons	Email	Annually
Customer Round Table (CRT)*	MFMP Distribution List	Meeting	Quarterly
Customer Satisfaction Survey	State agencies	Email	Annually
eQuote Outliers	eQuote creator, Purchasing Director, and System Admin	Email	As needed
Important alerts or notifications	State agencies and vendors	Email, DMS website, newsfeed, CSD signatures	As needed
Inside MFMP U	System Admin and Liaisons	Email	Quarterly
Known Issues	System Admin and Liaisons	Email	Monthly
Maintenance Windows*	MFMP Distribution List	Email, DMS website	As needed
Meeting notices	Agency purchasing and F&A liaisons	Email, DMS website	As needed
MFMP for Vendors	Registered Vendors	Email	Quarterly
Open Agency Ticket Report	Impacted Agency purchasing and F&A liaisons	Email	Weekly
Release Notes*	MFMP Distribution List	Email, DMS website	Every other month
Survey for Resolved CSD Tickets	Applicable state agencies and vendors	Email	Daily
Training*	MFMP Distribution List	Email	Varies by course
Unmatched Invoices	Impacted state agencies	Email	Daily
Utilization Scorecard*	DMS Leadership and MFMP Distribution List	Email	Quarterly
Vendor Inactivations and Vendors with Invalid Data	State agency purchasing and F&A liaisons	Email	Weekly

*Communications are sent to agency customers based on their distribution list selections

MFMP Distribution List

MyFloridaMarketPlace maintains an enterprise-wide distribution list of agency customers who have selected to receive communications on a variety of MFMP-related topics. System Administrators are responsible for maintaining their agency's distribution list selections and contact information. Each agency should have at least one customer assigned to each distribution list role and topic (see table below) to make sure that they will receive all communications. System Administrators should review their distribution list selections on a regular basis and contact the MFMP Customer Service Desk if their agency needs to make an update, addition, or deletion to their MFMP distribution list selections. Please provide the customer's name, email address, role (if applicable), and selected topics when requesting an update. The available communication topics and/or roles are:

Roles:	Topics:
Agency Purchasing Director	Utilization Scorecard
Agency F&A Director	Customer Round Table Meeting Invitations
Purchasing Liaison	Change Review Board Meeting Invitations (if a cabinet level agency)
Finance and Accounting Liaison	Training Information
Transaction Fee Dispute Liaison	Outage Information
System Administrator	Release Notes/Maintenance Windows

Account Passwords

MyFloridaMarketPlace is a secure system and it is important that customers keep their account passwords confidential. All passwords are maintained in the Buyer application and expire after 90 days. When a customer's password expires, the new password will need to meet the MFMP password complexity requirements, which complies with the State of Florida's security standards. Passwords can only be reset within the MFMP Buyer application.

- All MFMP passwords must be between 7 and 16 characters long with no spaces
- Customers are unable to re-use their past five passwords
- Passwords need to include at least:
  - One uppercase letter
  - One lowercase letter
  - One number
    - One digit must be included between the first and last character
      - Valid Examples: Password22 and Pass2word
      - Invalid Examples: Password2 and 2Password

Password Reset

In MFMP, all customers can reset their own passwords by establishing secret security questions and answers. The MFMP team recommends that agency customers set up their secret security questions and answers during their first login to the Buyer application. Customers who have set up their secret security questions and answers can reset their own passwords in the Buyer application.

Resetting Passwords:

1. From the Buyer login screen, click the *Forgot your Password?* link
2. Enter Username and click *Submit* (Usernames are case sensitive)
3. Enter the answer to the secret question and click *OK* (answers are case sensitive)
4. Once the secret question has been answered and submitted, MFMP will send the *Password Help Request* email to the customer's email address on file
5. Click the link in the *Password Help Request* email. Please note that *Password Help Request* emails will automatically expire 24 hours after they are initiated
6. Create a new password, secret question, and secret answer. Click *OK* to complete the process

Password Change eForm:

When a customer enters three incorrect responses to their secret question, the password reset functionality is disabled. If this happens, only the System Administrator can reset the customer's password by using the *Password Change eForm*. The *Password Change eForm* updates a customer's password for the Buyer, Analysis, and Sourcing applications.

Creating a Password Change eForm:

On the Buyer Dashboard:

1. From the *Create menu*, select *Password Change*
2. **Title:** Provide an appropriate title for the eForm following the agency standard titling convention
3. **Name**: From the dropdown box, search for and select the agency customer whose password needs to be reset
4. **Temporary Password:** Enter the customer's temporary password
5. **Comments:** Add any applicable comments
6. **Attachment:** Add any applicable attachment by clicking the *Add Attachment* button
7. Click *Submit*
8. Upon logging in with the newly established temporary password, the agency customer will be prompted to update their password

MFMP System Cleanup

The MFMP team recommends that all agencies perform an annual system cleanup effort to delete any unnecessary pending transactions. System Administrators should develop a list of requisitions in composing status and eQuotes in draft status that customers have no intention of completing. System Administrators may use the MFMP Secure Reports titled *PRs in Composing Status* and *Sourcing eQuote Event Activity* reports to develop these lists. This cleanup process will verify that old and outdated information is removed from the system. Appendix F contains a template to communicate with customers who need to clean up their requisitions in composing status and Appendix G contains a template to communicate with customers who need to clean up their eQuotes in draft status.

Monitoring Confidential Data

Agency customers are required to exclude confidential information from MFMP. This includes information in the comments field, line item description, and attachments. Incorporating confidential information within MFMP may violate section 119.071, Florida Statutes, as well as comparable federal regulations relating to confidentiality such as the Health Insurance Portability and Accountability Act (HIPAA).

System Administrators are required to annually submit their agencies' Confidential Information Policy to MFMP at MyFloridaMarketPlace@dms.MyFlorida.com by August 31. The policy's purpose is to state that the agency will not input confidential information within MFMP. The policy should also include the steps that the agency is using to monitor confidential information. See a sample Confidential Information Policy in Appendix C.

Tip: System Administrators should direct agency-specific questions about confidential information to their agency's security officer or General Counsel Office.

Confidential Information Examples

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, admissions 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

Useful Secure Reports

System Administrators can also access the following MFMP Secure Reports to assist their agencies in reviewing transactions that might contain confidential data:

- **IR 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)
- **Invoice Attachments by Commodity Code** – This report lists invoice reconciliations with an attachment linked to the Invoice 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)
- **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)

Refer to the Secure Reports Job Aid located on the MFMP University website to learn about other reports that may be useful.

Removing Confidential Information

Only the agency customer who originally attached a document or entered a comment into MFMP can delete their attachments and/or edit and delete their 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 should delete the attachment and attach a new document without the requisition approval process starting over.

To remove an attachment customers should:

- Locate the attachment that needs to be removed on the Summary tab of the transaction
- Click on the *Delete* button to remove the attachment

To edit or delete comments customers should:

- Locate the comment that needs to be edited or removed on the Summary tab of the transaction
- Click on the *Edit* or *Delete* link to update or remove the comment

The History tab provides an audit trail for edits and deletion of comments and attachments for orders, invoices, and invoice reconciliations. For more information about confidential information, customers should refer to their agency's confidential information policy.

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 their responsibilities without compromising security and confidentiality requirements. That includes adhering to the Generally Accepted Accounting Principles (GAAP) and segregation of duties. System Administrators should verify that a customer does not have multiple groups and roles that would adversely affect the segregation of duties within an approval flow. For example, an agency would not want an Invoice Manager to have the Requester group added to their profile. This would be a major conflict of interest because the Invoice Manager would have purchasing and payment permissions. To better translate, an individual would be able to request, receive, and act as the final approver for an invoice. See the section below to learn more on how System Administrators can monitor their agencies' groups and roles.

Agency Monitoring of MFMP System Groups/Roles

To monitor MFMP groups and roles, System Administrators can utilize two agency-specific weekly reports that provide a list of all MFMP accounts:

- **User Report** - Details all individuals within an agency that have an MFMP account
- **Users and Groups Report** - Details all individuals within an agency that have an MFMP account and includes their assigned groups/roles

The MFMP team generates these reports and posts them to the MFMP Secure Reports website. Refer to the Secure Reports Job Aid, located on the MFMP University website, to learn more about the available reports.

These reports are useful in assisting System Administrators in maintaining agency customers' MFMP accounts and can be used to complete a quarterly access review to verify that:

- All accounts are current
- No accounts have incompatible groups/roles
- Supervisor assignments are appropriate
- Management levels (spend authority) are accurate
- Ship To and Bill To information is accurate

To access the MFMP Secure Reports website, customers will need a username and password. All reports are posted to the site as zipped files. To view the data, customers will need a zip utility (WinZip, 7-Zip, etc.). Contact BuyerHelp@MyFloridaMarketPlace.com to request the agency's MFMP Secure Reports password.

Delegation of Approval Authority

When an agency customer does not setup a delegation of authority prior to an extended absence, the agency System Administrator can leverage the *Delegation of Authority eForm* to delegate approval authority, where appropriate. The eForm can also be leveraged during the [MFMP Customer Account Inactivation](#) process.

Important information regarding Delegation of Authority eForm functionality:

- System administrators can only delegate approval authority to customers within their agency (i.e. Entity/OLO)
- The delegator is the customer whose approval authority requires delegation
- The delgatee is the customer responsible for approving transactions on behalf of the delegator
- A delegation may not exceed six-months (180 days)
- An attempt to submit a *Delegation of Authority eForm* will be unsuccessful in the following situations:
    - An agency customer already has a delegation in place for the time period being selected on the eForm
    - A delegatee is selected whose authority is already being delegated to another customer during the time period being selected on the eForm
- If a new delegation is created via the *Delegation of Authority eForm* while a delegator's authority has already been delegated during the selected time, the Delegation of Authority eForm will override the existing delegation (i.e., the delegatee needs to be changed to another customer or delegation start or end date should be extended)
- There is no standard approval flow associated with the Delegation of Authority eForm, however the System Administrator may add approvers to this eForm as needed
- MFMP will generate an email notification to the Delegator, Delegatee, and the Delegator's system supervisor after the *Delegation of Authority eForm* is submitted and processed

How to use the *Delegation of Authority eForm*:

From the Buyer Dashboard:

1. Select *Delegation of Authority eForm* from the *Create* menu
2. **Delegator:** Select the name of the customer whose approval authority requires delegation
3. **Delegatee:** Select the name of the customer responsible for approving transactions on behalf of the delegator
4. **Delegation Start Date:** Enter the approval delegation begin date
5. **Delegation End Date:** Enter the approval delegation end date
6. **Delegation Reason:** Enter the reason for the delegation
7. Click the *Submit* button

Approval Flows

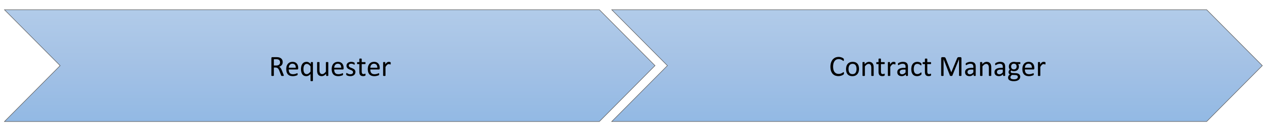
MyFloridaMarketPlace routes items based on the approval flows that the System Administrator and agency leadership have established. Agencies can create unique approval flows for requisitions, contract requests, invoice reconciliations, and requisition cancellations. Agencies can designate that certain commodity codes or object codes automatically add special approvers to an approval flow. For example, if an agency's Information Technology (IT) department is required to review all IT purchases, a special approver can be added to the agency's approval flow whenever an IT-related commodity code is listed on the requisition. Agencies can make changes to their current approval flow through the Approval Flow Update Process.

Standard Approval Flows

MyFloridaMarketPlace's standard approval flows provide agencies with normal levels of approval. The MFMP team recommends the all agencies, at the very least, implement the following standard approval flows:

Requisition Catalog and Non-Catalog Approval Flow

Contract Request Approval Flow



Invoice Reconciliation Approval Flow

**Special Approvers could be from the following departments: FCO, OCO, Fleet, or IT*
*** For service-based purchases*

Setting up Receiving Locations

In MFMP, agencies have two options on how to receive commodities: desktop or central. Desktop receiving requires that the original requester of the product completes the receipt. Central receiving requires a customer with an associated role to complete the receipt. Agencies with dedicated receiving locations (e.g., warehouses) typically use central receiving.

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 using the *Address Change eForm.* However, for central receiving, agencies must initially setup a central receiving address via an Operational Data Update (ODU). To set up a central receiving location, email BuyerHelp@MyFloridaMarketPlace.com and provide the relevant role and address.

The requester's MFMP profile determines the Ship To and Bill To addresses that automatically populate on the requisition. The requester can change this information by selecting a different *Ship To* and/or *Bill To* address on the requisition.

Updating receiving addresses:

On the Buyer Dashboard:

1. From the *Create* Menu, select *Address Change*
2. **Title:** Provide an appropriate title for the eForm following the agency standard titling convention
3. **Select Maintenance Mode:** From the dropdown box, select whether to add, update, or delete an address
4. **Address:** From the dropdown box, select an address; this option is available only if and address is being updated or deleted
5. Click the yellow *Next* button
6. On the Summary tab, if a new address is being added, the System Administrator will need to input the required address elements (Office name, address, city, phone number, etc...) This is where the System Administrator will also need to indicate whether they the location will be a *Bill To* or *Ship To* address. The system default is *Bill To*
7. Click the *Next* button
8. Review the summary information to verify that the correct changes were made
9. Click the *Submit* button

Requesting a central receiving role:

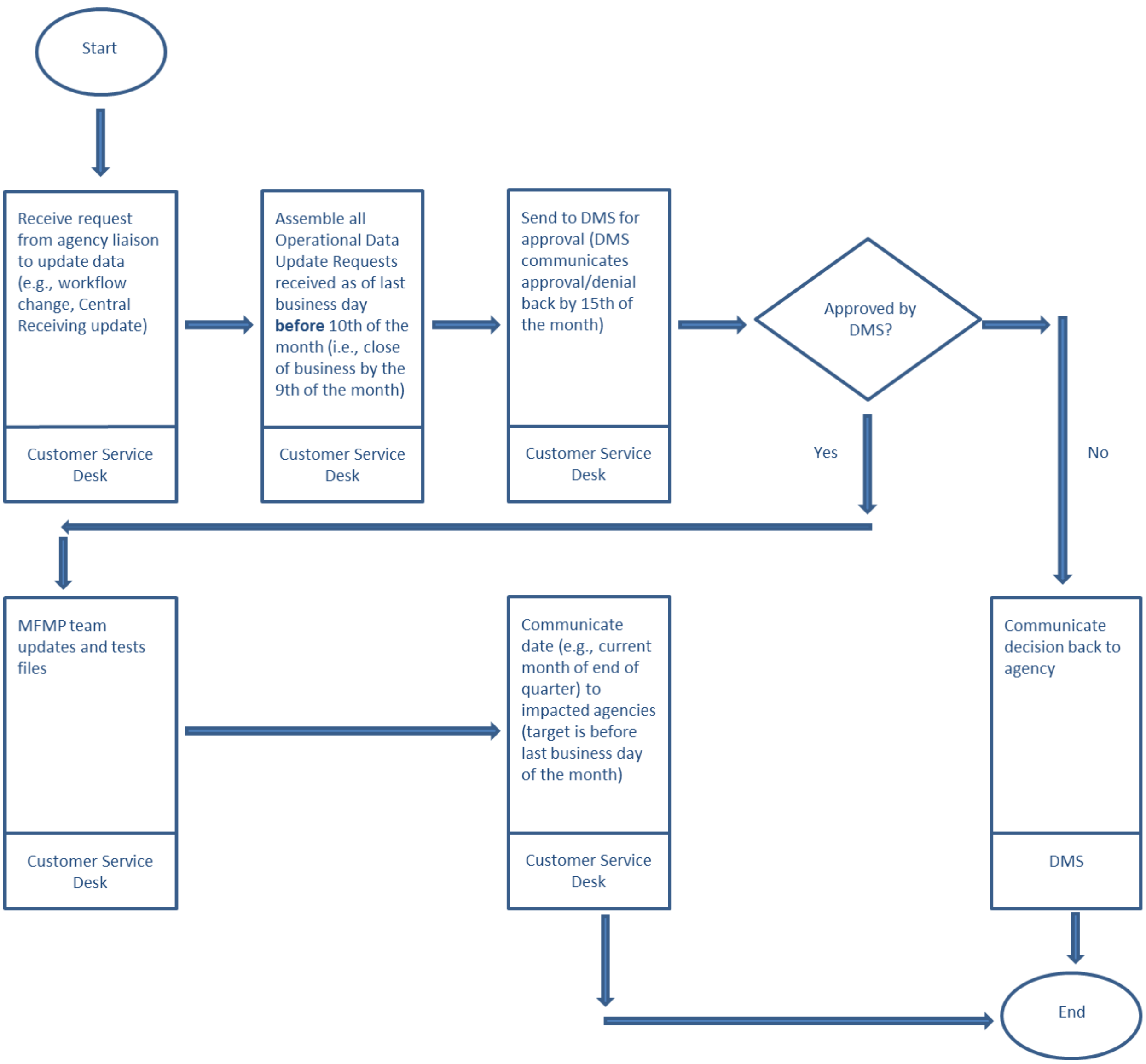
An agency must ask the MFMP team to create a specific central receiving role through the Approval Flow Update Process. System Administrators need to provide the *Unique Address ID* on the request. Please keep in mind that these changes do require a system update and MFMP cannot complete the request immediately. Once the role is established, the System Administrator can assign the role to the individuals who will receive for that location.

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

Approval Flow Update Process

To initiate an approval flow or central receiver update, System Administrators need to email their requests - referred to as Operational Data Requests (ODU) - to BuyerHelp@MyFloridaMarketPlace.com. Only the Agency's Purchasing Director or Finance and Accounting Director may approve an approval flow update request. The updates are made monthly and include updates related to central receiving files or approved additions of roles, resulting in new approval flows, for an agency. Please keep in mind that these changes do require a system update and MFMP cannot complete them immediately.

MFMP Operational Data Update Process

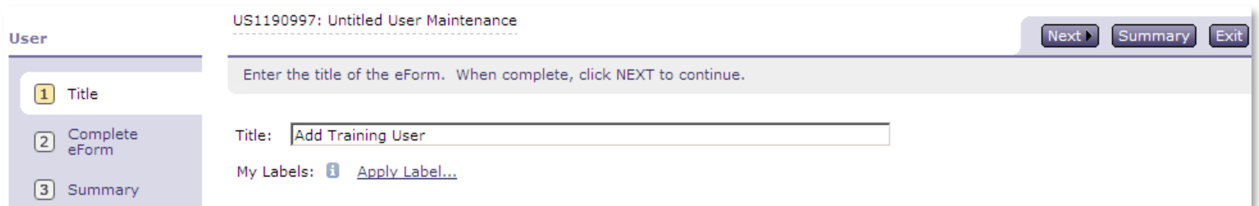


Creating New MFMP Accounts

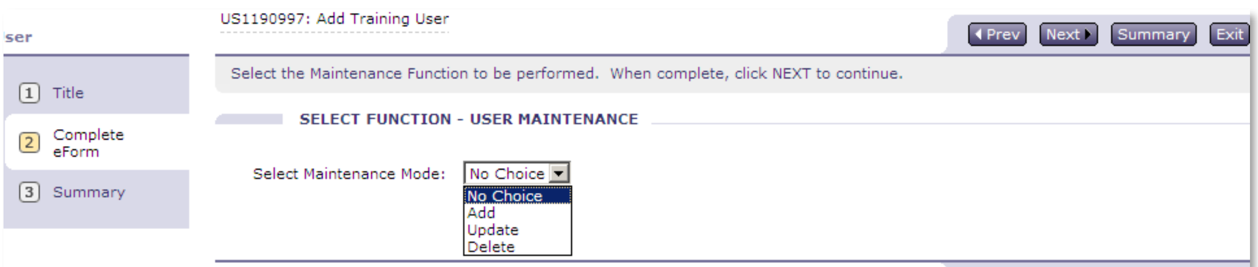
One of the main responsibilities of a System Administrator is creating new MFMP customer accounts. When granting access to different MFMP permissions, System Administrators should consider the customers' duties and responsibilities. Prior to new customers accessing MFMP applications, the MFMP team recommends that System Administrators establish training requirements. View the sample agency training welcome email in [Appendix D](). To establish a new MFMP account, System Administrators need to complete a *User Maintenance eForm*.

Completing a User Maintenance eForm:

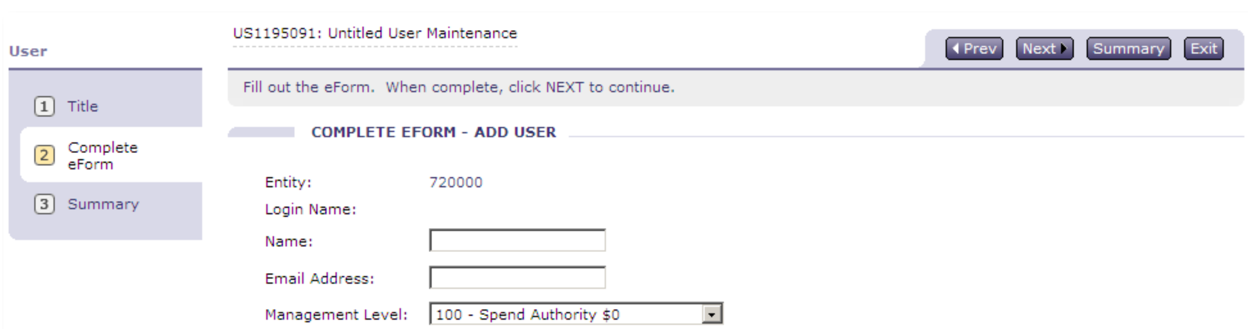
1. **Title:** Provide an appropriate title for the eForm following the agency standard titling convention. This is not a required field



2. **Select Maintenance Mode:** Indicate whether an account is being added, updated, or deleted

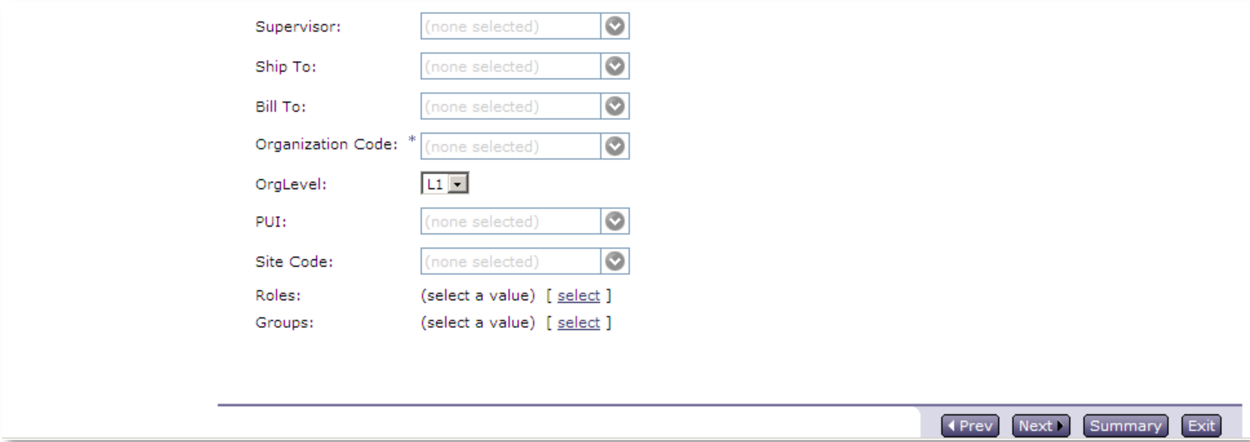


3. Complete the eForm with the fields discussed below. All fields containing asterisks are required



- **Entity*:** This field auto-populates based on the System Administrator's entity
- **Login Name:** This field will auto-populate once the email address is entered. It is the customer's username. It is typically the name in the email address before the @ symbol.
- **Name*:** Enter the MFMP account holder's first and last names

- **Email Address*:** MFMP uses this email address to notify the account holder when something requires approval. Also, all text before the @ symbol becomes the MFMP username (case sensitive). Although the email address can be changed, the customer's username will stay the same. This email address is also used for password resets
- **Management Level*:** Enter the customer's spend authority (the maximum level or amount this customer can spend/approve without supervisory approval). Management Levels are discussed in greater detail in the Management Level section



- **Supervisor*:** Enter the account holder's supervisor's name. When a transaction requires supervisory approval (e.g., purchases above the account holder's Management Level), MFMP will add the supervisor to the approval flow
- **Ship To***: Select the default location that will auto-populate on a requisition to identify where goods should be delivered
- **Bill To:** Select the default location that will auto-populate on a requisition to identify where the invoice should be delivered
- **Organization Code*:** Enter the default FLAIR organization code that will auto-populate when a requisition is created
- **OrgLevel:** Set the organization code spending parameters, this will prevent the customer from purchasing outside of their level. These levels follow FLAIR's organization code levels. For example, L1 enables a customer to purchase items from any organization code in the agency, while L5 restricts the customer to purchases to one organization code. To learn more, see the Organizational Codes and Levels section
- **PUI:** Enter the Purchasing Unit Identifier (PUI) number; requisitions and invoice reconciliations will follow this PUI's approval flow
- **Site Code:** Enter the FLAIR site code. This field will auto-populate on the requisition
- **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 transaction approval routing. For more information about groups and roles, refer to the Groups and Roles section

Tip: System Administrators need to create separate MFMP accounts if a customer is working with more than one FLAIR site code.

4. Confirm the changes and submit the eForm. The option to add an approver is optional
5. Once the account is created, the System Administrator needs to create a *Password Change eForm* to establish the customer's initial password

**The fields above are required when adding a customer.*

Tip: When creating a *User Maintenance eForm*, the selected Maintenance Mode (Add, Update, & Delete) can be changed by selecting *Title* in the left navigation panel and then clicking the *Next* button.

Understanding the Management Level

The Management Level represents the agency customer's spend authority. System Administrators are required to define a customer's spend authority when the new account is created. The system automatically sets this field to 100, which indicates that all new accounts have a default spend authority of $0.

If a customer creates a requisition for less than the amount identified in the Management Level field, the requisition will not require their supervisor's approval. If the requisition exceeds the Management Level, the requisition will require their supervisor's approval. The higher the Management Level, the higher the customer's spend authority (refer to table below). For example, a Management Level of 100 means that any requisition created would require a supervisor's approval.

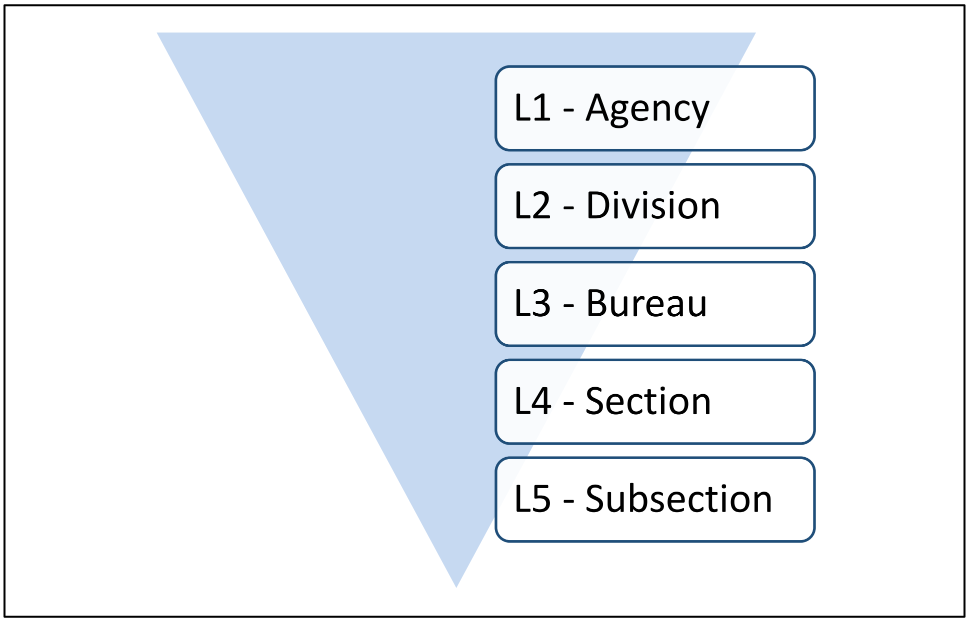
Only System Administrators can increase or decrease a customer's Management Level in the system. The MFMP team recommends, as a best practice, to mirror an agency customer's Management Level with their PCard spend authorization.

Management Level	Spend Authority	Management Level	Spend Authority
100	$0	15	$50,000
95	$250	13	$65,000
90	$500	12	$195,000
80	$1,000	11	$325,000
75	$1,500	10	$100,000
70	$2,000	9	$150,000
60	$2,500	8	$250,000
50	$5,000	7	$200,000
45	$7,500	6	$300,000
40	$10,000	5	$500,000
30	$15,000	4	$1,000,000
25	$20,000	3	$5,000,000
20	$25,000	2	$10,000,000
17	$35,000	1	$ 9,999,999,999

Organizational Codes and Levels

Organizational codes are 11-digit accounting codes that designate the organizational structure within an entity. These codes are divided into five different levels. System Administrators are responsible for selecting the correct level for their agency's customers based on their needs. For example, it is very rare that a customer needs permission to create requisitions for an entire agency (L1). For Finance and Accounting customers, System Administrators should verify that their MFMP and FLAIR organizational levels are the same.

- **L1 – Agency**: The highest level, allows agency customers to select any organization code within the agency (e.g.,72000000000)
- **L2 – Division within the agency**: Customers will be able to select any organization code that begins with the first four digits of the organization code in their profile (e.g.,72600000000)
- **L3 – Bureau within the agency:** Customers will be able to select any organization code that begins with the first six digits of the organization code in their profile (e.g.,72600700000)
- **L4 – Section within the agency:** Customers will be able to select any organization code that begins with the first eight digits of the organization code in their profile (e.g.,72600701000)
- **L5 – Subsection within the agency:** Customers will only be able to select the organization code listed in their profile (e.g.,72600701300)



Groups and Roles

Customers who perform the same functions within MFMP belong to the same group. A group controls the level of system access and what functions a customer can perform. For example, 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 state agencies. All MFMP customers can create an invoice (no groups are required).

Roles are used for approval routing purposes. Roles do not grant customers permission to perform actions in MFMP; they simply allow customers to approve or deny a transaction. All roles will begin with an agency's PUI; the only exception to the rule is for Central Receivers. For example, if an invoice manager is required to approve invoice reconciliations for an agency, the customer needs to have the Invoice Manager role that is a part of the agency's predefined IR approval flow, along with the Invoicing group, to access and approve the invoice reconciliation.

Group Definitions

The following table offers descriptions of all groups for each type of customer in MFMP. Descriptions of each group appear in the second column and the permission inheritance and eForm access will appear in the third and fourth columns respectively.

Groups	Description	Inherits*	eForm Access**
ABOI (Available Balance Override Indicator) Edit	Allows customers to edit the Available Balance Override Indicator (ABOI) on the Accounting Details page of a requisition or invoice reconciliation.		Invoice
ADA (Americans with Disabilities Act)	For customers with this group, the system removes some tables and scroll bars, which makes screen readers more effective.		Invoice
Analysis	Allows customers to access MFMP Analysis. Customers can run ad-hoc reports on historical transactions, and export reports into Excel.		Invoice
Buyer	This group does not give any permissions, only access to MFMP. Inactive customers should be given this group (along with Sourcing eQuote), without any roles.		
CO (Change Order) No Workflow	Allows customers to make changes to certain fields on a requisition without generating the approval flow. See Appendix B for all the fields that do not regenerate the approval flow.		Invoice
Contract	Allows customers to create and edit contract requests.	Edit Accounting	Invoice

		and Query Group	
Contract Exemption	Allows customers to create and edit a Contract Exemption eForm, which exempts a contract from the transaction fee.		Invoice and Contract Exemption
Contract Manager	Allows customers to create a contract request and create a Restore Contract eForm.	Edit Accounting and Query Group	Invoice and Restore Contract
DFS Auditor	Allows customers the ability to access and audit invoice reconciliations.		Invoice
Edit Accounting	Enables customers to edit all accounting fields. This group allows customers to edit more than just the Organization Code, Expansion Option, and Object Code. To edit accounting information on a requisition, a customer will also need to have the Requester or Purchasing group.		Invoice
FLAIR Maintenance	Allows customers to create a FLAIR Maintenance eForm. Invoice managers, customers with Release Encumbrance eForm Access, and the single agency encumbrance account must have this FLAIR Maintenance group.		Invoice, and FLAIR Login Information eForm
Invoicing	Allows customers to reconcile, submit, approve, reject, and refer invoice reconciliations (IR). See Appendix A for a listing of the fields.	Edit Accounting	Invoice, Payment Update, Release Encumbrance, Delete Disbursement, IR Accounting Update, Restore PO Balance, and Restore Payment Amount
No Approver Emails	Prevents customers from receiving notifications for items awaiting approval. In lieu of the group, customers can also customize email notifications by updating their customer preferences.		Invoice
No Supervisor	Allows customers to have no supervisor assigned on the customer profile. If an approval is pending a customer with this group, the item will not escalate if it is overdue. Additionally, a requisition will not require management approval, no matter the cost, if a customer has the ‘No Supervisor’ group. Note: A customer must have a management level of 1 or $9,999,999,999 and the supervisor set at no value on their customer profile.		Invoice

No Watcher Emails	Prevents customers from receiving notifications for items pending their optional approval. Customers can also customize their email notifications by updating their customer preferences.		Invoice
PO Not Sent	Allows customers to indicate when a purchase order (PO) should not be sent to a vendor.		Invoice
Purchasing	Customers in this group can edit and approve requisitions. They can also generate a contract request.	PO Not Sent	Invoice and Cancel Requisition
Query	Allows customers to perform system searches. Without this group, customers can search only for items that they have created or approved.		Invoice
Req Approver	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 give customers the ability to approve requisitions based on commodity codes and/or dollar thresholds. Members of this group cannot edit accounting information.		Invoice
Requester	Allows customers to create and submit requisitions.		Invoice and Cancel Requisition
Sourcing	This group allows customers to access and view electronic quotes in MFMP Sourcing.		
Sourcing eQuote	This group allows customers to complete electronic quotes (eQuotes) in MFMP Sourcing.		
System Admin	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. For security purpose, o*nly a limited number of customers per agency should belong to this group.*		Address Change, Password Update, User Maintenance, Invoice, Delegation of Authority
Transaction Fee Exempt	Customers in this group can exempt a requisition from the transaction fee (Rule 60A-1.032, Florida Administrative Code).		Invoice
Update Encumbrance	Allows customers to restore funds to an encumbered order. This might be necessary in specific cases such as when a warrant is cancelled or an encumbered disbursement fails Central FLAIR.		Update Encumbrance

**Inherits - Customers automatically gain the capabilities listed.*
***eForm Access - Customers have access to the listed MFMP eForm(s).*

Role Definitions

The following table lists standard roles available for customers in MFMP. Each role is assigned by PUI and will appear in the following format: *PUI: Role Title (e.g.,* 7200: FCO Approver).

Roles	
Budget Approver	**Management**
Budget Office	**Mobile Equipment Approver**
Cancellation Approver	**OCO (Operator Capital Outlay) Approver**
Central Receiver	**Personnel Approver**
Contract Exemption Approver	**Property Approver**
Contract Manager	**Purchasing Agent**
Contract Office	**Purchasing Agent Gatekeeper**
Contract Specialists	**Purchasing Director**
Deputy Secretary	**Purchasing Gatekeeper**
Equipment Leasing Approver	**Purchasing Office**
Exception Handler	**Quality Assurance Approver**
Executive Approver	**Reprographics Approver**
FA (Financial Approver) Approver	**Security Approver**
FCO (Fixed Capital Outlay) Approver	**Service Approver**
Fleet Approver	**Special Approver**
Fleet Reviewer	**Statewide Fleet Approver**
Insurance Approver	**Statewide Insurance Approver**
Invoice Gatekeeper	**System Administrator**
Invoice Manager	**Tallahassee Commodities Auditor**
IT Approver	**Tallahassee Contract Auditor**
IT Reviewer	**TCA (Temporary Cash Assistance) Approver**
IT Special Approver	**Telecommunications Approver**
Legal Approver	**Telecommunications Executive Approver**

Suggested Assignments of Groups/Roles for Types of Users

The following tables offer recommended groups and/or roles for each type of customer in MFMP. The type of customer will appear at the top of the table (e.g., System Administrator). The recommended groups will appear in the first column and potential roles will appear in the second column, if applicable. System Administrators should contact the MFMP Customer Service Desk at 866-352-3776 if they have questions about groups or roles.

> **Tip**: Give the Query group to all customers so they can search for requisitions, orders, receipts, invoices, or invoice reconciliations created by other customers.

System Administrators

Group	Role
Analysis	**PUI XXXX:** System Administrator
Query	

Sourcing	
System Administrator	

Finance and Accounting

Group	Role
Analysis	**PUI XXXX:** Exception Handler
ABOI Edit	**PUI XXXX:** Invoicing Gatekeeper
CO No Workflow	**PUI XXXX:** Invoice Manager
Edit Accounting	
FLAIR Maintenance	
Invoicing	

Purchasing

Group	Role
Analysis	**PUI XXXX:** Cancellation Approver
CO No Workflow	**PUI XXXX:** Contract Manager
Contract	**PUI XXXX:** Purchasing Gatekeeper
Contract Exemption	**PUI XXXX:** Purchasing Office
Contract Manager	**PUI XXXX:** Purchasing Agent
Edit Accounting	
Purchasing	
Query	
Transaction Fee Exempt	
Sourcing	
Sourcing eQuote	

Contract Manager

Group	Role
Contract	**PUI XXXX:** Contract Manager
Contract Exemption	
Contract Manager	

Requester

Group/Role	Role
Edit Accounting	Requesters do not require roles.
Query	
Requester	
PO Not Sent	
Sourcing	
Sourcing eQuote	

Requisition Approver

Group	Role
Req Approver	**PUI XXXX:** FCO Approver
Edit Accounting	**PUI XXXX:** FA Approver
Query	**PUI XXXX:** Legal Approver
Sourcing	**PUI XXXX:** OCO Approver (there are other roles a Requisition Approver might need based on agency preferences).

Viewing User Groups and Roles

System Administrators can view their agency customer's assigned groups and roles and all historical changes made to that customer's profile in MFMP. This feature may help System Administrators that desire to mirror new customers' profiles with another customer's profile.

Viewing a customer's profile changes:

1. Select *User Maintenance* from the drop-down search menu
2. Enter the name of the customer
3. System Administrators can view all versions of the *User Maintenance eForm.* To view the most recent groups and roles assigned to a customer, select the most recently created *User Maintenance eForm* on the list

> **Tip**: Filter the User Maintenance search by *Date Created* to achieve better results.

MFMP Customer Account Inactivation

System Administrators are responsible for maintaining MFMP account information for all customers with MFMP access. If an account needs to be inactivated (for example, an employee retires or transfers to another agency), the System Administrator is responsible for inactivating the customer's profile when they leave and making sure that all their roles are assigned to other customers, as needed. This is important when considering special approvers of specific commodity and object codes.

> **Tip**: If a customer is transferring to a different area within the same agency and still requires MFMP access, the MFMP team recommends inactivating the old account and establishing a new account for the new position.

Inactivating an account:

1. Change the account password to prevent the customer from accessing the system
2. Log in as the departing employee and provide screenshots of the following to the new customer responsible for open transactions:
    a. Approve Requests queue
    b. Open Order queue (found by clicking the Approved queue from the shortcut menu and grouping the queue by type)
    c. Reconcile Invoices queue
3. Click the *Composing* link on the shortcut menu and delete all transactions in composing status
4. Log in as the System Administrator and update the *User Maintenance eForm*:
    a. Place three X's in front of the customer's email address (e.g., XXXjohn.smith@myflorida.com) to indicate the email address is inactive
    b. Add the word "inactive" before the customer's name (e.g., Inactive-John Doe) in *Name* field
    c. Remove all roles and groups except for the Buyer and Sourcing eQuote groups
5. If the customer is a supervisor for other customers, use the *User Maintenance eForm* to select a different supervisor for the impacted customers.

    Note: You can verify whether the departing employee is listed as the supervisor for other customers by reviewing the *User and Groups report* available on the MFMP Secure Reports website.
6. Leverage the *Delegation of Authority eForm* to delegate the departing employee's approval authority to another customer. Once the System Administrator delegates the customer's approval authority, the delegatee can perform the following actions, as applicable:
    a. Approve/Deny requests that list the departing employee (either by name or a role) as a required approver
    b. Receive commodity orders (either by name or central receiving role)

Deleting an account:

After performing the activities discussed in the Account Inactivation section, System Administrators may delete a customer's account if the employee:

1. Acted as an Approver only
2. Does not have any requests in the following statuses:
    a. Composing
    b. Submitted
    c. Approved
    d. Ordering
    e. Ordered
    f. Canceling
    g. Receiving
3. Did not create a requisition *On Behalf Of* another customer

Delete the customer's account by using the *User Maintenance eForm* and selecting the *Delete* maintenance mode. Once a customer's account has been deleted, no one will be able conduct a system search for any transactions created *On Behalf Of* or *Prepared* by the departing employee.

Training

The MFMP team provides a variety of training opportunities for MFMP customers. Please note that these trainings should be used to ***supplement*** an agency's training program; agencies are responsible for training their own customers regarding their agency specific practices. The MFMP team recommends that when assigning groups/roles to an agency customer, the System Administrator makes sure that their customers receive the proper training.

MFMP offers several resources, available on the MFMP University website, to assist in developing an agency's training program. These include:

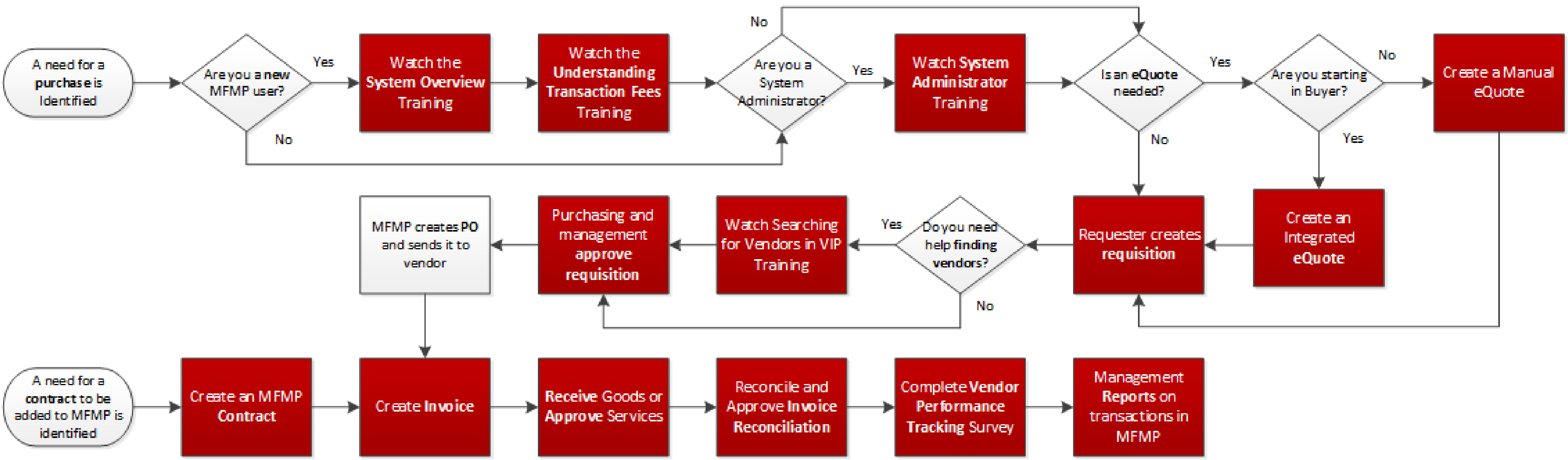
- **MFMP Course Catalog:** MFMP posts all MFMP training course materials in the MFMP University Course Catalog. The MFMP team will provide editable versions of these trainings if an agency wishes to use these materials when developing agency-specific training courses. System Administrators may email MFMP University at MFMPUniversity@dms.myflorida.com if they would like an editable version
- **Online Training:** MFMP provides a full suite of interactive self-paced online trainings. See the Procurement-to-Payment (P2P) process flow, including links to each individual online training on the following page
- **Job Aids and Manuals:** MFMP provides a list of training documents that provide MFMP guidance to agencies

MFMP also offers classroom training opportunities - including webinars and in-person training - in Tallahassee and throughout the state, when possible. For current availability, view the Agency Customer Training Registration webpage.

For assistance in developing agency specific trainings, please contact the MFMP team at MFMPUniversity@dms.myflorida.com.

MFMP Online Trainings

*Red boxes indicate that online trainings are available for that topic. Click the box to go to that training.



Training Recommendations

The MFMP University website offers several different Learning Paths based on the different types of transactions within MFMP. Each Learning Path contains a combination of training channels (interactive webinars, seminars, workshops, and MFMP University online trainings) based on system functionality.

MFMP Learning Path	Description
eQuotes	Training on electronic quotes (eQuotes) for goods and/or services submitted to vendors through MFMP Sourcing.
Requisitions/Purchase Orders	Training on creating purchases requests approving purchase requests, managing orders, receiving goods, and approving services in MFMP Buyer.
Contracts	Training on creating and managing MFMP contracts in MFMP Buyer.
Receipts	Training for requesters/OBOs and central receivers on how to complete receipts in MFMP Buyer.
Invoices/Invoice Reconciliations	Training for Finance & Accounting customers on creating and reconciling invoices in MFMP Buyer.
Reporting in MFMP	Training on system searches, Vendor Performance Tracking, Secure Reports, and creating custom reports in MFMP Analysis.
Training for System Administrators	Training for MFMP System Administrators
Vendor Bid System	Training for agency customers on the Vendor Bid System.

The MFMP team recommends customers in each functional role take the following online training(s):

MFMP Online Trainings	Requester	Supervisor	Purchasing	Finance & Accounting	System Administrator
MFMP System Overview	X	X	X	X	X
Creating Requisitions	X		X		X
Creating Integrated eQuotes	X		X		X
Creating Manual eQuotes	X		X		X
Approving Requisitions		X			X
Managing Orders	X	X		X	X
Receiving Goods and Approving Services	X				X
Creating Contracts	X	X	X		X
Managing Contracts	X	X	X		X
Creating Invoices	X			X	X
Reconciling & Approving Invoices				X	X
Reporting		X	X	X	X
Searching Catalogs in MFMP	X	X	X	X	X
Searching for Vendors in VIP	X		X	X	X
Vendor Performance Tracking	X		X	X	X
MFMP System Administrator					X

MFMP Training Environment

MyFloridaMarketPlace provides training environments for the MFMP Buyer and Sourcing applications, to help customers gain hands-on exposure to the system. The training environments provide a safe way for customers to test creating, approving, and receiving transactions in the system. When creating transactions within the training environments, it is important to keep the following key points in mind:

- Nothing created and/or altered in the training environments has any effect on work within the production environment
- The training environments do contain production transactional data; however, they are only updated monthly
- The username in the training environments is the same as a customer's username in production
- The default password for all customers in the training environments is *train30*
- Customers are unable to view attachments in the training environment
- While all catalogs are loaded, some vendors with Punchout catalogs may not maintain their test accounts; therefore, customers may not be able to access all punchout catalogs
- Vendors are unable to view eQuotes created in this environment
- Customers can create requisitions as encumbered or unencumbered. Encumbered orders receive encumbrance numbers and encumbrance line numbers via a FLAIR simulation
- Although FLAIR will appear in the approval flow, no transactions will be sent to FLAIR
- Invoice Reconciliations (IRs) will not go to *Paid* status unless the *Paid in FLAIR* box is checked
- The training environment is different than the production environment and customers may experience different performance (i.e., page to page response time) in the training environment
- The Buyer training environment is refreshed every second Thursday of the month. If an account is added to the production environment after the last monthly refresh, it will not be available in the training environment until the next month. However, if the customer needs immediate access to the application, the System Administrator does have the option to create a new customer account in the Buyer training environment

Access the training environments via the links on the MFMP University website or by clinking the appropriate logo below.

Appendices

Appendix A - Edit Accounting Fields

The table below contains the fields that are editable on a requisition when the requester has the Edit Accounting permission.

Edit Accounting Fields		
Agency Unique	**Expansion Option**	**Other Cost Accumulator**
Batch	**Ext Category**	**Payable**
BPIN (Beginning Property Item Number)	**External General Ledger**	**Payable Line Number**
Budget Entity	**External Object**	**Payable Number**
Category	**External Program**	**Product ID**
Category Year	**Final Payment Indicator**	**Project ID**
Certified Forward Indicator	**General Ledger**	**Quantity**
Contract	**Grant**	**State Program**
Contract Encumbrance Line Number	**Grant Year**	**Sub-Vendor**
Contract Encumbrance Number	**Grouping Character**	**Times**
Contract Year	**Int Budget Indicator**	**Unit**
Count	**Object Code**	
Description	**Organization Code**	

Appendix B - CO No Workflow Fields

The table below contains the fields that are editable on a Change Order (CO) that, when the requester has the CO No Workflow permission, does not generate an approval flow.

CO No Workflow Fields		
Advanced Payment Indicator	Encumbrance Gen Led	Opt Version
Agency Unique	Expansion Opt	Organization Code
Available Balance Override Indicator	Ext Category	Other Cost Accum
Batch	Ext Gen Led	PO End Date
Budget Entity	Ext Object	PO Start Date
Carry Forward	External Program	Prior Period Indicator
Category	Fiscal Year	Product ID
Category Year	Gen Led	Project ID
Contract	Grant	PUI
Contract Year	Grant Year	State Program - Standard
Count	Int Budget Ind	Sub-Vendor
Description (Split Accounting description)	Line item description	
Encumbrance Ext Gen Led	Object Code	

Appendix C - Sample Confidential Information Policy

Due to the sensitive nature of the information that may be transmitted in MyFloridaMarketPlace, the MFMP team recommends that each agency adopt a confidential information policy. System Administrators can utilize this sample policy to customize a unique policy for their 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 customers 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
B. **MFMP**: MyFloridaMarketPlace – State of Florida's electronic procurement system
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 on the MyFloridaMarketPlace website.

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

Monthly, 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 website).*

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 customer roles based on the stated job responsibilities. Limit roles with ‘Query’ 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 System Administrators with creating policies based on their agency standards.

Appendix D - Sample New MFMP Customer Welcome Email

Welcome To MyFloridaMarketPlace!

MyFloridaMarketPlace (MFMP) is a source for centralized procurement activities, streamlining interactions between vendors and state government entities, and providing tools to support innovative procurement for the State of Florida. MyFloridaMarketPlace uses several applications to manage the entire procure-to-pay process.

If this is your **first time using MFMP**, please take the MFMP System Overview Online Training. **Next**, you should take MFMP training that is relevant to your role in the system. The MFMP U team offers in-person trainings, register for these on the MFMP University website. MFMP also offers a full suite of online trainings that will guide you through the steps needed to create orders, pay invoices, and other types of actions need in MFMP. Please watch the trainings that match your position's role or responsibility in MFMP (e.g., If you are creating requisitions in MFMP, you should watch Creating Requisitions).

For step-by-step instructions on how to use MFMP, please view the MFMP Buyer manual and/or any of the detailed job aids available on the MFMP University website.

Additional information and resources can be found on the MFMP website to assist you within MFMP.

MFMP Application Links:

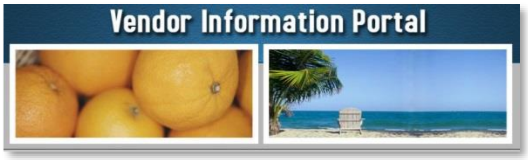
Use the links below to access the MFMP applications. The MFMP team recommends saving these links to your internet browser's favorites list for easy access.

Please note that when accessing MFMP with an Internet Explorer browser version 9 or higher, you must put your browser in compatibility mode. View this job aid for steps on how to complete this easy process.

MFMP Buyer – This MFMP application is used for all purchasing and invoicing activities.

MFMP Sourcing – This MFMP application provides an automated way to create, launch, manage, evaluate, and award solicitations for goods and services.

MFMP Analysis – This MFMP application provides the ability to build analytical reports using several different sources of information.



Vendor Information Portal (The username and password is *publicuser*. Enter in lower case.) – This MFMP application provides Florida's vendors with self-service tools for registration, account maintenance, performance rating reviews (VPT), and transaction fee reporting.

Additional Helpful Links:

State Contracts and Agreements
[*Enter Agency Specific Links as desired*]

MFMP Contact Information:

You can reach our team via phone at 866-352-3776 or via email to BuyerHelp@MyFloridaMarketPlace.com. The Customer Service Desk is open Monday – Friday from 8:00 am to 6:00 pm ET.

Appendix E – Sample MFMP New Account Email*

Welcome to MyFloridaMarketPlace (MFMP)!

Your Agency MFMP System Administrator created an MFMP account for you.

What's MFMP?

MFMP is the State of Florida's award-winning eProcurement system used to:

Create requisitions and purchase orders

Receive goods and services

Reconcile invoices

Next Steps:

Take the System Overview online training

Create a password and choose security questions

View and register for live training opportunities

Contact us

If you have any questions, we are here to help. Contact the MFMP Customer Service Desk Monday - Friday from 8 a.m. - 6 p.m. ET.

866-352-3776

BuyerHelp@MyFloridaMarketPlace.com

Thank you,

MyFloridaMarketPlace Team
Division of State Purchasing, MyFloridaMarketPlace
866-352-3776 (toll-free)
Florida Department of Management Services
We Serve Those Who Serve Florida

DMS

**Customers will receive this email once their accounts are established within MFMP.*

Appendix F - Requisition Cleanup Communication Template

Good morning/afternoon,

[Your Agency Name] has identified numerous Purchase Requisitions (PRs) in MFMP Buyer that are in *composing* status. Please review the attached spreadsheet to see if you have any PRs that have been identified. [Your Agency Name] is requesting that all MFMP customers review and delete any PR in *composing* status that is no longer needed and will not be submitted for approval. You can follow the quick steps below to delete the PR from your MFMP queue:

1. Login to MFMP Buyer
2. Locate your *My Documents* queue from the *Home* tab
3. Click on the applicable PR in composing status
4. Choose to edit, submit, or delete the PR

Please have this completed no later than [Insert Due Date]. Please let me know if you have any questions or concerns.

Thank you!

Appendix G - eQuote Cleanup Communication Template

Good morning/afternoon,

[Your agency] has identified numerous eQuotes in MFMP Sourcing that are in *draft* status. Please review the attached spreadsheet to see if you have any eQuotes that have been identified. [Your Agency] is requesting that all MFMP customers to review and delete any eQuotes in *draft* status that are no longer needed and will not be published. You can follow the quick steps below to delete the eQuote from your MFMP queue:

1. Login to MFMP Sourcing
2. Select *Event* on the Search menu
3. Select *eQuote* as the Event Type, *Draft* as the Status, and your *username* as the Owner
4. Click the title of the eQuote and clicking *View details*
5. Click the *Actions* button and click *Delete*
6. Click the *Delete* button

Please have this completed no later than [Insert Due Date]. Please let me know if you have any questions or concerns.

Thank you!

MFMP System Administrator Glossary

Accounting Verification Exception - Generates for all Invoice Reconciliation (IR) documents. This exception is a reminder to verify that the accounting information for each line item associated with the invoice is correct prior to approving payment.

Agency - Any state offices, departments, divisions, and bureaus 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. This is also known as the 'OLO' in FLAIR.

Amount Variance Exception - A header level exception that occurs when the total cost of the invoice is greater than the total cost of the purchase.

Approval Authority - Authority to approve requests. (See also Delegated Approval Authority)

Approvable - A transaction that requires approval from designated personnel in the MFMP system before customers take any further action.

Approval flow - Specifies a group of customers (by either name or role) that are expected to review a transaction prior to its acceptance in MFMP. Customers can view the approval flow in the MFMP system.

Approver - A customer with the authority to approve a transaction that is active in his or her approval To Do portlet. In many cases, agencies require a set of approvers with different levels of approval authority to approve a transaction, as outlined in the approval flow.

Ariba Network (AN) – The system vendors use to electronically receive purchase orders and submit eInvoices to agencies through MFMP.

Available Balance – 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 select to override the automatic system check of this file by selecting the Available Balance Override Indicator (ABOI).

Auto Reject Amount Variance Exception - A header-level exception that occurs when the total cost of the invoice is greater than the total cost of the purchase order. By default, if MFMP finds this type of exception, it auto-rejects the invoice.

Bill To Address - Address Buyer designates while creating the requisition to receive the invoice.

Browse - The act of searching for an attachment to include in MFMP.

Buyer - Anyone who requisitions or processes a purchase order or invoice for goods and services through MFMP.

Catalog - An organized descriptive list of goods or services on state term contracts available to potential buyers. MFMP uses line item catalogs and punchout catalogs. (See also separate entries for each catalog type)

Central Receiver - Customer(s) identified to receive goods shipped to an agency's central receiving address.

Certified Business Enterprise (CBE) - Vendor that meets that state's requirements to be a certified business enterprise by the Florida Office of Supplier Diversity. These vendors have designated codes to identify their minority status in MFMP and MFMP customers can view them.

Change Order - Changes an existing purchase order, by making changes to the requisition.

Commodity - An item of physical property customers order and vendors deliver. This is also known as a good.

Commodity Code - A system of numbers (with descriptions) designed to identify and list commodities or services by categories and classes in MFMP.

Confidential Information - Information exempt from public records requirements under state or federal statutes.

Contract - A formal agreement set up electronically in MFMP.

Dashboard - The MFMP home page that customers customize for their work needs.

Delay Purchase Until - Requisitions created with a Delay Purchase Until date proceed through the approval flow and MFMP holds them until the specified date; on that date, MFMP releases them to FLAIR (if encumbered) and the vendor.

Delegated Approval Authority - Authority to approve requests on behalf of the original approver, only when designated. (See also Approval Authority)

Delegatee - Someone with 'delegated approval' authority on behalf of another customer. The delegate receives and approves requisitions and invoice reconciliations for the original customer.

Delegator - Customer who assigns approval authority to another customer.

Desktop Receiving - Original requester responsible for completing the receipt when agency receives purchases.

eForm - An electronic form.

Encumbrance - The number associated to a request to reserve funds for a purchase in FLAIR, the state's financial system. Customers can automatically mark a requisition to encumber funds through MFMP and FLAIR. Customers can pay MFMP or FLAIR encumbrances through MFMP.

eProcurement - Applies eCommerce technology to streamline the purchasing process; integrates customer and vendor business processes.

eQuote - Electronic quotation for goods and/or services submitted to vendors who respond electronically.

Exception - Variances between the purchase order, receipt (if applicable), and the invoice reconciliation including Amount Variance Exception, Accounting Verification Exception, etc. Agencies must accept or reconcile these exceptions to process invoice reconciliations.

Exception Handler - The first Finance and Accounting approver for an Invoice Reconciliation that is responsible for reconciling all exceptions.

Groups – Categories of permissions assigned by the agency system administrator 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 itemizing the goods and/or services the vendor provided, associated costs, and the total costs.

Invoice Manger - The final agency approver for an IR.

Invoice Reconciliation (IR) - When a customer submits an Invoice in MFMP or a vendor submits an electronic invoice (eInvoice), MFMP creates invoice reconciliations (IR). IRs displays all exceptions (differences between the order, invoice, and receipt if applicable) that must be reconciled before the IR is approved for payment. IRs can be submitted to FLAIR for disbursement requests.

IR Sequence Number - The numbers that appear after the dash (-) in the IR number, for example, in IR1100140684-1526335 the IR sequence number is 1526335.

Line Item - One item on an order, regardless of quantity.

Line Item Catalog - MFMP enters state term contracts in the system as searchable line items. MFMP populates Line Item Catalogs with the supplier location, vendor name, commodity code, and unit price and part number if applicable. Customers select line items for their requisitions.

Log Out Warning - When a customer's session has been idle for 29 minutes, a Logout Warning popup, with a countdown of 60 seconds appears on the screen.

Menu Bar - Provides direct access for the customer to open the home page, log out, preferences, tips, currency, and online help; located at the top of the screen.

Method of Procurement (MOP) - Indicates the statutory authority a customer is using to make a purchase.

MyFloridaMarketPlace (MFMP) - The State of Florida eProcurement program represented by four main applications: Buyer, Sourcing, Analysis, and the Vendor Information Portal (VIP).

Need By Date - Date when the customer needs to receive an item or services from the vendor.

Non-catalog Item - An item not listed in a line item catalog or a Punchout catalog. The customer manually enters the detail information for the desired item.

On Behalf Of (OBO) - Requesters can specify if they are creating a requisition on behalf of another user. The OBO will be responsible for receiving goods for the order or approving the IR for services.

Parallel Approver - Approvers that receive the same transaction simultaneously. The transaction cannot fully process until all the approvers approve it.

Preparer - Customer who created a requisition On Behalf Of another customer; the On Behalf Of customer is the Requester.

Price Variance Exception - Exception that occurs when the price on the invoice line item is different from the price on the purchase order line item.

Purchasing Unit Identifier (PUI) - Number that identifies the customer's purchasing unit and defaults based on the requester's profile. MFMP uses the PUI for transaction routing purposes.

Punchout Catalog - Customers punchout from MFMP to a vendor website to purchase items directly; items then populate in line item form on the MFMP requisition.

Purchasing Card (PCard) - A State of Florida bank card issued to state employees for the payment of commodities and services. Agencies identify requisitions they wish to pay with a PCard.

Purchase Order (PO) - Created when a requisition completes the approval process in MFMP. MyFloridaMarketPlace sends POs to the chosen supplier by fax, email, or through the vendor's ASN account (depending on the vendor's preferred method). Encumbered orders generate an alphanumeric PO number and unencumbered orders generate a PO number.

Quantity Variance Exception - Exception that occurs when the quantity on the invoice line item is different from the quantity left to invoice on the purchase order line item.

Receipt - Electronic receiving report the requester or On Behalf of completes when he or she receives the commodity on a purchase order. (Complete receipts in compliance with section 215.422, Florida Statutes.)

Received Quantity Variance Exception - Exception that occurs when the quantity field on the invoice line item is different from the quantity left to invoice on the receipt line item.

Reconcile - Resolving exceptions contained on the invoice reconciliation (IR). The On Behalf Of is also responsible for reconciling IRs for services in order to verify that services were rendered.

Redact - To obscure or remove confidential information before scanning and attaching a document into MFMP.

Release - Purchase order created against an MFMP Contract to notify a vendor to ship products or services as designated on the contract.

Requester - Customer designated in the On Behalf Of field on a requisition who establishes the need for procuring goods or services.

Requisition (PR) - A request to identify a need to procure a commodity and/or service. Once the requisition completes the approval process, MFMP generates a PO and transmits it to the vendor.

Requisition Number - Unique identifying number MFMP assigns to each requisition.

Roles - PUI-specific assignment used for routing purposes in the approved workflow. Customers may have no roles or multiple roles based upon their responsibilities. Roles do not provide any access and groups are used for assigning permissions.

Services - Work a vendor provides that does not include the manufacturing or delivery of goods.

Session - A single period of time a customer logs in to use the MFMP system. A customer's session will time-out after 30 minutes of inactivity. See also Log Out Warning

Ship To Address - The physical address set up to identify where vendors deliver commodities and/or provide services.

Sourcing - Electronic application used to develop and manage both strategic sourcing procurements (RFI, RFP, RFQ, ITB, and ITN) and electronic quotes (eQuotes).

Split Accounting - Allows customers to split the cost of a line between different accounts, organizations, and/or funds. At the line item level, customers can specify a split for the charge across multiple accounts by percentage, quantity, or total amount.

Transaction Fee - Effective July 1, 2003, the state instituted, through Rule 60A-1, Florida Administrative Code, a transaction fee for procurement transactions to provide funding for state-of-the-art purchasing tools and technology.

Two-way Match - Process by which MFMP matches the purchase order and invoice to check for variances in quantity or amount, and applies to all orders for services.

Three-way Match - Process by which the system matches the purchase order, receipt, and invoice to check for variances in quantity or amount. This applies to all orders for commodities.

Unmatched Invoice - Exception that occurs when MFMP is unable to match a purchase order to the eInvoice. These IR's are rejected on the agency's behalf. Agencies can coordinate with vendors to receive the invoice with an adequate purchase order.

Unmatched Line Item - Exception that occurs when the vendor or agency customer creates eInvoices or Invoices against an unknown line number of the purchase order.

User Profile - Specific customer's MFMP preferences and settings, in addition to roles and groups in the system.

Vendor - Businesses registered with MFMP to conduct business with the State of Florida and its entities.

Watcher (Optional Approver) - Customer the agency added to an approval flow to monitor a transaction, but without authority to approve or deny.

MFMP Resources

Customer Service Desk (CSD)

Contact the MFMP CSD at BuyerHelp@MyFloridaMarketPlace.com, 866-352-3776, or using the Customer Assistance Request (CAR) Form for assistance with MFMP.

For password resets, customers should use the password reset functionality or contact their agency's System Administrator. *Please note that the password synchronization between MFMP Buyer and MFMP Sourcing happens twice a day, once at 6:45 PM and once at 12:45 PM.*

MFMP Buyer

https://Buyer.MyFloridaMarketPlace.com/

MFMP Analysis

http://Analysis.MyFloridaMarketPlace.com/

MFMP Sourcing

https://Sourcing.MyFloridaMarketPlace.com/Sourcing/Main?System&passwordadapter=PasswordAdapter1

MFMP Website

- Main website: http://www.dms.myflorida.com/mfmp/agencycustomers
- Meeting materials: http://www.dms.myflorida.com/mfmp/agencycustomer/meetingmaterials
- Manuals and Job Aids: http://www.dms.myflorida.com/mfmp/jobaids

MFMP University

- Training Registration: http://www.dms.myflorida.com/mfmp/agencycustomer/registration
- Exclusive MFMP online training: http://www.dms.myflorida.com/mfmp_buyer_tours
- Training materials: http://www.dms.myflorida.com/mfmp/university/catalog

Vendor Searches

- Vendor Information Portal: https://Vendor.MyFloridaMarketPlace.com/
- Username and password: *publicuser*