FDLE Status Report Dashboard

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
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 = 4

• Duplicate Filled Role = 9

• Vacant Role = 1

RW Task Completeness:

Score = 80.00%

• Submitted Complete = 4

• Submitted Incomplete = 1

• Completed After Submission = 0

RW Task Timeliness:

Score = 96.88%

• Submitted On Time = 28

• Submitted Late = 0

• Pending Submission = 2

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	05/13/24			
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Remediation in progress.		
N/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	04/12/24	Remediation in progress.	Submission Incomplete	
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Remediation in progress.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
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	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	100% - Submitted	04/30/24	Task complete		
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	75% - Consolidating/Inputting Information for Submission		Survey administered; closes on 5.10.24. 5.3.24 Survey reminder sent. Survey extended by a day due to office closure on 5/10. Reminder sent to staff.		
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		Assigning and analyzing information for the task.		
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		Assigning and analyzing information for the task.		
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		Assigning and analyzing information for the task.		
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		Assigning and analyzing information for the task.		
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		Assigning and analyzing information for the task.		
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		Assigning and analyzing information for the task.		
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/08/24	Task complete		
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		Assigning and analyzing information for the task.		

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 = 40

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 276

• Related Business Systems = 14

• Related Reports = 59

• Documentation Status:

- Complete = 206 Partial = 36 Not Started = 36

Implementation:

Impacted Agency Business Processes = 276

• Related Business Process Groupings = 12

- Planned Spreadsheet Uploads = 3

• **Level of Impact: People Changes**

- High = 21 Medium = 80 Low = 28 None = 9 Uncertain = 6

• **Level of Impact: Processes Changes**

- High = 57 Medium = 57 Low = 15 None = 7 Uncertain = 8

• **Level of Impact: Technology Changes**

- High = 62 Medium = 22 Low = 12 None = 38 Uncertain = 7

• **Level of Impact: Data Changes**

- High = 81 Medium = 34 Low = 5 None = 10 Uncertain = 9

• **Segments I & II Documentation Update Status**

- Not Started = 116 In Progress = 2 Complete = 0

Technology

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:**

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

Planned Interfaces = 3

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

• **Segments I & II**

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

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

• **Data Readiness/Cleansing Status:**

- Complete = 1 In Progress = 1 Not Started = 1 Not Applicable 0

Reports = 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	Lack of understanding and process for granting and rescinding PALM access to the entire agency workforce who would need to access salary documents previously housed in Employee Information Center (EIC).	Open	6 (Medium/High)	Mitigate this risk.	Researching how to best resolve.	04/29/24	Terri Speed
Processes Technology	The new "Account" COA field will be replacing the GL and Object codes.	Closed	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	04/26/24	Terri Speed / Ajay Katta
People	Onboarding new resources continues to be a challenge, despite having the funding to support the role(s)	Open	6 (High/Medium)	Risk ACCEPTANCE.	Owner will continue to follow up with Department background process team. 4/26/24 AK: PALM Program Manager and RAMS Functional Consultant have been on boarded. Project Manager background check completed and awaiting joining on 5/6/24. RAMS Technical Consultant selection completed and background check paperwork in progress.	04/26/24	Andrew Gutsch
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.	Closed	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring 4/26/24 AK: PALM DEV and TEST instances have been created. This risk has been mitigated.	04/26/24	Andrew Gutsch
People	If funding is not approved, we will be unable to hire/retain additional technical and project management staff.	Closed	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. 4/26/24 AK: Funding has been approved for all of project management staff	04/26/24	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	RAMS PALM PM and ERP Technical Consultant not onboarded	Open	3 (High/Low)	PM background check completed and tentative start date is 5/6. Interviews for ERP Technical resource completed and waiting on background check	PALM work being managed by using existing resources	04/24/24	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
Processes	Several Tasks were rejected	Open	Low – All impacts not listed as Critical or High	Working to remediate the tasks.	Meeting with RC to clarify direction	05/10/24	Angela Willis-Clay

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 funtionality 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
Data	PALM Configuartion Discussion	04/26/24	Office of Financial Management	Discuss org, OA1 and OA2 configurations and possible revisions	Five members attended for two hours.
People Data	RW Task 524 - End User Survey Meeting	04/24/24	Office of Financial Management	Discuss End User Survey	Three members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	03/11/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	03/19/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	04/02/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	04/29/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Seven members attended for thirty minutes.
People Processes Data	Segment III Design Workshop: Disbursement Management	03/27/24	Office of Financial Management Office of Information Technology Services	To review the updates and discuss the changes to better prepare FDLE.	Nine members attended for eight hours.
People Processes Data	Segment III Design Workshop: Asset Accounting and Management	03/28/24	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Four members attended for eight hours.
People Processes Data	Segment III Design Workshop: Account Management and Financial Reporting; Budget Management and Cash Control	04/04/24	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Ten members attended for eight hours.
People Processes Data	RW Task 515 - Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	04/05/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Eleven members attended for thirty minutes.
People Processes Technology Data	PALM Data Day	03/26/24	Office of Financial Management Office of Information Technology Services	Provide overviews of data resources, discuss actionable steps towards agency data readiness, and set expectations for the future of data related activities.	Nine members attended for eight hours. Three members attended virtually.
People Processes Technology Data	Segment III Design Workshop: Revenue Accounting and Accounts Receivable	04/03/24	Office of Financial Management Office of Information Technology Services	To review the updates and discuss the changes to better prepare FDLE.	Five members attended for eight hours.
People Processes Technology Data	Production Support Round Table	04/23/24	Office of Financial Management Office of Information Technology Services	This Round Table will provide an opportunity for Security Access Managers (SAMs) and Identity Providers (IDPs) subject matter experts to meet the Florida PALM Production Support Team, gain insight into their current support roles and ask questions.	Seven members attended for one hour.
People Technology Data	March FDLE/PALM Readiness Touchpoint Meeting	03/20/24	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 and Alise Fields	Eight members attended for one hour.
People Technology Data	April FDLE/PALM Readiness Touchpoint Meeting	04/25/24	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, Alise Fields.	Ten members attended for one hour.
People Technology Data	Thursday Task Talk -	03/07/24	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 Technology Data	Thursday Taks Talk - Configuration Workshop Updates	03/14/24	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 Technology Data	Thursday Taks Talk - Configuration Workshop Updates	03/21/24	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 Technology Data	Thursday Task Talk - Task 523: Share Florida PALM Updates	04/11/24	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 Technology Data	Thursday Task Talk - Task 524, 527, 528, and 530	04/18/24	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 Technology Data	Thursday Task Talk - Knowledge Center Resources, Mindful Task Management and Reaching Key Milestones	04/25/24	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	Weekly Internal PALM Meeting	03/05/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	03/12/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	03/19/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/02/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/09/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/16/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/23/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/29/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Advisory Council	03/25/24	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	Advisory Council	04/09/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for one hours.
People	Florida PALM Accounts Receivable and Revenue Accounting	04/03/24	Office of Financial Management Office of Information Technology Services	Reviewed information related to below: 50.1 Set Up and Maintain Customer 60.1 Enter and Maintain Receivables 60.2.2 AR Deposits	Seven members from both ITS and OFM teams attended these meetings.
People Processes	ITS PALM Documentation	04/29/24	Office of Financial Management Office of Information Technology Services	Discuss project documentation and needed IT updates.	Four members attended for one hour.
People Processes	FDLE Smartsheet Worksheet Clean Up	03/22/24	Office of Financial Management	Discussion with both RC's regarding Smartsheet	One member attended for an hour.
People Technology	Upgrade of Oracle EBS Application and Hardware	04/24/24	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.

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:
March - April 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	05/08/24
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