Helpful Links 夕 Dashboard Snapshots	DOS Status Re	Reporting Period July - August 2024					
夕 Knowledge Center 夕 Florida PALM Workbook for DOS 夕 Readiness Workplan	supporting information with	Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.					
CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation				
he 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:	RW Task Completeness:	RW Task Timeliness:	Meeting Participation:				
Unique Filled Role = 16	Score = 79.71%	Score = 74.12%	Meetings Attended = 10				
Duplicate Filled Role = 0	Submitted Complete = 22	Submitted On Time = 21	Meetings Missed = 0				
Vacant Role = 0	Submitted Incomplete = 4	Submitted Late = 28					
	Completed After Submission = 8	 Pending Submission = 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	asks - Coi	npleted or Open Ite	ems			
Project mpact	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
I/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	08/12/24		Submission Incomplete	
I/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	08/12/24		Submission Incomplete	
I/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/30/24		Submission Complete	
ndirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	06/20/24		Submission Complete	
I/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	08/30/24	Currently reviewing current data to assess cleansing need.	Submission Complete	
ndirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
I/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	06/20/24		Submission Complete	
I/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	08/30/24		Submission Complete	
ndirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	100% - Submitted	08/30/24	The Department of State (DoS) has organized End Users, Change Champions, and Subject Matter Experts into three distinct groups, each with its own communication channels, meetings, and charters that outline the vision and purpose for each group as we enter User Acceptance Testing (UAT). Additionally, sandbox access is being promoted to all end users, who are also being asked to maintain their work to serve as testing scripts once DoS moves into UAT.	Submission Complete	
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/30/24		Submission Complete	
I/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/15/24		Submission Complete	
I/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	100% - Submitted	08/30/24		N/A	
√A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/18/24	Arranged biweekly meetings with end- users, framing the first one as kick-off sessions, held on 7/15. Schedule monthly meetings with subject matter experts (SMEs) and the CCN team. All groups include key stakeholders, who will participate as end-users, SMEs, and CCN members.		
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	07/24/24	Not applicable.	Submission Complete	09/03/24
/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/03/24
I/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Incomplete	09/05/24
I/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/05/24
lirect	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/05/24
irect	Technology	545-B	Update and Finalize Florida PALM Conversion Inventory for Segment IV - Projects (PCC001)	07/22/24	08/23/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	08/30/24
lirect	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	07/24/24	Not applicable.	Submission Complete	
N/A	Technology	547	Remediate Agency Business Systems	07/22/24	12/13/24	100% - Submitted	07/24/24	Not applicable.	Submission	

			based on Segment III						Complete	
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/26/24	DOS will not be using ABS which will require planned interfaces.	Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/30/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24	50% - In Progress				
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/11/24	The agency sponsor is currently out on travel and has delegated authority for the backup sponsor to submit on her behalf.	Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	75% - Consolidating/Inputting Information for Submission			N/A	

People

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

Implementation:

Planned Florida PALM End Users = 16

Business Process Groupings = 10/13

Identified Subject Matter Experts = 7

SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 2

Accounts Receivable = 2Asset Accounting and Mgmt. = 0

- Banking = 2

Budget Mgmt. and Cash Control = 2Contracts Mgmt. = 1

- Disbursements Mamt. = 3

- Grants Mgmt. = 1

- Inter/IntraUnit Transactions = 2

- Payroll Mgmt. = 1

- Projects Mgmt. = 1

- Revenue Accounting = 2

- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

Critical Operational

Critical Operational

Elements

Flements

Risk Description

Issue Description

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 10

Related Business Systems = 1

Related Reports = 21

Documentation Status:

- Complete = 7 Partial = 2 Not Started = 1

Implementation:

Impacted Agency Business Processes = 10

Related Business Process Groupings = 5
 Planned Spreadsheet Uploads = 0

Level of Impact: People Changes

- High = 0 Medium = 0 Low = 1 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 1 None = 0 Uncertain = 0

Level of Impact: Technology Changes
 High = 0 Medium = 0 Low = 0 None = 1

Uncertain = 0

Level of Impact: Data Changes
 High = 0 Medium = 0 Low = 0 None = 1

Uncertain = 0

Segments I & II Documentation Update
Status

- Not Started = 9 In Progress = 0 Complete = 0

Segment III Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Risk Rating

Status

Priority

Status

Technology

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

Current-State:

Cataloged Business Systems = 4

Criticality:

High = 1 Med = 0 Low = 0 None = 1
Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

- complete - o rantal - o Not Started - o

Cataloged Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Segment III - Documentation Updates:
 Complete = 0 Updating = 0 Evaluating = 0

Not Started = 0 Not Needed = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

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.
DOS Risks

Mitigation/Response Strategy

DOS Issues

Resolution Plan

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 67

- Associated Unique Uses = 138
- Continued Use Yes = 0
- Continued Use No = 0

Associated Business Systems = 2

Cataloged Reports = 241

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

Implementation:

Segments I & II Planned Configurations = 6/9

- Accounts Receivable (AR)
- Planned Distribution Codes = 3
- Asset Management (AM)
- Planned Location Codes = 33
- Planned Associated Area ID's = None
- Commitment Control (KK)

- Planned Option = Option # 1 - Track with Budget

General Ledger (GL)

 Planned Budgetary Value Combo Edits = 498

- Planned Local Funds = None
- Planned Organization ID's = 144

Planned OA1's = 36
 Planned OA2's = None

Segment IV Planned Configurations

- Started = 1 Not Started = 1

Conversions & Data Readiness

Conversions Needed = 8

 Agency Data Outside of Primary Source System(s) = 0

Data Readiness/Cleansing Status:

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Owner / Coordinator

Owner /

Coordinator

Reports = TBD

Date of

Status

Change

Planned or

Resolution Date

Actual

Reporting Period

Comments or Updates

Reporting Period

Comments or Updates

People Technology	Smartsheet's automation are assigning exclusive work to executives via the Change Champion Network list. Assigning tasks meant for role players to executives can lead to misallocation of resources.	Closed	Low - All impacts not listed as Critical or High	Communicated the issue with the Readiness Coordinators and two supervisors, Antonio and Scott.		07/15/24	Marc Weeks
People	End users have refined processes and a strong affinity for FLAIR. The current sentiment is, "Why fix if it it is it for broken?" I believe this could also be an issue within other organizations and state departments.		Low - All impacts not listed as Critical or High	Set as an agenda item with the change champion network, this issue will be an ongoing challenge.		12/31/24	Marc Weeks
Processes	The sandbox environment lacks segregation from the production environment. Consultants need to see what end users see, but since the sandbox and production environments are the same, this creates a legitimate security concern.	Open	Low - All impacts not listed as Critical or High	Contacted DFS readiness coordinators about this matter, which is actually more of a user story than an issue.		07/29/24	Marc Weeks
Processes	The SAM (Security Access Manager) for PALM, previously an undesignated position under FLAIR, has now been identified and will transition within the Department of State's Administrative Services from Accounting to IT.	Open	Low - All impacts not listed as Critical or High	A meeting has been scheduled with the two different positions to coordinate the handoff and, with any luck, ensure a smooth transition for end users when UAT goes live. SAMs will be included in the CCN as a kind of subcommittee.	For the readiness coordinators: Other state organizations might be overlooking this issue—just a thought.	08/19/24	Marc Weeks

	DOS Assumptions								
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates				
Processes	Many of the tasks involve properly identifying work process flows. While we are working hard to identify these issues, it is assumed that many of them will be properly identified during UAT.	Logged	07/29/24	Current agency F&A staff					

			DOS Agenc	y-Specifi	c Readiness Activities			
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objecti	ve	Re	Reporting Period Comments or Updates	
	Agency Sponsor Co	onfirmatio	n			DOS Status	Report Confirmation	
					Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
As Agency Spo	onsor, I understand my role and respons	sibility for m	ionitoring and reporting		July - August 2024	Antonio Murphy	antonio.murphy@dos.myflorida.com	09/11/24
on my agend	y's readiness status. I have reviewed a agency's readiness status as reflected	hboard.		May - June 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	07/15/24	
	-g,				March - April 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	05/14/24
Agency Spons	or Name: *				January - February 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	03/08/24
Confirm *								
	Privacy Notice Report /	Abuse		•				