

### Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for EOG
- Readiness Workplan

# EOG Status Report Dashboard

### Reporting Period

January - February 2024

### Agency Sponsor

Dawn Hanson

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

### CCN Composition



The Change Champion Network dial reflects the completeness of your CCN makeup.

#### Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 12
- Vacant Role = 0

### RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

#### RW Task Completeness:

- Score = 100.00%**
- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

### RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

#### RW Task Timeliness:

- Score = 98.26%**
- Submitted On Time = 19
- Submitted Late = 1
- Pending Submission = 0

### Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

#### Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

### RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	11/29/23			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/28/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/09/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	01/23/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/05/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

### People

The staff and stakeholders affected by your agency's transition to Florida PALM.

#### Implementation:

**Planned Florida PALM End Users = 8**

- Business Process Groupings = 13

**Role Mapping = TBD**

**Training = TBD**

### Processes

The sequence of procedures to accomplish a business objective.

#### Current-State:

**Cataloged Business Processes = 151**

- Related Business Systems = 1
- Related Reports = 41

**Documentation Status:**

- Complete = 150 Partial = 0 Not Started = 0

#### Implementation:

**Impacted Agency Business Processes = TBD**

### Technology

The applications or tools used to process, track, or report on financial operations.

#### Current-State:

**Cataloged Business Systems = 1**

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 1

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

**Cataloged Interfaces = 0**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

### Data

Information used in or produced from an agency's financial business operations.

#### Current-State:

**Unique FLAIR Data Elements = 70**

• **Associated Unique Uses = 77**

- Continued Use - Yes = 30

- Continued Use - No = 26

• **Associated Business Systems = 1**

**Cataloged Reports = 146**

• **Criticality:**

- High = 39 Med = 39 Low = 62 None = 6

**Implementation:**

**Business Systems Planned for Integration = 1**

**Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 1

**Segment II - Documentation Updates: TBD**

**Planned Interfaces = 0**

- Inbound Interfaces = 0  
- Outbound Interfaces = 0

**Implementation:**

**Configuration Workbooks = TBD**

**Conversions = TBD**

**Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**EOG Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes Technology Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	Open	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries.	No change.	10/31/23	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process.	No change.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources.	Open	4 (Medium/Medium)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant.	Open	4 (Medium/Medium)	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vochered.	No change.	01/23/24	Kelley Sasso
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	No change.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need.	No change.	10/31/23	Kelley Sasso
Technology	Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open	1 (Low/Low)	No risks determined at this time.	No change.	10/31/23	Kelley Sasso
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso

**EOG Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**EOG Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	01/23/24	All Administrative Services.	Discussed with D. Thomas on 1/19/2024.

### EOG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

#### Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

**Agency Sponsor Name: \***

**Confirm \***

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#### EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/05/24
November - December 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/11/24
September - October 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/23
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23