MFMP System Administrator Manual

June 2016

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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.

System Administrator Responsibilities

Each of these responsibilities listed below are defined in greater detail in subsequent sections.

- Work with your agency's Purchasing and Finance and Accounting Liaisons
- Submit your agency's annual confidential information policy
- Actively participate in MFMP sponsored meetings and events
- 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, unless done by your agency's Purchasing or Finance and Accounting Liaisons.

> **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
- Distribute MFMP communications within your agency

MFMP Communication and Meeting Matrix

The following table outlines planned communication events. The communication matrix includes communication topics, objectives, form, audience, and frequency.

Topic	Audience	Form	Frequency
Change Review Board (CRB)	CRB members (designated agency representatives)	Meeting	Quarterly
Commodity Code Annual Update	Purchasing Directors	Email	Annually
Customer Round Table (CRT)	State agency Purchasing and F&A liaisons	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, News feed, CSD signatures	As needed
Inside MFMP U	System Admin and Liaisons	MFMP U	Quarterly
Known Issues	Agency purchasing and F&A liaisons	Email	Monthly
Maintenance Windows	Agency purchasing and F&A liaisons	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	Agency purchasing and F&A liaisons	Email	Weekly
Release Notes	Agency purchasing and F&A liaisons	Email, DMS website	Every other month
Survey for Resolved CSD Tickets	Applicable state agencies and vendors	Email	Daily
Training	State agencies and vendors	MFMP U	Varies by course
Unmatched Invoices	Impacted state agencies	Email	Daily
Utilization Scorecard	DMS Leadership, state agency leadership	Email	Quarterly
Vendor Inactivations and Vendors with Invalid Data	State agency purchasing and F&A liaisons	Email	Weekly

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 C includes a sample policy.

Direct agency-specific questions about confidential information to your agency's 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. 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).

2. 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).

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).

Refer to the Secure Reports job aid located on the MFMP website to learn about other secure reports that may be useful.

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.

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

> _Steps to Success_: Removing attachments
> - 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.

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.

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

- **Training presentations:** MFMP posts all MFMP training course materials in the MFMP University Course Catalog; we encourage agencies to use these materials when developing agency-specific training courses.
- **Online training:** Interactive self-paced web based training.
- **MFMP Training Environment:** An environment that simulates the MFMP production environment. It does not deliver purchase orders to vendors, encumber funds or post payments in FLAIR.
- **Job Aids and Manuals:** Documents that provide guidance on using MFMP.

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

MFMP also offers several training channels, including webinars, self-paced online trainings, 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 on the MFMP website.
- **Seminars and Workshops** provide face-to-face training. Workshops include hands on work in MFMP. Find registration and training materials on the MFMP website.
- **MFMP Online Trainings** are recorded training sessions of various MFMP functions. Each key system functionality in the Source-to-Pay process is covered by an online training. See the process flow below for links to each relevant training.

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

```
A need for a
purchase is
Identified
      │
      ▼
  New MFMP     ──Yes──▶  Watch the      ──▶  Are you a   ──Yes──▶  Watch System    ──▶  Is an eQuote  ──Yes──▶  Create an
  user?                  System               System Admin?        Administrator         needed?                 eQuote
      │                  Overview                  ▲               Training                  │                      │
      No                 Training                  │                              No─────────┘                      │
      │                      │                     │                                         │                      │
      └─────────No───────────┘─────────────────────┘                                         ▼                      │
                                                                                                                    │
  MFMP creates  ◀──  Purchasing and  ◀──  Watch         ◀──Yes──  Trouble          ◀────  Requester  ◀──────────────┘
  PO and sends       management            Searching for           finding                initiates
  it to vendor       approve               Vendors in VIP          vendors?                requisition
      │              requisition           Training                   │
      │                   ▲                                           No
      ▼                   └───────────────────────────────────────────┘
```

```
A need for a
contract to be   ──▶  Create an    ──▶  Create Invoice  ──▶  Receive Goods  ──▶  Reconcile and    ──▶  Complete        ──▶  Management
added to MFMP         MFMP Contract                          or Approve          Approve Invoice        Vendor               Reports on
is identified                                                Services            Reconciliation         Performance          transactions in
                                                                                                        Tracking Survey      MFMP
```

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management SERVICES
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Training Recommendations

DMS recommends customers in each role attend the following classes:

	Requester	Supervisor	Purchasing	Finance & Accounting	System Administrator
System Overview	X	X	X	X	X
System Administrator					X
Reporting		X	X	X	X
Creating a Requisition	X		X		X
Invoice	X			X	X
Approving Requisitions		X			X
Understanding the Transaction Fees			X	X	X
Reconciling/Approving IRs				X	X
Receiving	X				X
eQuote	X		X		X

MFMP Training Environment

DMS established the training environment for every MFMP application 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.

Access the training environments via the links on the MFMP website or by linking the appropriate logo below. MFMP users use the same username that they use in the "live" production environments to access the training environments and the password is train30. Any new customer accounts added by the agency's System Administrator after the last monthly refresh will not be available in the training environment until the next month, but a System Administrator can add them by creating a new user profile in the training environment.

Creating Transactions in the Training Environment

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

- Nothing created and/or altered in the training environment has any effect on work within the production environment.
- The username in the training environment is the same as a customer's user name in production.
- The default password for all customers in the training environment is train30.
- You 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, you may not be able to "punch-out" to their site.
- Customers may create eQuotes in this environment (there will be no supplier responses to award).
- You can create requisitions as encumbered or unencumbered. Encumbered orders receive encumbrance numbers and encumbrance line numbers via a FLAIR simulation.
- Even though FLAIR will be in the approval flow, no transactions are sent to FLAIR.
- Invoice Reconciliations (IRs) do not go to 'Paid' status unless the "Paid in FLAIR' box is checked.
- 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:
- User Report - Details all individuals within your agency with an MFMP account.
- 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 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 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 Secure Report website, email BuyerHelp@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 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. Agency System Administrators can also reset their customers' passwords.

If customers choose to reset their own passwords, they will receive a "Password Reset Instructions" email. This email 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.

Steps to Success: Resetting passwords
1. Enter your User Name and answer your secret question (remember it is case sensitive).
2. Enter your User Name. Once submitted, MFMP delivers password reset guidance to the email address on file in your user profile.
3. Click the link in the password reset guidance email.
4. 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.

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

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) by using the password change eForm.

In MFMP, customers with the System Administrator group are able to create a Password Change eForm. Completing a Password Change eForm will update an agency customer's MFMP, Analysis, and Sourcing/eQuote passwords.

_Steps to Success_: Creating a password change eForm
From your Dashboard:
1. Select Password Change from your Create menu.
2. Enter an appropriate title for the eForm.
   a. This may follow an agency specific titling convention.
3. Select the agency customer whose password is to be reset.
   a. Do this by selecting 'Search for More' from the drop down menu in the 'Name' field.
4. Enter the updated password in the 'Temporary Password' field.
5. Add any necessary comments or attachments.
6. Click Submit. Upon logging in with the newly established temporary password, the agency customer will be prompted to update their password.
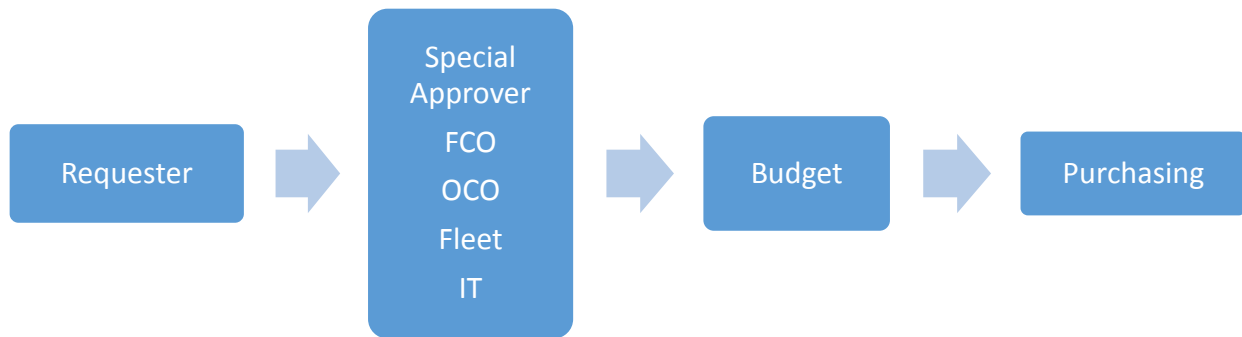
Workflow

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 (Information Technology) 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 FCO OCO Fleet IT | → | Budget | → | Purchasing |
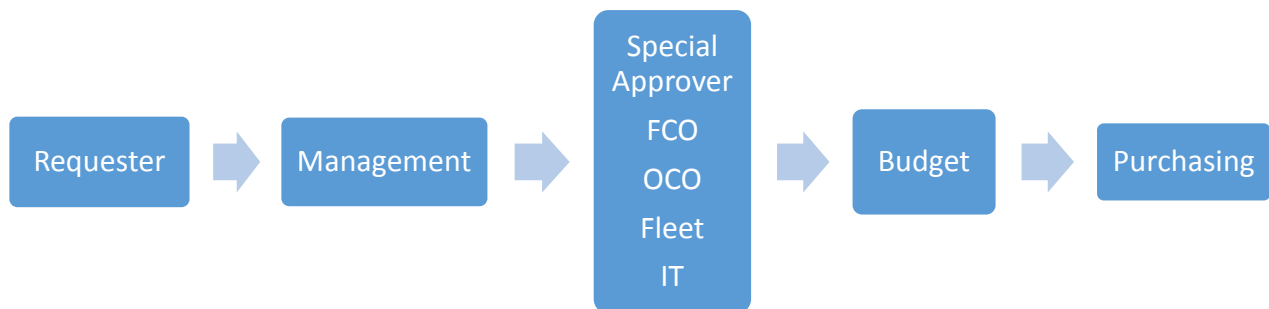
Contract Request Approval Flow

```
┌──────────┐      ┌──────────┐      ┌──────────┐      ┌──────────┐
│          │      │ Special  │      │          │      │          │
│          │      │ Approver │      │          │      │          │
│          │  →   │   FCO    │  →   │  Budget  │  →   │Purchasing│
│ Requester│      │   OCO    │      │          │      │          │
│          │      │  Fleet   │      │          │      │          │
│          │      │   IT     │      │          │      │          │
└──────────┘      └──────────┘      └──────────┘      └──────────┘
```

Invoice Reconciliation Approval Flow

```
┌──────────────┐      ┌──────────┐      ┌────────────────┐
│ Requester/OBO│      │ Exception│      │                │
│ (For         │  →   │ Handler  │  →   │ Invoice Manager│
│ services only)│     │          │      │                │
└──────────────┘      └──────────┘      └────────────────┘
```

Agencies can make changes to the current workflow through the workflow update process. To begin the workflow process, email BuyerHelp@MyFloridaMarketPlace.com. Please keep in mind that these changes do require system updates 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.

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:

Steps to Success: Updating addresses
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.
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.
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 workflow 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.
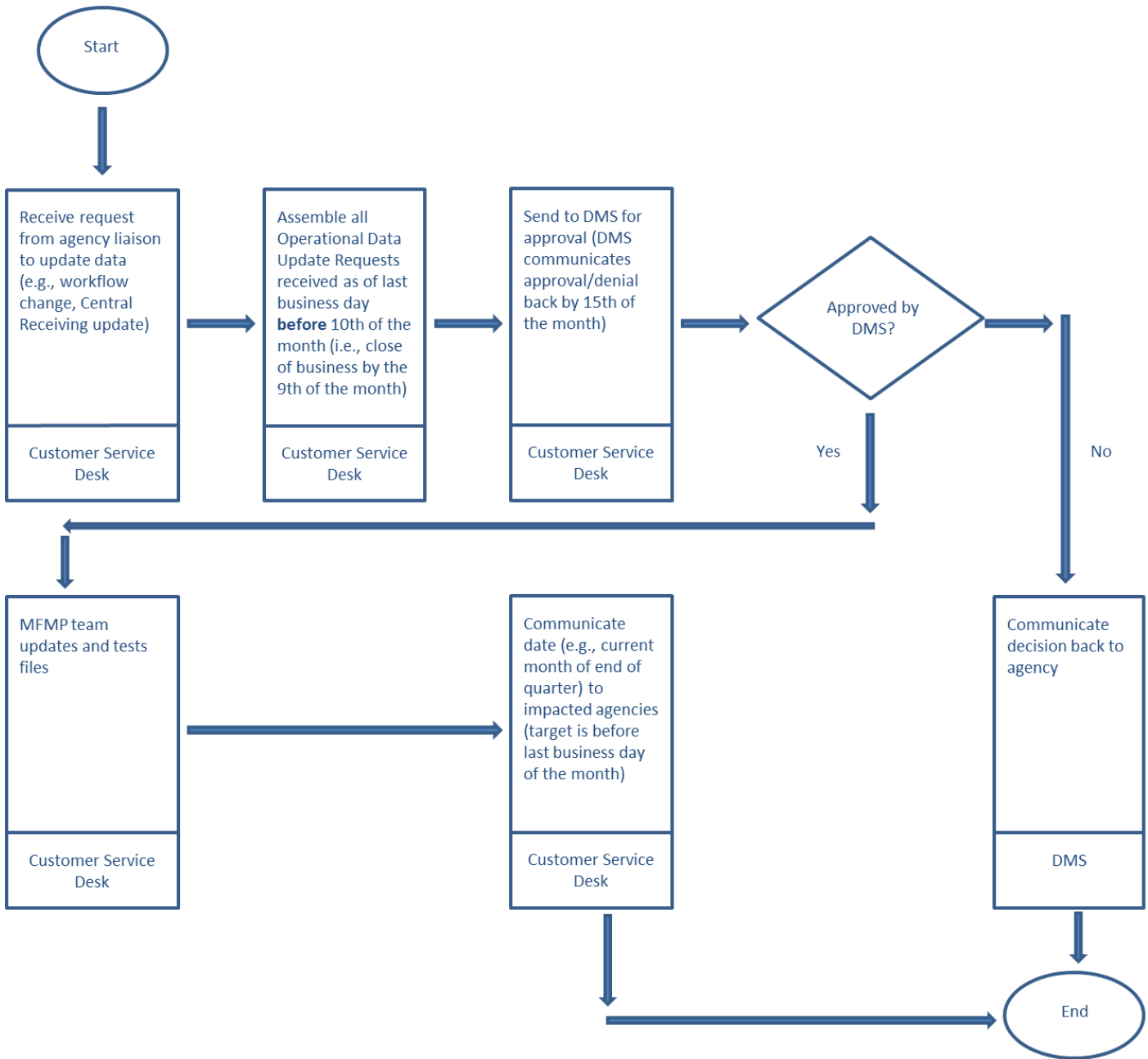
Please keep in mind that these changes do require a system update and MFMP cannot complete your request immediately.

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

Workflow Update Process

To initiate a workflow or central receiver update, email your request to BuyerHelp@MyFloridaMarketPlace.com. Either your agency Purchasing Director or Finance and Accounting Director must approve all requests.

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

```
    ┌─────────┐
    │  Start  │
    └─────────┘
         │
         ▼
```

Receive request from agency liaison to update data (e.g., workflow change, Central Receiving update)	Assemble all Operational Data Update Requests received as of last business day **before** 10th of the month (i.e., close of business by the 9th of the month)	Send to DMS for approval (DMS communicates approval/denial back by 15th of the month)	Approved by DMS?	
Customer Service Desk	Customer Service Desk	Customer Service Desk	Yes	No

MFMP team updates and tests files	Communicate date (e.g., current month of end of quarter) to impacted agencies (target is before last business day of the month)	Communicate decision back to agency
Customer Service Desk	Customer Service Desk	DMS

```
                                          ┌─────────┐
                                          │   End   │
                                          └─────────┘
```

Monthly maintenance requests include updates related to central receiving files or approved additions of roles, resulting in new workflows, for an agency.

Creating New MFMP Accounts

A key MFMP System Administrator 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. The MFMP team recommends requiring new MFMP users to take training, prior to using the system. View a sample training welcome email in Appendix D for more information.

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

Steps to Success: Creating new customers
1. **Title:** Provide an appropriate title for the eForm following your agency's standard titling convention.

2. Select the maintenance mode that indicates whether you are adding, updating or deleting an account.

3. Complete the eForm with the fields discussed below.

Entity*: This field auto-populates based on the System Administrator's entity.
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. This email address is also used for Password resets.
Management Level*: Spend authority (i.e., maximum level or amount this customer can spend/approve without supervisory approval). This is discussed further in the Management Level section below.

Supervisor*: Enter the account holder's supervisor 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 (Purchasing Unit Identifier) 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. For more information about Groups and Roles, Refer to the Groups and Roles section.
Confirm the changes and submit the eForm. While you have the option to add an approver, it is unnecessary.

4. Once you create an account, you need to create a Password eForm to establish the account's initial password.

*The above fields are required when adding a customer.

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. The MFMP team recommends, as a best practice, to mirror an agency customer's Management Level/Spend Authority with their Pcard Authority.

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

(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; 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 the state agencies using MFMP. All MFMP customers can create an invoice (no groups are required).

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.

Group Definitions

The following table offers descriptions of all groups for each type of user in MyFloridaMarketPlace. Descriptions of each group will appear in the second column along with any eForm access that is associated with the group.

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.

Groups	
ABOI (Available Balance Override Indicator) Edit	**Description:** Allows customers to edit the Available Balance override Indicator (on the Accounting details page of a requisition or invoice reconciliation). **eForm Access:** Invoice
ADA	**Description:** For customers with this group, the system removes some tables and scroll bars, which makes screen readers more effective. **eForm Access**: Invoice
Analysis	**Description:** Allows customers to access MFMP Analysis. Customers are able to run ad-hoc reports on historical transactions, and export reports into Excel. While Analysis is a robust application, it can be complex. **eForm Access**: Invoice
Buyer	**Description:** 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 No Workflow	**Description:** Allows customers to make specific changes to a requisition without generating the

	workflow. A customer can change most fields without generating the requisition workflow. See Appendix B for all the fields. **eForm Access**: Invoice
Contract	**Description:** Allows customers to create and edit Contract Requests. **Inherits:** Edit Accounting; Query group **eForm Access**: Invoice
Contract Exemption	**Description:** Allows customers to create and edit a Contract Exemption eForm to exempt a contract from the transaction fee. **eForm Access:** Invoice and Contract Exemption
Contract Manager	**Description:** Allows customers to create a contract request and edit a Restore Contract eForm. **Inherits**: Edit Accounting; Query group **eForm Access:** Invoice and Restore Contract
Edit Accounting	**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. **eForm Access**: Invoice
eQuote	**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
FLAIR Maintenance	**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.

	eForm Access: Invoice, FLAIR Login Information eForm
Invoicing	**Description:** Allows customers to reconcile, submit, approve, reject and refer IRs (invoice reconciliations). **Inherits:** Edit Accounting See Appendix A for a listing of the fields. **eForm Access:** Invoice, Payment Update, Release Encumbrance, Delete Disbursement, Restore Payment Amount
No Approver Emails	**Description:** 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. **eForm Access**: Invoice
No Supervisor	**Description:** 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. 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. **eForm Access**: Invoice
No Watcher Emails	**Description:** Prevents customers from receiving notifications for items pending their optional approval. Customers can also customize their email notifications by updating their customer preferences. **eForm Access**: Invoice
PO Not Sent	**Description:** Allows customers to indicate when a PO should not be sent to a vendor. **eForm Access**: Invoice
Purchasing	**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	**Description:** Allows customers to perform system searches. Without this group, customers can search only for items they created or approved. **eForm Access**: Invoice
Req 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
Requester	**Description:** Allows customers to create and submit requisitions. **eForm Access:** Invoice and Cancel Requisition
Sourcing	**Description:** This group allows customers to access and view electronic quotes in MFMP Sourcing.
Sourcing eQuote	**Description:** This group allows customers to complete electronic quotes in MFMP Sourcing. Using eQuote; you can get electronic quotes from vendors who participate in the eQuote process.
System Admin	**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
Transaction Fee Exempt	**Description:** Customers in this group can exempt a requisition from the transaction fee. Mark as exempt only transactions exempt by Rule, 60A-1.032. **eForm Access**: Invoice
Update Encumbrance	**Description:** Allows customers to restore funds to an encumbered order. This might be necessary in specific use cases such as when a warrant is cancelled or an encumbered disbursement fails Central FLAIR. **eForm Access**: Update Encumbrance

Role Definitions

The following table lists all roles available for users in MyFloridaMarketPlace. Each role is assigned by PUI and will appear in the following format: "PUI: Role Title." An example is 7200: FCO Approver.

Roles
Budget Approver
Budget Office
Cancellation Approver
Central Receiver
Contract
Contract Manager
Contract Office
Contract Specialists
Exception Handler
Executive Approver
FA (Financial Approver) Approver
FCO (Fixed Capital Outlay) Approver
Fleet Approver
Insurance Approver
Invoice Manager
Invoicing Gatekeeper
IT Approver
Legal Approver
Mobile Equipment Approver
OCO (Operator Capital Outlay) Approver
Personal Approver
Purchasing Agent
Purchasing Gatekeeper
Purchasing Office
Quality Assurance Approver
Reprographic Approver
System Administrator
Telecommunications 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 user in MyFloridaMarketPlace. The type of user will appear at the top of the table (eg. System Administrator).

The recommended groups and/or roles will appear in the first column (eg. System Admin, Analysis, and Query groups and System Administrator Role by PUI). Descriptions of each group and/or role will appear in the second column along with any eForm access that is associated with the group/role.

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 by business function.

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 MFMP Analysis. Customers are able to run ad-hoc reports on historical transactions, and export reports into Excel. While Analysis is a robust application, it can be complex. **eForm Access**: Invoice
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
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.

Finance and Accounting	
Analysis group	**Description:** Allows customers to access MFMP Analysis. Customers are able to run ad-hoc reports on historical transactions, and export reports into Excel.

	eForm Access: Invoice
ABOI Edit group	**Description:** Allows customers to edit the Available Balance override Indicator (on the Accounting details page of a requisition or invoice reconciliation). eForm Access: Invoice
CO No Workflow group	**Description:** Allows customers to make specific changes to a requisition without generating the workflow. A customer can change most fields without generating the requisition workflow. See Appendix B for all the fields. **eForm Access**: Invoice
Edit Accounting group	**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. **eForm Access**: Invoice
FLAIR Maintenance group	**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. **eForm Access:** Invoice, FLAIR Login Information eForm
Invoicing group	**Description:** Allows customers to reconcile, submit, approve, reject and refer IRs (invoice reconciliations). **Inherits:** Edit Accounting See Appendix A for a listing of the fields. **eForm Access:** Invoice, Payment Update, Release Encumbrance, Delete Disbursement, Restore Payment Amount
Finance and Accounting Roles	**PUI XXXX:** Invoicing Gatekeeper **PUI XXXX:** Invoice Manager **PUI XXXX:** Exception Handler

Purchasing	
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. **eForm Access**: Invoice

CO No Workflow group	**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. Customers will also need the Purchasing group to be able to change requisitions with the same PUI. See Appendix B for all the fields. **eForm Access:** Invoice
Contract group	**Description:** Allows customers to create and edit Contract Requests **Inherits:** Edit Accounting; Query group eForm Access: Invoice
Contract Exemption group	**Description:** Allows customers to create and edit a Contract Exemption eForm to exempt a contract from the transaction fee. **eForm Access:** Invoice and Contract Exemption
Contract Manager group	**Description:** Allows customers to create a contract request and edit a Restore Contract eForm. **Inherits**: Edit Accounting; Query group **eForm Access:** Invoice and Restore Contract
Edit Accounting group	**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. Without this group, customers can edit only the organization code, expansion option and object code. **eForm Access**: Invoice

Purchasing (continued)	
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 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

Contracting	
Contract group	**Description:** Allows customers to create and edit Contract Requests **Inherits:** Edit Accounting; Query group **eForm Access**: Invoice
Contract Exemption group	**Description:** Allows customers to create and edit a Contract Exemption eForm to exempt a contract from the transaction fee. Always complete the form if contract is exempt. **eForm Access:** Invoice and Contract Exemption

Contract Manager group	**Description:** Allows customers to create a contract request and edit a Restore Contract eForm. **Inherits:** Edit Accounting; Query group **eForm Access:** Invoice and Restore Contract
Contracting roles	**PUI XXXX:** Contract Manager

Requester	
Edit Accounting 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 Purchasing group. **eForm Access**: Invoice
eQuote group	**Description:** This group allows customers to complete electronic quotes in MFMP Sourcing. Using eQuote; you can get electronic quotes from vendors who participate in the eQuote process. System administrators can grant agency customers eQuote access.
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
Requester group	**Description:** Allows customers to create and submit requisitions. **eForm Access:** Invoice and Cancel Requisition
PO Not Sent group	**Description:** Allows customers to indicate when a PO should not be sent to a vendor. **eForm Access**: Invoice
Requester roles	Not Applicable Requesters do not require roles.

Approver	

Req Approver group	**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
Edit Accounting 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
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
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

Non-specific Groups	
ADA (American Disabilities Act) group	**Description:** For customers with this group, the system removes some tables and scroll bars, which makes screen readers more effective.

	eForm Access: Invoice
Analysis group	**Description:** Allows customers to access Analysis. Customers are able to run ad-hoc reports on historical transactions and export them into Excel. **eForm Access**: Invoice
No Approval Emails group	**Description:** 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. **eForm Access**: Invoice
No Supervisor group	**Description:** 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. 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. **eForm Access**: Invoice
No Watcher Emails group	**Description:** Prevents customers from receiving notifications for items pending their optional approval. Customers can also customize their email notifications by updating their customer preferences. **eForm Access**: Invoice
Query group	**Description:** Allows customer to perform system searches. Without this group, customers can search only for items they created or approved. **eForm Access**: Invoice
Buyer group	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.

Viewing User Groups and Roles

System Administrators can view their agency user's assigned group(s) and roles(s), along with all historical changes made to that user's profile in MFMP. The ability to view changes made a user's profile may help System Administrators if they desire to mirror a new user's assigned groups and roles with an inactive user.

COMPLETE FORM - USER MAINTENANCE

Select Maintenance Mode: Update
Name:

	Old Value ↑	New Value
	Changed BillingAddress from A010liyw.q	to A0z71os.q
	Changed FLPUI from 7002	to 7003
Changes:	Changed Groups from [No Supervisor]	to [Edit Accounting, No Supervisor, Query, Req Approver]
	Changed Roles from null	to [7003: Exception Handler, 7003: Invoice Manager]
	Changed SiteCode from 700000-R2	to 700000-CO

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.

6. Click the Composing link on the shortcut menu and delete all transactions listed within this queue.
7. Log in as the System Administrator, and update the User Maintenance eForm:
    a) Inactivate the email address of the user by placing three x's in front of the user's old email address (eg. Xxxjohn.smith@myflorida.com).
    b) In the User Maintenance eForm Name field, add the label 'inactive' before the customer's name (e.g. Inactive-John Doe).
8. If the inactive user is responsible for approving active transactions, delegate their approval authority to another active user.
9. 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.
10. Remove all roles and groups with the exception of the Buyer and Sourcing eQuote groups.
11. Delegate the approval authority to another user. Once you delegate the user approval authority, the delegate can perform the following actions:
    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)
    c) Process invoices routed to the departing employee

Steps to Success: Deleting an account
After performing the activities highlighted in the [Account Inactivation](#) section, you can delete a user account if the employee:
1. Acted as an Approver only or,
2. Does not have any requests in the following statuses:

Composing
Submitted
Approved
Ordering
Ordered
Canceling
Receiving

3. Did not create a requisition 'On Behalf Of' another user

MFMP System Cleanup

The MFMP team recommends that each agency perform an annual system cleanup effort to delete un-needed pending transactions. System Administrators should develop a list of requisitions in composing status and eQuotes in draft status that users have created but have no intention of completing. System Administrators may wish to use the PRs in Composing Status and the Sourcing eQuote Event Activity reports on the Secure Reports website to develop these lists. This cleanup process will ensure that old and outdated information is removed from the system. Appendix E contains a communication template to communicate with users who need to clean up their requisitions in composing status and Appendix F contains a communication template to communicate with users who need to clean up their eQuotes in draft status.

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.

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

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		
PO Start Date	Int Budget Ind	Gen Led
PO End Date	Category	Encumbrance Gen Led
PUI	Category Year	Ext Gen Led
Fiscal Year	State Program - Standard	Encumbrance Ext Gen Led
Line item description	External Program	Product ID
Available Balance Override Indicator	Grant	Ext Object
Advanced Payment Indicator	Other Cost Accum	Carry Forward
Organization Code	Contract	Batch
Expansion Opt	Agency Unique	Description (Split Accounting description)
Opt Version	Contract Year	Quantity
Object Code	Grant Year	Count
Prior Period Indicator	Project ID	Sub-Vendor
Budget Entity	Ext Category	

Appendix C – 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.

    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.

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](#) 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 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.

Appendix D – Sample New MFMP User 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 guide you through the steps needed to create orders, pay invoices, and other types of actions need in MyFloridaMarketPlace. Please watch the trainings that match your position's role or responsibility in MFMP (eg. 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.
The MFMP team recommends that all agency customers view the Accounting Details, Change Order, F&A Quick Reference Guide, Negative Receiving, and Vendor Inactivation job aids.
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.
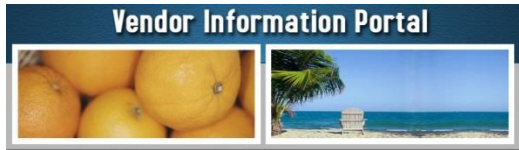
Vendor Information Portal (The username and password is 'publicuser'. Enter in lower case.) – This MFMP application provides Florida's vendors with self-service tools for registration, account maintenance, performance rating reviews (VPT), and transaction fee reporting.

Additional Helpful Links:

State Contracts and Agreements
Florida Statutes (Purchasing - Chapter 287; Prompt Payment Chapter 215.422)
Florida Administrative Code

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 – Requisition Cleanup Communication Template

Good morning/afternoon,

[Your Agency Name] has identified numerous Purchase Requisitions (PRs) in MFMP Buyer that are *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 users to 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 F – eQuote Cleanup Communication Template

Good morning/afternoon,

[Your agency] has identified numerous eQuotes in MFMP Sourcing that are *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 users to review and delete any eQuote in *draft* status that is 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 (either by 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. You can automatically mark a requisition to encumber funds through MyFloridaMarketPlace and FLAIR. You 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 you submit 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 your 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 you are 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) - Requester's 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 actually 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 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 MyFloridaMarketPlace 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 of the Florida Administrative Code (F.A.C.), 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 or (866) 352-3776 for assistance with MFMP, eQuote, MFMP Sourcing and VIP Technical assistance.

For password resets use the password reset functionality or contact your agency 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

- Local Registration: http://www.dms.myflorida.com/mfmp/agencycustomer/registration

- Statewide Registration: http://www.dms.myflorida.com/mfmp/agencycustomer/statewideregistration

- Exclusive MFMP online training: http://www.dms.myflorida.com/mfmp_buyer_tours

- Training materials: http://www.dms.myflorida.com/mfmp/agencycustomer/trainingmaterials

Vendor Searches

Vendor Information Portal: https://Vendor.MyFloridaMarketPlace.com/

- Username and password: 'publicuser' (enter in lower case)