

Helpful Links

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

DACS 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

March - April 2024

Agency Sponsor

Alan Edwards

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- 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 = 7
- 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 = 100%**
- Submitted On Time = 30
- Submitted Late = 0
- 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 = 7
- 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
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/07/24			
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/11/24		Submission Complete	
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/08/24	Submitted 3/8/2024	Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/11/24		Submission Complete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24	Submitted on 3/11/2024		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	04/30/24			
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/19/24		Submission Complete	
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/07/24			
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

- Planned Florida PALM End Users = 603**
- Business Process Groupings = 13/13
- Role Mapping = TBD**

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

- Cataloged Business Processes = 190**
- Related Business Systems = 6
- Related Reports = 10

Technology

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

Current-State:

- Cataloged Business Systems = 49**
- **Criticality:**
- High = 27 Med = 13 Low = 6 None = 3

Data

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

Current-State:

- Unique FLAIR Data Elements = 70**
- **Associated Unique Uses = 70**
- Continued Use - Yes = 50

Training = TBD

• **Documentation Status:**
 - Complete = 190 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 190

• Related Business Process Groupings = 13
 - Planned Spreadsheet Uploads = 5

• **Level of Impact: People Changes**
 - High = 0 Medium = 15 Low = 28 None = 0
 Uncertain = 0

• **Level of Impact: Processes Changes**
 - High = 0 Medium = 23 Low = 20 None = 0
 Uncertain = 0

• **Level of Impact: Technology Changes**
 - High = 0 Medium = 20 Low = 23 None = 0
 Uncertain = 0

• **Level of Impact: Data Changes**
 - High = 0 Medium = 18 Low = 25 None = 0
 Uncertain = 0

• **Segments I & II Documentation Update Status**
 - Not Started = 0 In Progress = 0 Complete = 43

• **Documentation Status:**
 - Complete = 48 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

- Inbound Interfaces = 28
 - Outbound Interfaces = 14

Implementation:

Business Systems Planned for Integration = 16

• **Segment I - Documentation Updates:**
 - Complete = 3 Updating = 0 Evaluating = 0
 Not Started = 0 Not Needed = 12

• **Segment II - Documentation Updates:**
 - Complete = 5 Updating = 0 Evaluating = 0
 Not Started = 0 Not Needed = 10

Planned Interfaces = 21

- Inbound Interfaces = 2
 - Outbound Interfaces = 14

- Continued Use - No = 19

• **Associated Business Systems = 6**

Cataloged Reports = 221

• **Criticality:**
 - High = 85 Med = 56 Low = 17 None = 51

Implementation:

Configuration Workbooks

• **Segments I & II**
 - Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 4
 • Agency Data Outside of Primary Source System(s) = 0

• **Data Readiness/Cleansing Status:**
 - Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DACS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	There is a mismatch between the Interface Layout and sample data files provided by the PALM team. It means that the sample data files are inconsistent with the interface layout. As the result, many times it's not possible to develop and test the interfaces.	Open	9 (High/High)	For the purposes of testing the interface, the sample data file is manually modified to fit the interface layout so the interface process could be tested. However, it means this is no longer a true test.	Reviewed Monthly	04/22/24	Rosemarie Zubler

DACS Issues

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

DACS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	Funding for staff augmentation and services will continue through implementation and Hypercare.	Logged	08/31/23	Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM.	05/01/2024 - Continuing to monitor
Data	Division reporting needs currently handled by Data Warehouse will be taken care of by user roles for Information Warehouse or PALM reports.	Logged	12/19/23	Division fiscals, Finance and Accounting, OPB, Purchasing, Payroll	05/01/2024 - Will monitor as FL PALM releases additional information.
People	The Florida PALM team will be able to provide timely and complete requirements for the transition to Florida PALM with sufficient detail and time to implement the changes according to the Florida PALM schedule	Logged	11/13/23	FDACS PALM Readiness Team, CCN, all FDACS key stakeholders, PALM/impacted Agency Business System end users	05/01/2024 - Will monitor as FL PALM releases additional information.
Processes	Work efforts of staff augmentation resources are undertaken to collectively achieve a broader understanding of the totality of work that must be accomplished to meet all Critical Success Factors. As such, the deliverables outlined in the Operational Work Plan are critical, and the FDACS PALM Transition Readiness Team assumes that the deliverables are accurately and thoroughly defined and reflect the necessary Level of Effort to achieve all transition tasks and activities. Work efforts under the deliverables may adjust to accommodate operational variances, but the deliverables are fixed.	Logged	11/13/23	Staff Augmentation; FDACS PALM Readiness Team, CCN	05/01/2024 - Will continue to monitor.

DACS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	FLAIR Data Cleanup	03/01/24	Enterprise wide	To ensure clean records for current use and for conversion to PALM	Ongoing. Date entered reflects start of reporting period.
Data	Task 514 Data Cleanup Activities Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisors	Review and discuss agency data cleanup activities, status and task approach feedback and data cleansing plan for monitoring for conversions.	No other comments or updates.
Data	Task 524 FDACS End User Readiness Survey	04/29/24	F&A Bureau Chief and Assistant Chief, PALM Director, PALM Project Manager	Review and validate FDACS Implementation End Users within F&A; discuss expectations and scope for end user survey.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Grants Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Grants Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Encumbrances Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Disbursements and Travel Supervisors	Review and discuss agency data cleanup activities for Encumbrances; task status and task feedback.	No other comments or updates.

			and Travel Supervisors, Purchasing Supervisors		
Processes Data	Task 514 Data Cleanup - Customers Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Revenue Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Assets and Property Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Property and Financial Management Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 513 Configuration Workbooks Review Update	04/18/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisors	Review and discuss ongoing agency activities for Seg I and II Configuration Workbooks.	No other comments or updates.
People	PALM Planning Meeting	04/01/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager, Purchasing	Meeting to discuss the remaining PALM tasks, staff needs, data clean up identification and effort level, and team collaboration and partnership.	No other comments or updates.
People	PALM March 2024 Readiness Activities Review	04/01/24	OATS and Finance and Accounting	Meeting to discuss, clarify, and list the PALM Readiness activities that occurred during March 2024.	No other comments or updates.
People	PALM Task Status Update Meeting	04/01/24	OATS and Finance and Accounting	Meeting to discuss the status of the five PALM tasks due April 12, 2024.	No other comments or updates.
People	Review FDACS PALM Implementation Schedule	04/09/24	PALM Project Manager	Perform revisions and updates to the FDACS PALM Implementation Plan	No other comments or updates.
People	PALM Tasks Submission Review	04/12/24	PALM Project Manager, F&A PALM Director, and F&A Staff assistants	Meeting to review the instructions and completeness criteria for all PALM tasks due April 12, 2024	No other comments or updates.
People	Review Agency Communication Plan	04/16/24	F&A Bureau Chief and Assistant Chief, PALM Director	Reviewed agency Communications Plan for additional opportunities and methods for sharing PALM Updates	No other comments or updates.
People	PALM Workforce Readiness Plan Review	04/23/24	OATS, Finance & Accounting, Administration	Meeting to evaluate the FDACS PALM Workforce Readiness Plan, Review FDACS Implementation End User list, and review FDACS PALM Communication Plan.	No other comments or updates.
People	PALM Updates- Deeper Dive Information	04/26/24	OATS, PRT Developers, Application & Developer Director, PALM Project Manager	Review in greater detail the current PALM remediation and development work efforts.	No other comments or updates.
Processes	Process Review	03/01/24	Enterprise-wide	Ensure processes are as effective and efficient as possible for translation to PALM as appropriate	Ongoing. Date entered reflects start of reporting period.
Processes	DevOps Usage Meeting	03/04/24	OATS, PPMO, PRT	Meeting between PALM Project Manager, PPMO Manager, and Chief Technology Officer regarding the tracking of PALM Remediation activities	No other comments or updates.
Processes	PALM/PRT Business Operations	03/07/24	OATS, Admin, Finance and Accounting, PPMO, PALM Project Manager	Discussion and review of the FDACS bimonthly report and the process by which it is prepared, vetted, and updated.	No other comments or updates.
Processes	Task 515 Reviewed Agency Business Processes	04/04/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Revenue Supervisors	Reviewed documented Agency Business Processes under lens of current tasks to reevaluate thoroughness for current/future task expectations.	No other comments or updates.
Processes	Q4 PALM Request For Funds Review	04/08/24	OATS, PPMO, PALM Project Manager	Meeting to review the Q4 Request for PALM Funds	No other comments or updates.
Processes	FPSC Production Support RoundTable Prep Meeting	04/16/24	PALM Director, Agency SAMS	Reviewed current SAM process and procedures for agency; developed questions for Production Support Round Table.	No other comments or updates.
Technology	AIMS JAD Session 3	03/01/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review AIMS screens and reports impacted during remediation in the Admin process	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT,
Technology	Developer Working Session	03/04/24	OATS, FDACS PALM Remediation Team	Meeting with PALM Remediation Team's developers to discuss compilation of forms using WINSCP or PUTTY.	No other comments or updates.
Technology	REV JAD Session 2	03/06/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review REV screens and forms impacted during remediation	No other comments or updates.
Technology	PALM FDACS Sharepoint & Dashboard Review	03/07/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review draft Sharepoint Dashboard	No other comments or updates.
Technology	FDACS Draft Sharepoint/Dashboard Demo	04/05/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager	Meeting to present the draft Sharepoint/dashboard.	No other comments or updates.
Technology	FANS-AIMS Flair Testing Session	04/05/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager, FANS Technical Team	Session to test JSON file that will successfully load FANS data into AIMS	No other comments or updates.
Technology	Meeting with FDACS PALM Technical Liasion	04/09/24	PRT, PPMO, OATS	Meeting with PRT and Agency Technical Liasion to review Supplier details from PALM Segment III design workshop for AIMS Remediation	No other comments or updates.
Technology	FDACS PALM Monitoring Meeting	04/11/24	OATS, Admin, Finance and Accounting, PPMO	The purpose of this recurring meeting is for the team of internal FDACS resources to regroup and discuss project communications, project status, decision points, and review risks and issues.	Has occurred as needed. Date entered reflects last meeting occurrence of reporting period.
Technology	OR Code Information Gathering	04/15/24	PRT, PPMO, OATS, PALM Technical Liasion	Discussion to gather and compile a list of applications that use Organization(OR) codes for PALM Remediation at OATS Executive Management's request.	No other comments or updates.
Technology	Sprint Retrospectives and planning	04/16/24	PRT, OATS, Finance & Accounting	Conduct retrospective of ending sprint and plan for next sprint.	Occurs biweekly
Technology	AIMS Demo Mockup Presentation	04/17/24	PRT, PPMO, OATS, PALM Technical Liasion, Finance & Accounting, Administration, and Purchasing	A demo and presentation of a prototype created by combining the Items Details and Funds Codes screens in AIMS.	No other comments or updates.
Technology	PALM Biweekly Technical Meeting	04/18/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Remediation Team	Technical meeting with executive management giving a status update on what has been completed, what is currently being worked on with estimated completion dates, and what is on deck.	Occurs biweekly. Date entered reflects last occurrence
Technology	FANS to AIMS Status Meeting	04/18/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	The purpose of this recurring meeting is (1) FANS PALM Remediation status update (What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps (Goals for the next week)	Ongoing. Date entered reflects last meeting occurrence of reporting period.
Technology	PALM PRT Mid Sprint Planning	04/19/24	PRT, OATS, Finance & Accounting	A review of the current sprint's work and preview the next sprint's work items and activities.	Date entered reflects last occurrence.
Technology	COA Crosswalk Discussion	04/19/24	PRT Developers and PALM Project Managers	Meeting with PRT Developers regarding the status of COA Crosswalk deliverable for presentation to management.	No other comments or updates.
Technology	Weekly Touchpoint with CCN Technical Liasion	04/24/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	The purpose of this weekly meeting is to discuss any PALM technical updates, answer any questions from the PALM Remediation Team, and review any assistance needed.	Occurs weekly on Wednesdays. Date entered reflects last meeting occurrence of reporting period.
Technology	Weekly Summary Reporting	04/26/24	PRT, OATS, Finance &	Provide status of completed and ongoing PRT	Every Friday. Date entered reflects last occurrence. 9

			Accounting, Admin IT	deliverables/agency tasks; analyze implementation schedule progress; plan for next week	summaries during this reporting period.
Technology	Daily PRT Standups	04/30/24	PRT, Finance and Accounting, OATS, Admin IT	Conduct daily standups to provide update on technology tasks and deliverables, address risks, issues, assumptions, time exceptions, and blockers.	Occurs Daily. Date entered reflects last occurrence. 40 of these meetings have occurred during this reporting period. Work breakdown structure and deliverable progress monitoring; Project Management Liaison, Change Management Liaison,
Technology	Risks and Issue Management, monitoring Implementation Schedule, reviewing vacancies	04/30/24	PALM Management Workgroup	Consistently review and update Risks, Issues, Assumptions, Implementation Schedule, and vacancies	Primary: Project Management Liaison, Change Management Liaison Ongoing. Date entered reflects end of reporting period.

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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DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Alan Edwards	alan.edwards@fdacs.gov	05/08/24
January - February 2024	Alan Edwards	alan.edwards@fdacs.gov	03/11/24
November - December 2023	Alan Edwards	alan.edwards@fdacs.gov	01/11/24
September - October 2023	Alan Edwards	alan.edwards@fdacs.gov	11/09/23
July - August 2023	Alan Edwards	alan.edwards@fdacs.gov	09/11/23