Florida Association of Public Purchasing Officers, Inc. (FAPPO)

2017 AWARD FOR BEST PRACTICE IN PUBLIC PROCUREMENT

SUBMITTED BY:

BROWARD COUNTY PURCHASING DIVISION
115 South Andrews Avenue, Room 212
Fort Lauderdale, FL 33301

A Service of the Broward County Board of County Commissioners
I. Award For Excellence

Section A. Purpose

The FAPPO’s Award of Excellence in Public Procurement recognizes contributions to the public procurement profession. The award program places emphasis on continuous process improvement and outstanding procurement practices. Earning this award is a significant affirmation of the quality of an agency’s procurement operation and demonstration of commitment to the procurement profession. All submittals will have been in effect sometime from January 1, 2016 through February 16, 2017.

Section B. Program Summary

An agency is defined as including both procurement professionals and support staff. Support staff that do not perform procurement functions or perform only clerical duties at the direction of a procurement professional are not to be considered “Procurement Professionals”. Several criteria are examined when considering an application for award: organization and levels of responsibility, source selection, professional development, methods of process improvement, automation, and e-commerce.

Section C. Instructions for Applying

1. All submittals must be true, accurate, verifiable and appropriately documented. Points WILL NOT be granted for information on applications that cannot be validated.

2. Submittals may be submitted by hard copy, or submitted on a USB thumb/flash drive. If submitting by hard copy, at least one original must be submitted. The information requested should be highlighted in the documentation. Electronic submittals must include all documentation, and submitted on a USB thumb/flash drive. (Note: Responses may not be submitted by e-mail, since the receiving agency has very limited capacity for receipt of electronic files. Additionally, the receiving agency has replaced all computers with units which no longer accept electronic CD’s.) All information must be visible on the hard copy or the USB thumb/flash drive. (NOTE: Best Practice Essays must be made available in an electronic format on a USB thumb/flash drive, and submitted by the deadline.) If a link is provided, that link must be accessible to the evaluation committee. Please note that points will not be awarded for areas that are not sufficiently documented, or which cannot be accessed.

3. All submittals must be arranged in the order they appear on the application form. Requested documentation for questions must be included in the explanation area provided. The electronic version of the form will expand to allow as much room for data input as needed. Note that when there is a reference to a “policy”, the entity may also submit documentation from a written procedure as well.

4. All submittals must received by: Keith K. Glatz, CPPO, Procurement & Contracts Manager, City of Tamarac, 7525 NW 88th Avenue, Room 108, Tamarac, FL 33321-2401, Phone: (954) 597-3567, E-mail: keith.glatz@tamarac.org no later than 5:00 P.M. on February 16, 2017.

5. Any material deviations from the foregoing rules will render a submittal non-responsive. Such submittals shall not be evaluated for award.

6. Submittals may be posted on the FAPPO web site in the future.

7. FAPPO reserves the right to reject late Entity Award responses, or responses are accepted, assess a late penalty deduction of up to 10 points from the final score earned by the late submitting agency.

There are a total of 167 points possible for the Award of Excellence Program. A score of at least 124 points is required to receive the “Award of Excellence”. 

1 of 5
II.  **Best Practice in Public Procurement**

Entries for the Best Practice Award will be considered for one of for three categories. This award is separate from the Award of Excellence, and recognition shall be at the opening session of the annual conference in order to allow for best practices to be shared with the membership during a workshop to be scheduled during the conference. The three general categories for Best Practices Awards are as follows:

1. **Innovation in the Procurement Process** – This award will spotlight a unique achievement in how we do our job. Innovations in practices, technology, creative use of existing technology, and/or best practices that promote effectiveness or a positive change or impact in the Procurement process. This category is for “out of the box” innovation.

2. **Cost Savings** – Best practices that promote cost savings for the Entity, either in terms of lower product/service costs, or lower administrative costs. Innovative techniques that improve the level of economy for the entity, or promote greater efficiency for the entire procurement process will be considered in this area.

3. **Contribution to the Advancement of Community, your Entity, or the Public Procurement Profession** – This award will focus on best practices that contribute to the overall social good, or that promote professionalism in public procurement. This category reflects those practices that add value to the overall procurement process and contribute to the overall good of the community or towards the achievement of the goals of the entity.

Best Practice Essays should not be more than five (5) pages in length. Supporting documentation for the essay MUST BE FURNISHED WITH YOUR SUBMITTAL.

In all cases, consideration will be given to best practices that reflect a strong commitment to the development of a high quality product or process, and can be instituted as a standard practice in the entity that can be continued or repeated on an ongoing basis.

In addition to the Best Practice Award winners, other Best Practice Essay submittals that reflect positive contributions to the profession may be given “Special Recognition”, and featured for display during the annual conference. Winners of each Best Practice Award will be asked to provide a presentation to the membership relating to the subject of their essay as a part of a workshop as scheduled during the annual Spring Conference. Electronic presentations (i.e. Power Point, etc.) will be requested from each submitting entity, and those presentations must be provided at least two (2) weeks prior to the start of the Spring Conference to keith.glatz@tamarac.org.

You may apply for the Award of Excellence and/or the Best Practice Award. If you are applying for both awards, please submit each application under separate cover.

**FAPPO Bucks**: Entities submitting applications for either award may qualify for FAPPO Bucks. $300 FAPPO Bucks will be awarded to entities who submit an Award for Excellence Application with a score of at least 90% of the required passing score (i.e. minimum passing score of 125 points x .90 = 112 points). $300 FAPPO Bucks will be awarded to each of the three successful Best Practice Award winners; and $25 FAPPO Bucks will be awarded to those Best Practice Award entries that receive an Honorable Mention. Winners will be notified prior to the Spring Conference in order to allow for the proper allocation of FAPPO Bucks.

FAPPO is very interested in receiving many and varied Best Practice Award entries; HOWEVER, an entity is only eligible to receive FAPPO Bucks for ONE (1) Best Practice Award entry per entity. For example, if an entity submits two (2) Best Practice Award entries, and is named as the winner for one of the categories listed above, then the maximum number of FAPPO Bucks available to them for the Best Practice Award will be $300 FAPPO Bucks. If none of the entity’s Best Practice Awards applications is the winner for one of the categories listed above, but are eligible for an Honorable Mention, the entity will receive a maximum of $25 FAPPO Bucks total. Even if an entity receives FAPPO Bucks for a Best Practice Award Application, the entity may still receive $300 in FAPPO Bucks for an Award of Excellence application.

In summary, the maximum available FAPPO Bucks for the FAPPO Awards Program is as follows:

- Award of Excellence application with at least 90% of the required score: **$300 FAPPO Bucks**
- Best Practice Award Winner: **$300 FAPPO Bucks**
- Maximum Total: **$600 FAPPO Bucks**
Every attempt will be made to announce winning entries in order to facilitate the use of FAPPO Bucks for the upcoming FAPPO Conference; however, since the decision regarding the winners of the Award of Excellence and the Best Practice Award may not be disclosed until shortly before the Spring Conference, recipients who receive FAPPO Bucks for one of these awards may defer the use of their FAPPO Bucks until the Spring Conference to be held the year immediately following their receipt of the FAPPO Bucks.

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AWARD OF EXCELLENCE IN PUBLIC PROCUREMENT
AND/OR
BEST PRACTICE AWARD APPLICATION

Section III. Application

This application should be completed and mailed to Keith K. Glatz, CPPO, Purchasing & Contracts Manager, City of Tamarac, 7525 NW 88th Avenue, Room 108, Tamarac, FL 33321-2401, Phone: (954) 597-3567, E-mail: keith.glatz@tamarac.org no later than 5:00 P.M. on February 16, 2017 with all requested attachments. This application, attachments and any other correspondence will be submitted to the Entity Award Committee for evaluation. The official submitting the application will be advised of the decision upon completion of the review process.

Name of Entity and Procurement Unit

**Broward County Board of County Commissioners, Purchasing Division**

(As it will appear on the certificate)

Fiscal Year Ended (month, day, year) **September 30, 2016**

Official submitting the application (receives notification of results).

Name: **Brenda J. Billingsley** Title: **Director of Purchasing Division**

Street Address: (required): **115 S. Andrews Avenue, Room 212**

City/State/Zip: **Fort Lauderdale, FL 33301**

Phone/Fax/E-mail: **954-357-6070 / 954-357-8535 / bbillingsley@broward.org**

If desired, to whom (mayor, board chairman, city manager, etc) would the entity prefer that FAPPO mail the formal announcement of the Award?

Name: **Brenda J. Billingsley** Title: **Director of Purchasing Division**

Street Address: (required): **115 S. Andrews Avenue, Room 212**

City/State/Zip: **Fort Lauderdale, FL 33301**

Phone/Fax/E-mail: **954-357-6070 / 954-357-8535 / bbillingsley@broward.org**
II. ESSAY - BEST PRACTICES

<table>
<thead>
<tr>
<th>Description</th>
<th>Document</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe in essay format at least one innovative program, idea or process developed by the Procurement Agency during the past year (2016/2017) that was successfully implemented by the Procurement Department/Division in accordance with the criteria shown herein. Describe the process. Include cost to implement and benefits to the agency.</td>
<td>Provide summary at right and attach essay (no more than five (5) pages)</td>
<td>Best Practice essay entitled: “Innovation in Technology: Procurement Tracking System (“ProcureTrack”) Approved by the Purchasing Division Director on 12/12/16 (8 page essay, plus 13 exhibits)</td>
</tr>
</tbody>
</table>

Category 1: “Innovation in the Purchasing Process”

1. **Innovation in the Procurement Process** – This award will spotlight a unique achievement in how we do our job. Innovations in practices, technology, creative use of existing technology, and/or best practices that promote effectiveness or a positive change or impact in the Procurement process. This category is for “out of the box” innovation.
1. Introduction

The Broward County Purchasing Division, in partnership with our client agencies, has developed ProcureTrack, an automated scheduling, notification and workflow system to keep County procurements on-track. ProcureTrack enables the management team to effectively control the tasks, activities, and timelines of a project from the solicitation process to the project phase to identify pain points, bottlenecks, and opportunities for process and/or project management improvements to prevent unnecessary delays from a 360 degree procurement to project management point of view.

Based on target dates agreed upon by the stakeholders for each milestone in the procurement process at the inception of a procurement, ProcureTrack schedules each milestone of the procurement process to meet the overall agreed upon target award and project delivery date. ProcureTrack routes documents through an automated workflow to partner agencies for review and processing, provides reminders to contributors when items are approaching due dates, and alerts senior management when the established procurement schedule is not on track.

When contributors complete their step in the process earlier than scheduled, ProcureTrack is able to adjust future milestone dates earlier to capitalize on efficiencies and expedite the overall anticipated procurement schedule. If any milestone is not met, ProcureTrack alerts procurement owners to review future scheduled steps to determine if and how future scheduled milestones need to be adjusted. ProcureTrack provides procurement owners the flexibility to extend the overall end date of a procurement or adjust the schedule for individual milestones.

ProcureTrack will replace manual entry of milestone achievements and provide stakeholders with both the real-time status of individual procurements, a consolidated report dashboard, and tool to manage all their active procurements.

Some of the benefits of the ProcureTrack system are:

- Creates a schedule with tasks, milestones and assignments to establish accountability for the work that must be done.
- Increases efficiency in all procurements by replacing intensive labor process with an automated solution.
- Allows proactive solutions to process problems and delays.
- Retains historical data for statistical analysis.
• Allows for accurate planning and forecasting in over-all project schedules.
• Allows for accurate planning and forecasting in employee assignments.
• Provides County administrator and Directors the ability to continuously monitor work streams to ensure smooth progress throughout a project.

The application is designed so that it may be used as a stand-alone system, if required. However, the maximum benefits and efficiencies are achieved when it is interfaced with an ERP System, and in our case PeopleSoft, the County's financial system of record, and ContractsCentral, Broward’s home-grown web-based contract administration application.

The Broward County Administrator, Department Directors, Purchasing Division Director, and especially Public Works Department Director have enthusiastically embraced ProcureTrack for its ability to establish baseline schedules for every procurement process, and compare actual task completion dates against the baseline dates. This information was not previously available in our database. As a result, it was difficult to provide status reports on project schedules and send automatic alerts regarding delays to appropriate staff members manually.

2. Business Need/Problem

In 2013, the Director of Purchasing established a Countywide Procurement Taskforce comprised of Directors from all County Agencies to comprehensively review the county's procurement policies, procedures and ordinances to identify any opportunities to improve policies and procedures and streamline processes that will positively impact the county’s procurement cycle. One major concern of the Taskforce was the need to expedite procurements by better managing the delays during the process. Each procurement requires review and action by various stakeholders in order to progress; including the Client Agency, the Purchasing Division, the County Attorney, Risk Management, the Office of Economic and Small Business Development, and others. Although Broward used a passive milestone system in the past to record procurement progress, no target award dates or overall schedules were established for a procurement. Additionally individual contributors had no established time frames for completing their actions in the process or had any target dates when they would need to take action. Each stakeholder would receive documents for review whenever the previous stakeholder completed their part. As such individual stakeholders could be on vacation or be otherwise committed to another task when documents required their attention resulting in delays. Monitoring and expediting the process was a manual reactive process whereby the Purchasing Agent and the Project Manager had to monitor any delays and try to facilitate completion of each milestone by contributors on a case by case basis with no expected target dates. Management was often unaware of any processing delays until it was too late. Stakeholders lacked clear expected time frames for their actions, lacked the ability to anticipate and manage their workload, and could not be easily held accountable for any delays. To address this problem the Countywide Procurement Taskforce members suggested:

a. Establishing expected baseline schedules, or target dates, for completion of each procurement that would allow stakeholders to better manage their expected workload.
b. Creating an active tool for management to proactively monitor procurement processes in real-time and be notified when schedules were not being met so that additional resources could be directed to any delay points to keep procurements on track.

c. Ensuring procurement schedules could be extended only after review and concurrence by senior management.

d. Providing the ability to take advantage of opportunities to accelerate the overall schedule when tasks are completed before the established due dates. And to notify stakeholders later in the process of the revised target dates for their input.

3. Description

ProcureTrack is a web-based, secured application that establishes baseline schedules for every procurement process and provides flexible tracking of progress in a procurement process. Procurement projects are monitored through a pre-defined set of tasks and milestones. Each task has a duration and tasks are grouped into milestones. The system allows management to define the tasks and milestones, create process types templates and assign tasks to process types. Each requisition is associated to a process type (i.e. Bid, RFP etc.).

The system uses a master template based on the procurement method to create a base line comprehensive Gantt Chart-like schedule that includes the project phases, the pre-defined tasks, milestones, time and resources. The master template is divided into three phases: Pre-requisition Phase, Requisition to Procurement Phase and Post- Award Phase. Each phase contains a list of tasks, milestones, the amount of time it will take to complete the task, and the required resources to achieve the project objectives. The system automatically calculates start and finish dates for each task and milestone, based on the date the project is created.

To initiate a project a client agency’s Project Manager enters basic project information into ProcureTrack and must attach the project scope to create the project. Email notifications are sent to the Client Agency Staff and the Purchasing Division Managers. Upon the Purchasing Managers assigning a Purchasing Agent to work on the procurement, an email notification is sent to both the Purchasing Agent and the Client Agency’s Requester. The Purchasing Agent enters the stakeholders and contributors who will be working on the project. The application validates the names of the individuals against the County’s Employees Roster to ensure they are active employees. The baseline schedule may be adjusted during project inception, in consultation with the stakeholders, so that the actual agreed upon procurement schedule best reflects project priority levels and resource availability. This allows for advance notification to stakeholders on when they will be required to be available to complete their responsible part within the process.

As the procurement progresses, Project Managers are able to capitalize on opportunities to speed up the schedule when tasks are completed before the due dates. ProcureTrack provides the capability to make changes and tweak the default schedule as necessary. The duration of a task can be changed to lengthen or shorten the time allotted for the task without expending the project timeline;
or shift all dates in the project timeline forward or backwards. It requires the approval of both the Purchasing Division and the Client agency to effectuate the change. The system also allows the Project Manager or the Purchasing Agent to add new tasks or remove tasks that were inherited from the default schedule.

**Purpose**

Broward County administration and Department Directors want to get status updates from project outside of regular meetings to ensure that the works flow from one process to the next and procurement projects are completed timely. The purpose of the procurement tracking system is to provide the ability to establish baseline schedules for every procurement process; compare actual task completion dates against the baseline dates; send automatic alerts to different levels of management based on the schedules and track responses to exceptions.

**Objectives**

The specific project objectives are:

- Provide the ability to create/modify templates to set expected schedules.
- Provide the capability to lock down the schedule, and the schedule can only be changed unless both parties, the Purchasing Agent and Requester are in concurrence.
- Provide the capability to send automatic notifications/alerts to appropriate stakeholders when delays occur.
- Provide the ability to track responses to exceptions (meeting dates, action items, solutions, etc.).
- Implement a secured-web application which ensures that only individuals assigned to a particular solicitation can update it.
- Maintain audit trails.
- Allow Staff to access the application via the internet anytime and anywhere.
- Provide Purchasing Division staff the ability to create new milestones, dynamically change milestones for each procurement.
- Calculate processing days that Purchasing Division, Client Agencies’ staff, and other stakeholders spent on each procurement.
- Provide the capability to view/report status against the schedules through dashboards.
- Provide capabilities to export a procurement milestones set to Microsoft Excel or Adobe PDF file.
- Provide the capability to attach multiple documents and notes to a task or the project.
- Interface with PeopleSoft, the County’s main Procurement/Financial System, to lookup requisitions, purchase orders, procurement contracts and vendor information.
- Interface with the County’s LDAP service to get active user account for task assignment and notifications.

**Time Frame for Development**
Actual development, testing, documentation, and implementation have occurred over approximately a six month period. The application went live on December 12, 2016.

We’ve met with Public Works Department Staff, Purchasing Managers and Agents to identify business procedures and review the Request For Proposals (RFP) process. Based on the objectives and requirements, the Purchasing Division’s IT Team has designed and developed the application in Microsoft C#, ASP.NET, Telerik, Entity Framework and Microsoft SQL Server Database. To ensure that users and stakeholders who will be receiving notifications are active employees, the application interfaces with the County’s LDAP (Lightweight Directory Access Protocol) service to validate them.

**Target Audience**

The application was developed for and by the Purchasing Division in conjunction with Public Works Department. It is designed to serve the entire County.

- Public Works Department and Purchasing Division have conducted the requirements analysis.
- Purchasing Division Staff has developed the application, and provides application and database support.
- Purchasing Division and the Client Agencies are responsible for different tasks. They can see and review all tasks and milestones for their requisitions. The system sends automatic notifications to appropriate stakeholders if there are delays.
- The application is used as a vehicle to communicate with the vendors through email notifications and links to respond.
- County Administrator, Department Directors and Staff have access to the dashboard, which is a real-time interface, showing graphical presentation of the current status and history of the requisitions.
- The system enables the management team to effectively control the tasks, activities, and timelines of a project from the solicitation process to the project phase to identify pain points, bottlenecks, and opportunities for process and/or project management improvements to prevent unnecessary delays from a 360 degree procurement to project management point of view.

**County’s Role in Development and Implementation**

- In 2013, the County Administrator and the Director of Finance and Administrative Services Department implemented a Countywide Procurement Taskforce to review the current Procurement Code and make recommended process and Code changes to the Board of County Commissioners. The Procurement Task Force established the Information Technology Sub-Committee to develop a procurement tracking system to establish baseline schedules for every procurement process.
- The project was primarily sponsored by the Finance and Administrative Services Department, Purchasing Division and Public Works Department.
4. Technology and Features

The ProcureTrack is a secured web-based application that is accessible by any standard web browser. Like other software development projects, multiple programming tools were utilized to achieve the maximum benefits of software development. The application was developed in C#, ASP.NET, Telerik and Microsoft SQL Server. The application logics are coded in C# and the Graphical User Interface in Telerik. One of our main objectives was to implement an application that is maintainable. The application is highly configurable by the end-users.

The ProcureTrack provides three main sets of tools that:

1. Allow the application administrator to set user and group permission, generic email contents for notification and due/warning days for tasks.

2. Allow the Purchasing and Using Agency to define a master set of tasks for each procurement methods or process type, new tasks, the relationship between tasks and assign due dates and resources for the tasks. The procurement processes and associated tasks and milestones need to be completely configurable so that they can be changed over time as business needs change.

3. Allow the Project Manager and Purchasing Agent to maintain dynamic e-form to get information from the task’s owner on the fly.

5. Budget/Cost

The development and implementation of the application did not require an upfront investment, such as purchasing a software license and new hardware. It is installed on existing Broward County web and database servers. The application was designed and built in-house by the Purchasing Division Developers. Throughout the development process, the technical team worked in collaboration with Purchasing Managers, Purchasing Agents, Public Works Department, and the IT Sub-Committee to gather business requirements and for quality assurance and testing.

6. Project Results/Success/Benefits

Only the customer can define the application requirements and assess the quality and result attained by the application. During a dry run, the Director of Public Works said, “It reaches beyond my expectations. It is easy-to-use, productive and maintainable.” Also, during the dry run the County Administrator directed the Director of Public Works to identify the first projects for an immediate “go live” launch. The County Administrator stated during the meeting that this application has real business value by providing staff the necessary tool to manage a project efficiently and replacing a manually intensive labor process with an automated solution, as well as affording all stakeholders,
including County Administration, the ability to continuously monitor progress on projects through the use of dashboards to ensure the project is completed in a timely manner.

This application has successfully been designed to directly integrate with PeopleSoft and ContractsCentral. The application was officially launched back on December 12, 2016.

The application yields the following results:

- Provides a single repository for capturing all procurement project information, including project phases, schedules, deadlines, delays and notifications.
- Creates dependencies between tasks to ensure proper resource allocations and project time frames.
- Increases efficiency by replacing manually intensive labor process with an automated solution.
- Promotes team collaboration.
- Retains historical data in database for future statistical analysis and forecasting.
- Ensures milestones are met in a timely manner and reduces project costs.
- Reduces administrative cost by reducing paper consumption.

7. Worthiness of an Award

The Procurement Tracking Systems (“ProcureTrack”) is worthy of the FAPPO 2017 Award for the following reasons:

- Sets time certain expectations for stakeholder contributions and overall procurement schedules
- Increases transparency, oversight and accountability
- Prevents extended procurement timelines without senior management review and approval
- Requires collaboration between diverse stakeholders to ensure buy-in to target timeline and milestones.
- Unlike the commercial off the shelf Project Scheduling tools, this application is specifically designed for Broward County to process procurements based on the County’s policies and procedures. At the same time, the innovative design and architecture are flexible for configuration and future expansion. It can be implemented in any procurement environment.
- The application automates an inefficient manual tasks and processes and reduces paper consumption and costs.
- It supports the County’s “Go Green” initiative.

The project meets and surpasses its expected objectives, by:

- Supporting the County Board of Commissioner’s Vision and Goal of: A “Fiscally Sustainable and Transparent Government” and to “improve operational effectiveness, efficiency and transparency by being an environmentally friendly and transparent agency,
providing cost-effective solutions to deliver services, and improving the quality of life of its residents, businesses and visitors”.

- The system requires approval of the client agency and the Purchasing Division to extend procurements thereby inculcating process ownership and building trust between partners.
- It also provides secured access to vendors through a link provided in email notifications sent to them.
- Insightful dashboards containing valuable data is sent within seconds to the County Administrator, Department Directors, and other stakeholders who need to continuously monitor the progress throughout a procurement process.
**Figure No. 2: Global Configuration Menu Group – Activity Registration Page**

### Global Activity Registration

<table>
<thead>
<tr>
<th>No</th>
<th>Activity Type</th>
<th>Execute Level</th>
<th>Execute Type</th>
<th>Email Contents Template</th>
<th>Email Plan</th>
<th>Receiver Setting</th>
<th>Delete</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Send Email</td>
<td>Task</td>
<td>Task Assignment</td>
<td>ProcureTrack - Task Assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Send Email</td>
<td>Task</td>
<td>Task Status Notification</td>
<td>Task Status Notification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Send Email</td>
<td>Project</td>
<td>Task Expired</td>
<td>Project Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Send Email</td>
<td>Project</td>
<td>Project Created</td>
<td>Project [%PROJECTNAME%] Created</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Send Email</td>
<td>Task</td>
<td>Task Completion</td>
<td>Task Completion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Send Email</td>
<td>Project</td>
<td>Project Status Change</td>
<td>The status of the Project [%PROJECTNAME%] has changed.</td>
<td></td>
<td></td>
<td></td>
</tr>
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Global Activity Admin
Global Due Setting Admin
Global Process File Admin
Global Task Form Field Admin
Figure No. 3: Role & Permission Menu Group – Role Menu Access Registration Page
**Figure No. 4: Master Admin Menu Group – Email Contents Configuration Page**

<table>
<thead>
<tr>
<th>No</th>
<th>Assignment</th>
<th>ProcureTrack - Task Assignment</th>
<th>Task Assignment Notification to the task owner.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Assignment</td>
<td>ProcureTrack - Task Assignment</td>
<td>Task Assignment Notification to the task owner.</td>
</tr>
</tbody>
</table>

**Email Contents**

```
Dear [USERNAME],

Project Information: [PROJECTDETAILS]

Regarding [PROJECTNAME], the [TASKNAME] task is assigned to you and the due date of this task is [DUEDATE].

If you are the task's owner, please submit your task before the due date and ProcureTrack will send an warning notification before the expiration date. You can review the task using the link below:

[Link]

If you require assistance, please contact the ProcureTrack Team.

ProcureTrack Team, Purchasing Division
115 S. Andrews Avenue, Fort Lauderdale, FL 33301
Email: ProcureTrack@broward.org
Office: 954-357-6066
www.broward.org/Purchasing
```
Figure No. 5: Master Template – Master Template for RFP Process
Figure No. 6: Master Template – Task Registration & Configuration
Figure No. 7: RFP Request Page

<table>
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<tr>
<th>Process Name</th>
<th>RFP</th>
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</thead>
<tbody>
<tr>
<td>Process Description</td>
<td>Request for Proposals</td>
</tr>
<tr>
<td>Requestor</td>
<td>Se Yeon Hwang, <a href="mailto:syhwang@broward.org">syhwang@broward.org</a>, 954-261-5404</td>
</tr>
<tr>
<td>Using Agency Division</td>
<td>PURCHASING</td>
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<table>
<thead>
<tr>
<th>1</th>
<th>Title</th>
<th>Please provide project title.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Detail</td>
<td>Please provide project detail information.</td>
</tr>
<tr>
<td>3</td>
<td>Estimated Amount</td>
<td>Please provide project estimated amount.</td>
</tr>
<tr>
<td>4</td>
<td>Supervisor</td>
<td>Please provide your supervisor information.</td>
</tr>
<tr>
<td>5</td>
<td>County Attorney</td>
<td>Please provide a County Attorney from your agency for this project.</td>
</tr>
<tr>
<td>6</td>
<td>Document Upload</td>
<td>Please upload any file related to this project.</td>
</tr>
</tbody>
</table>

Upload Required File Type: Scope of work
Figure No. 8: Actual tasks and milestones for the RFP Project
### Figure No. 9: Resource Assignment & Mapping

<table>
<thead>
<tr>
<th>No</th>
<th>Resource Name</th>
<th>Resource Desc</th>
<th>User Name</th>
<th>Update</th>
<th>Delete User</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Using Agency</td>
<td>Requester</td>
<td>Se Yeon Hwang</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>2</td>
<td>County Administration</td>
<td></td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Budget</td>
<td></td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>County Attorney</td>
<td>Purchasing County Attorney</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Risk</td>
<td>Risk Management</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Purchasing</td>
<td>Purchasing Agent</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PLCPD</td>
<td>ENVIRONMENTAL LICENSING &amp; BUILDING PERMITTING</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>OESBD</td>
<td>OFFICE OF ECONOMIC &amp; SMALL BUSINESS DEVELOPMENT</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>UAD</td>
<td>Using Agency Director</td>
<td>BRENDA BILLINGSLEY</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>10</td>
<td>UADP</td>
<td>Using Agency Department Director</td>
<td>George Taback</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>11</td>
<td>PUD</td>
<td>Purchasing Director</td>
<td>BRENDA BILLINGSLEY</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>12</td>
<td>PUM</td>
<td>Purchasing Manager</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>FASD</td>
<td>Finance and Administrative Services Department Director</td>
<td>George Taback</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>14</td>
<td>UA County Attorney</td>
<td>Using Agency County Attorney</td>
<td>GLENN MILLER</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>15</td>
<td>UA Supervisor</td>
<td>Using Agency Requestor Supervisor</td>
<td>Laniel Rameus</td>
<td>Update User</td>
<td>Delete User</td>
</tr>
<tr>
<td>16</td>
<td>PURFP</td>
<td>Purchasing Person For RFP</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Requisition Reviewer</td>
<td>Requisition Reviewer</td>
<td></td>
<td>Update User</td>
<td></td>
</tr>
</tbody>
</table>
**Figure No. 10: Resource Assignment & Mapping – Active User search by County LDAP Connection**

<table>
<thead>
<tr>
<th>No</th>
<th>Resource Name</th>
<th>First Name</th>
<th>Last Name</th>
<th>Title</th>
<th>Email Addr</th>
<th>Division</th>
<th>IsExistingUserA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Using Agency</td>
<td>Glenn</td>
<td>Lueck</td>
<td>PARKS AIDE</td>
<td><a href="mailto:GLUECK@broward.org">GLUECK@broward.org</a></td>
<td>Parks &amp; Recreation</td>
<td>✔</td>
</tr>
<tr>
<td>2</td>
<td>County Administration</td>
<td>Glenn</td>
<td>Klein</td>
<td>LIBRARY AIDE</td>
<td><a href="mailto:Gklein@broward.org">Gklein@broward.org</a></td>
<td>Libraries</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>County Attorney</td>
<td>Glenn</td>
<td>WILTSHERE</td>
<td>DEP DIR PORT EVERGLADES</td>
<td><a href="mailto:GWILTSHERE@broward.org">GWILTSHERE@broward.org</a></td>
<td>Port Everglades</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>UAD</td>
<td>Glenn</td>
<td>AMORUSO</td>
<td>PLANNER SENIOR</td>
<td><a href="mailto:GAMORUSO@broward.org">GAMORUSO@broward.org</a></td>
<td>UPR: Housing&amp;Comm Dev</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>FUD</td>
<td>Glenn</td>
<td>VOELTNER</td>
<td>INFO TECHNOLOGY SPEC</td>
<td><a href="mailto:GVOELTNER@broward.org">GVOELTNER@broward.org</a></td>
<td>Enterprise Tech Svs</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>UADP</td>
<td>Glenn</td>
<td>MILLER</td>
<td>ASST COUNTY ATTORNEY</td>
<td><a href="mailto:GMILLER@broward.org">GMILLER@broward.org</a></td>
<td>County Attorney</td>
<td>✔</td>
</tr>
<tr>
<td>7</td>
<td>Requisition Reviewer</td>
<td>Glenn</td>
<td>MCCORMICK</td>
<td>GRANTS SPECIALIST</td>
<td><a href="mailto:GMCCORMICK@broward.org">GMCCORMICK@broward.org</a></td>
<td>Intergov Affairs</td>
<td></td>
</tr>
</tbody>
</table>
Figure No. 11: Email notification for a Task
Figure No. 12: Task Submission Page

Task Submission Page

Task Name: Adjust Task Schedules & Agree To Process - Purchasing

Task Description

Task Owner: Carolyn Messersmith, CMESSERSMITH@broward.org, 357-5857, Purchasing Agent

Due Date: 2/8/2017

1. Link Procurement: [Link Procurement]

2. Upload File: [Select]

Please click the link left to review & adjust task schedule. Once you complete please come back this page and click the Complete Task button below. Please upload any file related to this task.

Task Information

Note

Task History

File Information

Task Date History

Add new record

No

Note Title

Note

Created By

Created

No records to display.

Project Information

Project History

Project Information

Resource User Information

No

Status

Updated Time

1

Request Created

2/8/2017 2:53:27 PM

Go Back To TaskList Page
Figure No. 13: Task Scheduler update after completion of the task

<table>
<thead>
<tr>
<th>Title</th>
<th>Start Date</th>
<th>End Date</th>
<th>Duration (Days)</th>
<th>Assigned Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request For Proposals (RFP)...</td>
<td>02/06/17</td>
<td>02/12/17</td>
<td>229</td>
<td></td>
</tr>
<tr>
<td>Project Setup (20 to 26 buns)</td>
<td>02/06/17</td>
<td>02/22/17</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Submit Scope (E-Form: A...</td>
<td>02/06/17</td>
<td>02/07/17</td>
<td>1</td>
<td>Using Agency [...]</td>
</tr>
<tr>
<td>Professional Service Sect...</td>
<td>02/06/17</td>
<td>02/07/17</td>
<td>1</td>
<td>Requisition Rev...</td>
</tr>
<tr>
<td>Adjust Task Schedules &amp; A...</td>
<td>02/06/17</td>
<td>02/14/17</td>
<td>5</td>
<td>Using Agency [...]</td>
</tr>
<tr>
<td>Adjust Task Schedules &amp; A...</td>
<td>02/07/17</td>
<td>02/06/17</td>
<td>1</td>
<td>Purchasing [10...</td>
</tr>
<tr>
<td>Resource Assignment (Us...</td>
<td>02/14/17</td>
<td>02/20/17</td>
<td>3</td>
<td>Purchasing [10...</td>
</tr>
<tr>
<td>Setup Pre-Solicitation Meet...</td>
<td>02/20/17</td>
<td>02/23/17</td>
<td>3</td>
<td>Purchasing [10...</td>
</tr>
<tr>
<td>Pre_Solicitation Project Str...</td>
<td>02/23/17</td>
<td>03/06/17</td>
<td>9</td>
<td>Purchasing [10...</td>
</tr>
<tr>
<td>Pre-Advisement Meet...</td>
<td>03/08/17</td>
<td>03/06/17</td>
<td>0</td>
<td>Purchasing [10...</td>
</tr>
<tr>
<td>Finalize Evaluation Criteria</td>
<td>03/09/17</td>
<td>03/22/17</td>
<td>10</td>
<td>Using Agency [...]</td>
</tr>
<tr>
<td>Submit Request for Goal A...</td>
<td>03/08/17</td>
<td>03/15/17</td>
<td>5</td>
<td>Using Agency [...]</td>
</tr>
<tr>
<td>Request Insurance Require...</td>
<td>03/08/17</td>
<td>03/15/17</td>
<td>5</td>
<td>Using Agency [...]</td>
</tr>
<tr>
<td>Issue OESBD Goal Memo...</td>
<td>03/15/17</td>
<td>03/22/17</td>
<td>5</td>
<td>OESBD [100 %]</td>
</tr>
<tr>
<td>Issue Insurance Require...</td>
<td>03/15/17</td>
<td>03/22/17</td>
<td>5</td>
<td>Risk [100 %]</td>
</tr>
</tbody>
</table>