LEG 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

Lisa Swindle

CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation
The Change Champion Network dial reflects the completeness of your CCN makeup.	The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.	The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.	The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

• Unique Filled Role = 12

• Duplicate Filled Role = 10

• Vacant Role = 0

RW Task Completeness:

Score = 100.00%

• Submitted Complete = 1

• Submitted Incomplete = 0

• Completed After Submission = 0

RW Task Timeliness:

Score = 90%

• Submitted On Time = 13

• Submitted Late = 7

• Pending Submission = 0

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	01/23/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/23/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/23/24			
	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	02/26/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/23/24	Subject to Change depending on Reports distribution and scheduling details, and personnel changes. Details in SmartSheet "Leg -Identify Future FL PALM End Users"	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		Will not be able to complete AM configuration worksheets due to Solaris requirement. We do not have Solaris access and our locations are not in Solaris.		
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	02/15/24	Made two updates: Technical Lead Catina York OLITS and Laura Brown, General Services (Property) from "Editor Cannot Share" Access to "Editor Can Share" Access so they can add team members to SmartSheets as needed.		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/04/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

People

Implementation:

Planned Florida PALM End Users = 54

• Business Process Groupings = 10

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 119

• Related Business Systems = 13

• Related Reports = 24

• Documentation Status:

Technology

Current-State:

Cataloged Business Systems = 16

• **Criticality:**

- High = 10 Med = 1 Low = 1 None = 1

• **Documentation Status:**

Data

Current-State:

Unique FLAIR Data Elements = 105

• **Associated Unique Uses = 106**

- Continued Use - Yes = 14

- Continued Use - No = 0

- Complete = 119 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

- Complete = 12 Partial = 1 Not Started = 0

Cataloged Interfaces = 9

- Inbound Interfaces = 3

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 7

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 4

• Segment II - Documentation Updates: TBD

Planned Interfaces = 5

- Inbound Interfaces = 3

- Outbound Interfaces = 2

• **Associated Business Systems = 13**

Cataloged Reports = 77

• **Criticality:**

- High = 42 Med = 23 Low = 6 None = 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.

LEG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not posses, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hirer F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

LEG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

LEG 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 *

Submit

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Lisa Swindle	mentillo.mike@leg.state.fl.us	03/04/24
November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	01/12/24
September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	11/09/23
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date: