

**Helpful Links**

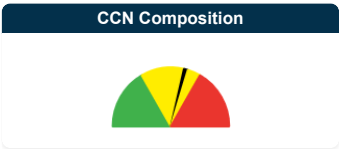
- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for FDLE
- Readiness Workplan

# FDLE Status Report Dashboard

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

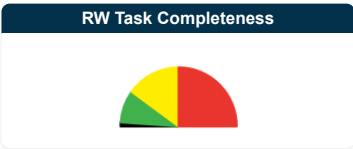
**Reporting Period**  
January - February 2024

**Agency Sponsor**  
Charlotte Fraser



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

- Change Champion Network:**
- Unique Filled Role = 4
  - Duplicate Filled Role = 9
  - Vacant Role = 1



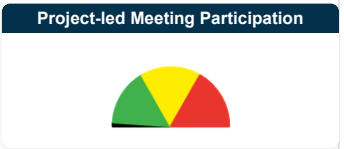
The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

- RW Task Completeness:**
- Score = 100.00%**
- Submitted Complete = 1
  - Submitted Incomplete = 0
  - Completed After Submission = 0



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

- RW Task Timeliness:**
- Score = 100%**
- Submitted On Time = 20
  - Submitted Late = 0
  - Pending Submission = 0



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

- Meeting Participation:**
- Meetings Attended = 8
  - 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	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24	Following the Segment II meetings, we will be scheduling internal meetings with SMEs to go through each narrative and flow individually.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24	We have started process for advertising/interviewing/hiring for Program Manager, Project Manager, Oracle EBS Functional Lead, and Oracle EBS Technical Lead. Currently working on physical hardware replacement, hardware Operating System upgrade from RHEL6 to RHEL7, and Oracle EBS application upgrade from R12.2.9 to R12.2.12. These all are pre-requisites before we can initiate code changes related to PALM.		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24	Production Support Contacts - IDP SME (backup) is left vacant because it's the helpdesk, not a specific person.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/12/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		

**People**

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

**Processes**

The sequence of procedures to accomplish a business objective.

**Technology**

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

**Data**

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

**Implementation:**

Planned Florida PALM End Users = 39

• Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

**Current-State:**

Cataloged Business Processes = 279

• Related Business Systems = 15

• Related Reports = 57

• Documentation Status:

- Complete = 199 Partial = 44 Not Started = 38

**Implementation:**

Impacted Agency Business Processes = TBD

**Current-State:**

Cataloged Business Systems = 21

• Criticality:

- High = 14 Med = 0 Low = 0 None = 7

• Documentation Status:

- Complete = 2 Partial = 10 Not Started = 7

Cataloged Interfaces = 46

- Inbound Interfaces = 24

- Outbound Interfaces = 22

**Implementation:**

Business Systems Planned for Integration = 16

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 3 Not Started = 0 Not Needed = 13

• Segment II - Documentation Updates: TBD

Planned Interfaces = 4

- Inbound Interfaces = 4

- Outbound Interfaces = 0

**Current-State:**

Unique FLAIR Data Elements = 73

• Associated Unique Uses = 193

- Continued Use - Yes = 68

- Continued Use - No = 108

• Associated Business Systems = 11

Cataloged Reports = 123

• Criticality:

- High = 97 Med = 14 Low = 45 None = 22

**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.

**FDLE Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology	The new "Account" COA field will be replacing the GL and Object codes. Specifications for how to crosswalk GL and object codes to account in PALM needed for system remediation.	Open	6 (High/Medium)	Once information is relayed from PALM, we will have to analyze how this will affect remediation of RAMS.	Review and crosswalk Accounts provided for Revenue and Expenditure	10/31/23	Terri Speed / Ajay Katta
Data	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Open	4 (Medium/Medium)	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	None	07/01/23	Mike Moore
Technology	Development and Test instances of affected agency business systems are not available.	Open	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring	07/01/23	Andrew Gutsch
People	If funding is not approved, we will be unable to hire/retain additional technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire/retain staff required to complete the project.	Awaiting close of FY 24/25 legislative session.	08/01/23	Becky Bezemek / Charlotte Fraser
Technology Data	FDLE uses Object code for various purposes. PALM is replacing this with Account. As a result it will be challenging to reconcile RAMS with PALM and get details at transaction type level.	Open	3 (High/Low)	New chart of accounts and transaction types have to be setup to fulfill PALM and FDLE accounting requirements.	Analyzing PALM account codes provided to determine if additional fields need to be utilized.	10/31/23	Terri Speed / Andrew Gutsch
Processes Technology Data	New hardware, hardware OS and EBS application upgrade will not be completed as planned	Open	3 (High/Low)	Coordinating with multiple teams and testing extensively on all the new instances to ensure upgrade project is completed.	Oracle EBS system (RAMS) hardware and software upgrade is work in progress	02/29/24	Andrew Gutsch
People Processes Technology	Current systems have high visibility and are available to end customers 24/7. There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	2 (Medium/Low)	Project Manager will identify cutover schedule for all affected applications and provide detailed plans much before PALM go-live date.	Pending Project Manager being hired	10/31/23	Andrew Gutsch
People	New consultants and existing team do not have much knowledge of PALM and its impact.	Open	2 (Medium/Low)	Project Manager will need a plan to update everyone on PALM technical and functional features based on which teams can prepare.	Pending Project Manager being hired	10/31/23	Andrew Gutsch

**FDLE Issues**

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

**FDLE 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	The agency will be approved for funding to support readiness activities.	Logged	07/01/23	Office of Information and Technology Systems Office of Financial Management Agency business systems	Pending FY 24/25 Legislative Session
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.	Logged	07/01/23	Agency business systems	Monitor information as provided by PALM.
Data	PALM will provide similar functionality as ABS Open Reports which is used for querying FLAIR and PYRL data so that we can retire those applications.	Logged	09/01/23	Office of Financial Management Office of Policy and Planning All divisional/regional business liaisons Management	Monitor information as provided by PALM.
People Processes Technology Data	PALM will provide significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT).	Logged	10/31/23	All agency business systems	Monitor information as provided by PALM.

**FDLE Agency-Specific Readiness Activities**

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

People Technology Data	January's FDLE/PALM Readiness Touchpoint Meeting	01/25/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Six members attended for one hour and thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 514, 515, 516, 517, 518, and 519.	02/01/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 514, 515, 516, 517, 518, and 519.	02/08/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 513, 514, 515, 516, 517, 518, and 519.	02/22/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Five members attended for thirty minutes.
People Technology Data	February's FDLE/PALM Readiness Touchpoint Meeting	02/27/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Seven members attended for one hour.
People Technology Data	Change Champion Network Town Hall	02/29/24	Office of Financial Management Office of Information Technology Services	To provide an opportunity for the Change Champion Networks and Project team to collaborate.	Six members attended for three hours.
People Technology Data	Thursday Task Talk - RW Task 513, 514, 515, 516, 517, 518, and 519.	02/29/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People	Interviews for ITS ERP Team Lead	01/04/24	Office of Financial Management Office of Information Technology Services	Interview contractors for ITS RAMS Functional consultant for PALM Project	3 members, 6 interviews, total of 9 hours for 1/4, 1/8, 2/7, 2/8, and 2/9.
People	Weekly Internal PALM Meeting	01/23/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Advisory Council	01/24/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Three members attended for two hours.
People	Weekly Internal PALM Meeting	01/30/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Weekly Internal PALM Meeting	02/06/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Weekly Internal PALM Meeting	02/12/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Onboard PALM Program Manager	02/15/24	Office of Financial Management	Meet with new PALM Program Manager to discuss project duties, expectations, and roles	Three members for one hour.
People	Weekly Internal PALM Meeting	02/20/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Advisory Council	02/21/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Four members attended for two hours.
People	Initial COA Configuration Meeting	02/27/24	Office of Financial Management Office of Planning and Budget	To discuss required changes to Org Code and OCA and how this will affect reporting and current configuration methodology (task 513 - Complete Configuration Workbooks for Segments I and II).	Six members attended for one hour.
People	Interviews for PALM Project Manager	02/27/24	Office of Financial Management Office of Information Technology Services	Interview contractors for ITS PALM Project Manager position	3 members, 5 interviews, total of 7.5 hours for 2/27 and 2/28.
People	PALM Project Management Meeting	02/28/24	Office of Financial Management Office of Information Technology Services	To discuss roles and duties to be distributed between the Program Manager and IT Project Manager	Three members for 1 hour.
People	Weekly Internal PALM Meeting	02/29/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People Processes	Payroll Meeting - BPMs Review 100.1 - Set Up and Maintain Positions 100.2 - Set Up and Maintain Employees	01/04/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Five members attended for one hour.
People Processes	Disbursements Management - Segment II Design Workshops	01/10/24	Office of Financial Management	Review BPMs, interface layouts, and reports to process/manage payments.	Two members attended for eight hours.
People Processes	Asset Accounting and Management - Segment II Design Workshops	01/11/24	Office of General Services	Review BPMs, interface layouts, and reports to acquire and set up assets / set up and maintain asset controls.	Two members attended for eight hours.
People Processes	Payroll Meeting - BPMs Review 100.3 - On Cycle Payroll Run 100.4 - Off Cycle Payroll Run	01/11/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Two members attended for eight hours.
People Processes	Disbursements Management - Segment II Design Workshops	01/12/24	Office of Financial Management	Review BPMs, interface layouts, and reports to establish and maintain encumbrances.	Two members attended for eight hours.
People Processes	Contracts & Grants Management System Access & Controls - Segment II Design Workshops	01/17/24	Office of Financial Management	Review BPMs, interface layouts, and reports to create and maintain contracts/grants and interface error handling process.	Two members attended for eight hours.
People Processes	Account Management and Financial Reporting - Segment II Design Workshops	01/18/24	Office of Financial Management	Review BPMs, interface layouts, and reports to enter and process journals.	Two members attended for eight hours.
People Processes	Payroll Meeting - BPMs Review 100.5 - Ad Hoc Payroll 100.6 - Payroll Adjustments 100.7 - Payroll Accounting Distributions 100.8 - End of Period Processing	01/24/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Three members attended for one hour.
People Processes	Disbursements Management - Segment III Financial Wave BPM Review	02/12/24	Office of Financial Management	Review BPMs, interface layouts, and reports to set up/maintain suppliers and enterprise process vouchers (pcard).	Four members attended for three hours and thirty minutes. Two members watched virtually.
People Processes	Asset Accounting and Management - Segment III Financial Wave BPM Review	02/12/24	Office of General Services	Review BPMs, interface layouts, and reports to deploy and maintain assets.	Three members attended for three hours and thirty minutes.
People Processes	Account Management and Financial Reporting - Segment III Financial Wave BPM Review	02/13/24	Office of Financial Management	Review BPMs, interface layouts, and reports to perform month end close.	Four members attended for three hours and thirty minutes. One member watched virtually.
People Processes	Thursday Task Talk RW Task 513 - Complete Configuration Workbooks for Segments I and II	02/15/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Five members attended for thirty minutes.
People Processes Technology	Account Receivables - Segment II Design Workshops	01/16/24	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports to deposit and apply receipts.	Two members attended for eight hours.
People Processes Technology	Revenue Accounting / Accounts Receivables / Grants Management - Segment III Financial Wave BPM Review	02/13/24	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports to set up/maintain customers, enter/maintain receivables, AR deposits, and monitor CMIA.	Four members attended for three hours and thirty minutes. Four members watched virtually.

Technology	Upgrade of Oracle EBS Application and Hardware Meeting	02/29/24	Office of Information Technology Services	To upgrade - --> Oracle EBS application from R12.2.9 to R12.2.12. --> Hardware OS from RHEL7 to RHEL8 --> Replace existing Hardware	Upgrade of application and hardware will enable FDLE to work on latest version of application for all PALM related software customizations and also ensure work is done on supported hardware with necessary licenses.
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### 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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### FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/11/24
November - December 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	01/12/24
September - October 2023	Mike Moore	mikemoore@fdle.state.fl.us	11/13/23
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23