

**Helpful Links**

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- Florida PALM Workbook for EOG
- Readiness Workplan

# EOG 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**

July - August 2024

**Agency Sponsor**

Dawn Hanson

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 5
- 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 = 99.66%**
- Submitted Complete = 28
  - Submitted Incomplete = 0
  - Completed After Submission = 1

**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 = 99.23%**
- Submitted On Time = 49
  - 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 = 8
- Meetings Missed = 2

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
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/06/24		Submission Complete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/06/24		Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	06/06/24		Submission Complete	
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	06/06/24		Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	06/06/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	06/06/24		Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	08/02/24		Submission Complete	
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	100% - Submitted	08/08/24		Submission Complete	
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/02/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	100% - Submitted	07/02/24		N/A	
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/17/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/29/24		Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/03/24			
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24					
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24					
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24					
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/23/24		Submission Complete	
Direct	Technology	545-B	Update and Finalize Florida PALM Conversion Inventory for Segment IV - Projects (PCC001)	07/22/24	08/23/24	100% - Submitted	08/23/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24					
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24					
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/12/24		Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/23/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24					
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24					
Direct	Technology	550-A	Provide Public IP Address and Select Technical Meeting Time	08/26/24	08/30/24	100% - Submitted	08/30/24	meeting scheduled by Pete for 9/7 at 1:30	Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/09/24			

N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24			N/A
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/06/24	N/A

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.
<p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 8</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Identified Subject Matter Experts = 4</b></p> <ul style="list-style-type: none"> <li>SMEs by Business Process Grouping</li> <li>Account Mgmt. and Financial Reporting = 2</li> <li>Accounts Receivable = 2</li> <li>Asset Accounting and Mgmt. = 1</li> <li>Banking = 1</li> <li>Budget Mgmt. and Cash Control = 2</li> <li>Contracts Mgmt. = 1</li> <li>Disbursements Mgmt. = 3</li> <li>Grants Mgmt. = 1</li> <li>Inter/IntraUnit Transactions = 3</li> <li>Payroll Mgmt. = 2</li> <li>Projects Mgmt. = 1</li> <li>Revenue Accounting = 2</li> <li>System Access and Controls = 1</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 151</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 1</li> <li>Related Reports = 41</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 151 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 151</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 13</li> <li>Planned Spreadsheet Uploads = 1</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 8 Medium = 29 Low = 33 None = 10 Uncertain = 3</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 16 Medium = 29 Low = 27 None = 10 Uncertain = 3</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 0 Low = 0 None = 83 Uncertain = 2</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 28 Medium = 34 Low = 17 None = 6 Uncertain = 0</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 69</li> </ul> <p><b>Segment III Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 20</li> </ul>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 1</b></p> <ul style="list-style-type: none"> <li>Criticality:</li> <li>High = 0 Med = 0 Low = 0 None = 1</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 0 Partial = 0 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 1</b></p> <ul style="list-style-type: none"> <li>Segment I - Documentation Updates:</li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1</li> <li>Segment II - Documentation Updates:</li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1</li> <li>Segment III - Documentation Updates:</li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1</li> </ul> <p><b>Planned Interfaces = 1</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = -1</li> <li>Outbound Interfaces = 1</li> </ul>	<p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 70</b></p> <ul style="list-style-type: none"> <li>Associated Unique Uses = 77</li> <li>Continued Use - Yes = 30</li> <li>Continued Use - No = 26</li> </ul> <p><b>Associated Business Systems = 1</b></p> <p><b>Cataloged Reports = 146</b></p> <ul style="list-style-type: none"> <li>Criticality:</li> <li>High = 39 Med = 39 Low = 62 None = 6</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 7/9</b></p> <ul style="list-style-type: none"> <li>Accounts Receivable (AR)</li> <li>Planned Distribution Codes = 2</li> <li>Asset Management (AM)</li> <li>Planned Location Codes = 97</li> <li>Planned Associated Area ID's = 415</li> <li>Commitment Control (KK)</li> <li>Planned Option = Option # 1 - Track with Budget</li> <li>General Ledger (GL)</li> <li>Planned Budgetary Value Combo Edits = 381</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 68</li> <li>Planned OA1's = 105</li> <li>Planned OA2's = None</li> </ul> <p><b>Segment IV Planned Configurations</b></p> <ul style="list-style-type: none"> <li>Started = 2 Not Started = 0</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 11</li> <li>Agency Data Outside of Primary Source System(s) = 0</li> </ul> <p><b>Data Readiness/Cleansing Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 2</li> </ul> <p><b>Reports = TBD</b></p>

## 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	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources. Training is indicated as being conducted prior to go live in the July-December, 2025 timeframe. The July-Mid-Oct timeframe is the busiest of the year with most duties falling to a very limited number of staff.	Open	9 (High/High)	The EOG will monitor staff workload.	Updated upon review of timeline.	08/23/24	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. It was determined that many of the solutions initially discussed will not be able to be effectively implemented. We will continue to monitor and meet with the PALM team as the final design takes shape to determine the best methodologies for the differentiation of data.	Updated upon review of InterUnit Module Segment IV documentation.	08/23/24	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. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals.	No change.	10/31/23	Kelley Sasso
People Processes Data	Nomenclature is changing in from FLAIR terms to PALM terms. Some fields in PALM are named the same as in FLAIR but with different meanings/uses. Examples are category, asset location, etc. This will primarily be a training challenge; however, there exists the risk that procedures, guidelines, data, queries, etc will be misinterpreted or not updated properly.	Open	6 (Medium/High)	The EOG will work to highlight terminology/naming differences to mitigate risk of confusion.	No change.	06/06/24	Kelley Sasso
People Processes 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. Detailed risk outline in Line 007 relates to payment management. In reviewing Segment IV -Inter-Unit transactions, we noted that all receiving transactions may be rolled together with no ability to discern 'ownership' of the transaction since only OLO is required. Sent suggestions to the PALM team requesting addition fields be mandatory. Also requested that search menus be available on each workcenter screen to filter out unneeded transactions to only those relevant to DEM or EOG.	Open	6 (Medium/High)	The EOG has reported the issue and made suggestions to FL PALM as potential solutions.	New.	08/23/24	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/Medi)	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. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use.	Updated upon review of most recent configurations values worksheets.	06/06/24	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. The EOG will test PALM's inventory solution during UAT to determine if it will meet our agency's needs.	No change.	04/16/24	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 \***

EOG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/09/24
May - June 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	07/03/24
March - April 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	05/06/24
January - February 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/05/24