

MyFloridaMarketPlace Scanning and File Attachment Policy

The purpose of this document is to provide agency users with guidelines concerning the scanning and attaching of documents in MyFloridaMarketPlace. MyFloridaMarketPlace is able to store necessary supporting documents related to purchase orders, master agreements and invoices electronically. However, due to the potential negative impact on system performance, and agency requirements to adhere to public record laws such as F.S. 119, the following guidelines should be followed regarding document storage policies in MyFloridaMarketPlace.

MyFloridaMarketPlace was not intended to be a full document management system for scanned versions of paper documents. MyFloridaMarketPlace is designed to support the storage of necessary payment-related information such as purchase orders, contracts and invoices and supporting documentation in conformance with established guidelines. **Attachments that include confidential information are not considered appropriate for uploading into MFMP, and if they are confidential, uploading them into MFMP may violate F.S. 119.071 as well as comparable federal regulations relating to confidentiality such as HIPAA. It is the agency's responsibility to redact this information prior to posting it to MyFloridaMarketPlace. Workflow approvals that are included in MyFloridaMarketPlace offer the opportunity for multiple users to identify and take action against a transaction that includes confidential information, including initiating the 'Attachment Purge Request' process (distributed to each agency on a quarterly basis and posted on the MyFloridaMarketPlace toolkit).**

Experience to date has indicated that there is an inconsistent understanding among agency users about attachment guidelines. As a result, these guidelines have been established jointly by the MyFloridaMarketPlace Project Team, the Bureau of Auditing within DFS and State Purchasing within DMS with a goal of effectively adhering to policies while balancing practical MyFloridaMarketPlace system usage.

While MyFloridaMarketPlace facilitates document attachments as needed for effectively consummating a purchasing agreement between a buyer and a vendor and for supporting the State's payment auditing requirements, each agency remains responsible for appropriately handling confidential records they possess and maintain. Specifically, the transaction data entered into MyFloridaMarketPlace (the values entered into the online fields) will serve as the system of record for the purchase orders issued through MyFloridaMarketPlace. However, the system of record for contracts and other standalone documents, which are sometimes attached in MyFloridaMarketPlace, will not be MyFloridaMarketPlace.

Required Action Regarding Confidential Information

- Remove any confidential information on copies of invoices or other supporting documents prior to scanning or including them in MyFloridaMarketPlace. Save original copies as needed for subsequent audit purposes. Should an agency need to remove an attachment that includes confidential information, the agency should initiate the 'Attachment Purge Request' process (distributed to each agency on a quarterly basis and posted on the MyFloridaMarketPlace toolkit). This process is limited to those attachments that include confidential information that is not redacted and/or removed prior to posting.
- As stated earlier, **attachments that include confidential information are not considered appropriate, and may violate F.S. 119.071 or other provisions of state or federal law regarding confidential information. It is the agency's responsibility to redact this information prior to posting it to MyFloridaMarketPlace.**

Scanner Settings

The Department of State requires that scanned images be captured at a minimum resolution of **300** dots per inch (DPI). Scanning documents at 300 DPI provides good image resolution for printed text. Modern scanners have no problem meeting this image resolution requirement.

Capturing images at a higher resolution than is required sounds like a good idea, but greatly increases the size of the files created by the scanner. Additionally, capturing document images in color (as opposed to black and white) further increases the size of the document file. Larger files take longer to upload which slows down processing of transactions in MyFloridaMarketPlace. Increased file sizes can have a dramatic impact on the time required to attach documents in MyFloridaMarketPlace.

The steps required to configure your scanner vary depending on the make and model of scanner you are using. Please work with your agency's information technology staff to confirm that your scanner is properly configured to capture images in the most efficient manner, e.g. 300 dpi, black and white.

Please refer to the Department of State Bureau of Archives and Records Management website (<http://dhis.dos.state.fl.us/barm/>) for further information regarding the Electronic Record Rule.

File Attachment Sizes

Attachments on a MyFloridaMarketPlace transaction should be **less than 4 megabytes** in size (includes sum of all attachments on the transaction). The Sourcing tool is the only exception to this rule and it supports file attachments of up to **20 megabytes**. The tool will appear to continue loading larger files (i.e., > 20 megabytes); however, the system will only save the first 20 megabytes- resulting in an incomplete upload.

Valid File Types

For documents attached to purchase orders, there are specific file types that are supported by MyFloridaMarketPlace. Attaching invalid file types to a purchase order will result in a failed order transmission that will slow down submission of your order to the vendor.

Recommended file attachment types are:

Recommended File Types For MyFloridaMarketPlace
.bmp – Bitmap Image
.doc – MS Word
.fdf – Adobe Acrobat Forms Document
.csv – MS Excel Comma Separated Values File
.rft – Rich Text Format
.xls – MS Excel Worksheet
.pcx – PCX Image Document
.tif – TIF Image Document
.wri – Write Document

Valid file attachment types are:

File Types Supported by MyFloridaMarketPlace	
.bmp – Bitmap Image	.csv – MS Excel Comma Separated Values File
.doc – MS Word	.DOT – MS Word Template
.fdf – Adobe Acrobat Forms Document	.htm – HTML Document
.html – HTML Document	.JS – Jscript File
.JSE – Jscript Encoded File	.maf – MS Access Form Shortcut
.maq – MS Access Query Shortcut	.mar – MS Access Report Shortcut
.mat – MS Access Table Report Shortcut	.msg – Outlook Item
.oft – Outlook Item Template	.pcx – PCX Image Document
.pdf – Adobe Acrobat Document	.POT – MS PowerPoint Template
.pps – MS PowerPoint Slide Show	.ppt – MS PowerPoint Presentation
.rft – Rich Text Format	.tif – TIF Image Document
.VBE – VBScript Encoded File	.VBS – VBScript File
.wbk – MS Word Backup Document	.wri – Write Document
.WSF – Windows Script File	.xif – XIF Image Document
.xlb – MS Excel Worksheet	.xlc – MS Excel Chart
.xlk – MS Excel Backup File	.xlm – MS Excel 4.0 Macro
.xls – MS Excel Worksheet	.XLT – MS Excel Template

What Type of Documents Should Be Attached in MyFloridaMarketPlace?

Supporting attachments for **purchase order processing** (attachments made through requisitioning):

- Attachments sent to vendor:
 - o Any necessary terms and conditions not entered into the system, but required for the vendor to have the complete description of the transaction, such as specification sheets, diagrams and sketches, or portions of statements of work or supplier contract forms that have not already been made available to the vendor
- Attachments not sent to vendor:
 - o Supporting attachments for requisition processing, not to be included when the DO is issued to the vendor, but available to the requestor, purchasing & accounting may include as needed the following:
 - Bid tabulation documentation
 - Winning bid
 - Sole source approvals
 - Contract exception determination
 - Emergency certification
 - Alternate contract source authority
 - Correspondence requesting, authorizing, explaining or justifying the purchase
 - For any of the above, links or references to these documents may be included in the comments as opposed to attaching the full documents themselves for faster processing.

Supporting attachments for **payment processing** (attachments made via the invoice eForm and Master Agreement setup)

- Paper invoices received by the agency and input into MyFloridaMarketPlace via the invoice e-form and any other documentation needed to support the transaction and/or show compliance with applicable laws, rules and regulations.
- For contractual service agreements less than or equal to \$250,000, a scanned copy of the Summary Form (Chief Financial Officer Memorandum No. 02, 2003-04 – found at <http://www.dbf.state.fl.us/aadir/cm030403.html>) for each payment processed.
- For contractual service agreements in excess of \$250,000, scanned pages from the contract showing contract period, contract amount, deliverables, payment terms, and execution dates to be attached to the master agreement. In lieu of scanning the required pages, a paper copy may be submitted to the Bureau in advance of the MyFloridaMarketPlace payment transactions. Agencies must reference the contract number on the paper copy. Additionally, the MyFloridaMarketPlace transaction should reference the agency contract number and a notation should be made in the MyFloridaMarketPlace comment field that the contract is on file in the Bureau.

Other Points

- Documents in their native file formats (ex. Microsoft Word) are generally smaller in size than corresponding scanned images of the printed document.
- Only final versions of attachments should be included within the system.
- Comment fields are an additional way to capture supporting information regarding a requisition/purchase order or an invoice (when specific documents are not required to be attached).

Frequently Asked Questions Regarding Attachments

- Q: Can my agency fax a copy of an invoice to the DFS Bureau of Auditing rather than scan the invoice?

A: No

- Q: Is my agency required to retain paper versions of invoices for audit purposes?

A: Official Records (in accordance with DOS rule) are required to be maintained by each agency. The decision on whether to retain these in paper or electronic form is the decision of each agency and may be based on the resources available to the agency.

- Q: Is my agency required to retain paper versions of contracts for contract audit purposes?

A: Official Records (in accordance with DOS rule) are required to be maintained by each agency. The decision on whether to retain these in paper or electronic form is the decision of each agency and may be based on the resources available to the agency.