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

May - June 2024

Agency Sponsor

Alan Edwards

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 = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness:

Score = 99.23%

- Submitted Complete = 12
- Submitted Incomplete = 0
- Completed After Submission = 1

RW Task Timeliness:

Score = 99.44%

- Submitted On Time = 35
- Submitted Late = 0
- Pending Submission = 1

Meeting Participation:

- Meetings Attended = 2
- Meetings Missed = 0

The dials above below 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	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		Our agency is actively working on ABS remediation based on Segment I designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that cannot be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. We will continue to monitor our progress and provide status updates to the Florida PALM project through our Readiness Coordinator and as part of our Agency Status Reporting.		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/07/24		Submission Complete	05/16/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/14/24		Submission Complete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress				
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	50% - In Progress				
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	50% - In Progress				
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress				
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/07/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/28/24			
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/14/24	SAM updates submitted to DFS A&A. Notification email sent to RC.	Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	06/25/24		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	50% - In Progress				

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.
Implementation:	**Current-State:**	**Current-State:**	**Current-State:**

Planned Florida PALM End Users = 73

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 25

• **SMEs by Business Process Grouping**

- Account Mgmt. and Financial Reporting = 4

- Accounts Receivable = 4

- Asset Accounting and Mgmt. = 5

- Banking = 4

- Budget Mgmt. and Cash Control = 5

- Contracts Mgmt. = 3

- Disbursements Mgmt. = 7

- Grants Mgmt. = 4

- Inter/IntraUnit Transactions = 10

- Payroll Mgmt. = 5

- Projects Mgmt. = 7

- Revenue Accounting = 4

- System Access and Controls = 4

Role Mapping = TBD

Training = TBD

Cataloged Business Processes = 190

• Related Business Systems = 6

• Related Reports = 10

• **Documentation Status:**

- Complete = 190 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 190

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 6

• **Level of Impact: People Changes**

- High = 0 Medium = 15 Low = 40 None = 0 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 0 Medium = 23 Low = 32 None = 0 Uncertain = 0

• **Level of Impact: Technology Changes**

- High = 0 Medium = 20 Low = 35 None = 0 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 0 Medium = 18 Low = 37 None = 0 Uncertain = 0

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

- Not Started = 0 In Progress = 0 Complete = 43

Cataloged Business Systems = 49

• **Criticality:**

- High = 27 Med = 13 Low = 6 None = 3

• **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 = 22

- Inbound Interfaces = 1

- Outbound Interfaces = 15

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 70**

- Continued Use - Yes = 50

- Continued Use - No = 19

• **Associated Business Systems = 6**

Cataloged Reports = 221

• **Criticality:**

- High = 85 Med = 56 Low = 17 None = 51

Implementation:

Segments I & II Planned Configurations = 6/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 50

• **Asset Management (AM)**

- Planned Location Codes = 488

- Planned Associated Area ID's = None

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 1949

- Planned Local Funds = None

- Planned Organization ID's = 1095

- Planned OA1's = 768

- Planned OA2's = None

Conversions & Data Readiness

• Conversions Needed = 7

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

• **Data Readiness/Cleansing Status:**

- Complete = 4 In Progress = 3 Not Started = 0 Not Applicable 0

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.	Information is shared with Agency Readiness Coordinator as they are encountered. 6-25-2024 - Error Log for the sample data files for Interfaces PCI001 and iUI003 was reviewed to send to the Florida PALM Team.	06/28/24	Rosemarie Zubler
Technology	Division of FL PALM information by Segments may result in timing differences between what is needed for remediation and task due date.	Open	9 (High/High)	Our agency is actively working on ABS remediation based on Segment designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that cannot be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. Regular monitoring of the interface catalog is occurring to stay up to date on any changes made to interface layouts or sample data files.	6-21-2024 - Discussion with agency Readiness Coordinator at monthly Touchpoint Meeting.	07/02/24	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.	7/01/2024 - 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	07/01/2024 - 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	07/01/2024 - Will monitor as FL PALM releases additional information.
Processes	Work efforts of staff augmentation resources are undertaken	Logged	11/13/23	Staff Augmentation; FDACS PALM	07/01/2024 - Will continue to monitor.

	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.			Readiness Team, CCN	

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	05/01/24	Enterprise wide	To ensure clean records for current use and for conversion to PALM.	Ongoing. Date entered reflects start of reporting period.
Data	Configuration Workbook Review	05/03/24	F&A Chiefs, PALM Director	Meeting to discuss Seg I and II Configuration Workbooks.	No other comments or updates.
Data	Configuration Workbook Review	05/03/24	Finance and Accounting	The purpose of this meeting was to discuss agency configuration needs and agency resource planning to complete task in consideration of year end obligations.	No other comments or updates.
People Data	PALM ORG Code Discussion	05/08/24	Finance and Accounting	The purpose of this meeting was to take a deep dive into the discussion of the ORG code impacts to FNW.	No other comments or updates.
People Data	FDACS Agency PALM Dashboard Discussion	06/05/24	OATS, PRT	Discussion on key elements needed for the agency internal PALM Dashboard.	No other comments or updates.
People Data	FDACS Agency PALM Dashboard Discussion	06/11/24	OATS, PRT	Discussion on key elements needed for the agency internal PALM Dashboard.	No other comments or updates.
People Processes Technology Data	PALM End User Survey	05/20/24	Finance and Accounting, Administration	Exploring survey options with Organization and Strategic Development.	No other comments or updates.
People Processes Technology Data	Certified Forward Training/PALM Update	05/21/24	Finance and Accounting, Administration	The purpose of this meeting was to provide a Florida PALM update and FYE Certified Forward Training.	No other comments or updates.
People Processes Technology Data	Monthly Supervisors Meeting	05/30/24	Finance and Accounting	Monthly F&A Supervisors meeting; Florida PALM Director provides high level summary of open readiness activities for agency.	No other comments or updates.
People Processes Technology Data	Post Florida PALM AC Meeting Review	06/19/24	Finance and Accounting, Technical Liaison	Review session following Florida PALM AC meeting to discuss information shared by Florida PALM Project and A&A, specifically as it impacts AIMS.	No other comments or updates.
People Technology Data	PALM ORG Code	05/08/24	Finance and Accounting, Food Nutrition and Wellness	Meeting to FNW Division to discuss ORG Codes in support of readiness task and future implementation.	No other comments or updates.
People Technology Data	Review Phase 1 UAT	06/10/24	Finance and Accounting	Meeting to discuss/confirm Phase 1 draft of ABS (REV) internal UAT plan.	No other comments or updates.
People Technology Data	DIO Monthly Meeting	06/19/24	Finance and Accounting, OATS, DIOs	Chief of Finance and Accounting/Business Liaison presented update on Florida PALM to Division Information Officers.	No other comments or updates.
Processes Technology Data	Monthly Touchpoint Prep with Technical Liaison	05/15/24	Finance and Accounting, Technical Liaison	Consolidation of any open technical questions from Technical Liaison to prepare for May Touchpoint with PALM Technical Readiness Team.	No other comments or updates.
Processes Technology Data	COA Crosswalk Prototype Demo	05/24/24	OATS, Admin, Finance and Accounting, PPMO	The purpose of this meeting is to demonstrate the COA Crosswalk Prototype that OATS has been developing to help assist FDACS users with the transition to PALM.	No other comments or updates.
Technology Data	Discussion on PRT UAT Test Plan	05/08/24	Administration, OATS, Finance and Accounting, General Services, Admin IT	The purpose of this meeting was to collectively discuss the PRT UAT plan with impacted agency resources to identify expectations and timeline conflicts.	No other comments or updates.
Technology Data	FP Interface sample data errors	05/16/24	Finance and Accounting, PRT, Technical Liaison	Consolidated list of errors encountered by PRT when trying to load interface sample files.	No other comments or updates.
Technology Data	FDACS PALM Monitoring Meeting	06/06/24	OATS, Admin, Finance and Accounting, PPMO, Payroll	The purpose of this weekly meeting is for the team of internal FDACS resources to regroup and discuss project communications, project status, decision points, and review risks and issues with Agency Sponsor.	No other comments or updates.
Technology Data	AIMS Remediation JAD Session-Contracts	06/07/24	Finance & Accounting, PRT, Administration, OATS, Purchasing, Administration IT	Discussion regarding PALM remediation changes to the Contracts Requisition and Approval screens.	No other comments or updates.
Technology Data	Revenue Object Codes Review	06/24/24	Finance and Accounting, Technical Liaison	Meeting to review published proposed revenue standardization list and to determine impact to agency activity codes.	No other comments or updates.
People	PALM Task 524 Phase 2 Meeting	05/20/24	Finance & Accounting, OATS	The purpose of this meeting is to review/confirm the draft survey questions and to confirm the end user list.	No other comments or updates.
People	PALM Task 537-Smartsheet Access Review	05/22/24	Finance & Accounting, OATS	The purpose of this meeting is to review the users and access rights for Smartsheet ahead of task 537 release in consideration of year end obligations of agency resources.	No other comments or updates.
People	PALM Tasks 526,527, and 529 Review	05/23/24	Finance & Accounting, OATS	The purpose of this meeting is to review the task instructions and agency resource needs due to year end obligations of agency resources as it pertains to documented risk for agency.	No other comments or updates.
People	PALM Readiness Status Meeting	05/29/24	OATS, Finance and Accounting, Admin IT	The purpose of this meeting is to discuss FDACS UAT readiness.	No other comments or updates.
People Processes	PALM Task 534 Discussion	06/06/24	Finance & Accounting, PRT, Administration	The intent of this meeting is to review the FDACS current CCN and confirm all roles are current for PALM Task 534.	No other comments or updates.
Processes	Process Review	05/01/24	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.
Technology	Daily PRT Standups	05/01/24	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.	Work breakdown structure and deliverable progress monitoring; Project Management Liaison, Change Management Liaison. Date entered reflects start of reporting period.
Technology	Sprint Retrospectives and planning	05/01/24	PRT, OATS, Finance & Accounting	Conduct retrospective of ending sprint and plan for next sprint.	Occurs biweekly. Date entered reflects start of reporting period.
Technology	PALM PRT Mid Sprint Planning	05/01/24	PRT, OATS, Finance & Accounting	A review of the current sprint's work and preview the next sprint's work items and activities.	Occurs biweekly. Date entered reflects start of reporting period.
Technology	PALM Biweekly Technical Meeting	05/01/24	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 start of reporting period.
Technology	Weekly Summary Reporting	05/01/24	PRT, OATS, Finance & Accounting, Admin IT	Provide status of completed and ongoing PRT deliverables/agency tasks; analyze implementation schedule progress; plan for next week.	Every Friday. Date entered reflects start of reporting period.
Technology	FANS to AIMS Status Meeting	05/01/24	OATS, Admin, Finance and	The purpose of this weekly meeting is (1) FANS PALM	Occurs weekly on Thursdays. Date entered reflects

			Accounting, FDACS PALM Remediation Team	Remediation status update (What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps (Goals for the next week).	start of reporting period.
Technology	Weekly Touchpoint with CCN Technical Liaison	05/01/24	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 start of reporting period.
Technology	Item Vendor View and Vendor Edit Screens Prototype Demo	05/03/24	Purchasing, OATS, Finance & Accounting, PPMO, Admin IT, Administration	The purpose of this meeting is to confirm the Item Details and Fund Codes Screen requirements and review Prototype for Vendor View/Vendor Edit screens.	No other comments or updates.
Technology	PALM UAT Preparation Meeting	05/07/24	OATS, PRT	The purpose of this meeting is to review the availability of resources for the scheduled UAT given agency year end close and PTO.	No other comments or updates.
Technology	PO and Contract Number Meeting	05/23/24	Purchasing, Finance & Accounting, Administration, Admin IT, PRT, OATS	The purpose of this meeting is to discuss the generation of PO and Contract numbers during the approval process, and the remediation of the Request Processing screen.	No other comments or updates.
Technology	Risks and Issue Management, monitoring Implementation Schedule, reviewing vacancies	05/30/24	PALM Management Workgroup	Consistently review and update Risks, Issues, Assumptions, Implementation Schedule, and vacancies.	Primary: Project Management Liaison, Change Management Liaison
Technology	Item Details and Fund Codes Demo	06/20/24	PRT, Finance and Accounting, OATS, Admin IT, Purchasing	The purpose of this meeting is to demo remediated PALM features and changes .	No other 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

DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Alan Edwards	alan.edwards@fdacs.gov	07/09/24
March - April 2024	Alan Edwards	alan.edwards@fdacs.gov	05/08/24
January - February 2024	Alan Edwards	alan.edwards@fdacs.gov	03/11/24