DLA 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

Sabrina Donovan

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 = 13
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness:

Score = 74.67%

- Submitted Complete = 7
- Submitted Incomplete = 1
- Completed After Submission = 7

RW Task Timeliness:

Score = 92.78%

- Submitted On Time = 29
- Submitted Late = 6
- Pending Submission = 1

Meeting Participation:

- Meetings Attended = 2
- 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	Modified the changes and resubmitted on 05/21/2024	Submission Complete	05/21/24
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				
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	05/15/24	Attached the survey to Agency Readiness Survey Form	Submission Complete	06/03/24
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	07/03/24	data conversion for Suppliers updated 07/11/2024	Submission Incomplete	07/11/24
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/13/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/19/24			
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/05/24		Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24					
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24					
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24					

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 = 27

- Business Process Groupings = 12/13

Identified Subject Matter Experts = 10

- **SMEs by Business Process Grouping**
- Account Mgmt. and Financial Reporting = 2
- Accounts Receivable = 1
- Asset Accounting and Mgmt. = 2
- Banking = 1
- Budget Mgmt. and Cash Control = 1

Processes

Current-State:

Cataloged Business Processes = 67

- Related Business Systems = 5
- Related Reports = 9
- **Documentation Status:**
- Complete = 67 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 67

- Related Business Process Groupings = 11

Technology

Current-State:

Cataloged Business Systems = 13

- **Criticality:**
- High = 9 Med = 0 Low = 1 None = 3
- **Documentation Status:**
- Complete = 10 Partial = 3 Not Started = 0

Cataloged Interfaces = 19

- Inbound Interfaces = 0
- Outbound Interfaces = 19

Data

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- Continued Use - Yes = 39
- Continued Use - No = 3
- **Associated Business Systems = 15**

Cataloged Reports = 176

- **Criticality:**
- High = 21 Med = 1 Low = 86 None = 0

- Contracts Mgmt. = 2
- Disbursements Mgmt. = 1
- Grants Mgmt. = 2
- Inter/IntraUnit Transactions = 3
- Payroll Mgmt. = 2
- Projects Mgmt. = 2
- Revenue Accounting = 1
- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

- Planned Spreadsheet Uploads = 7

• **Level of Impact: People Changes**

- High = 0 Medium = 1 Low = 32 None = 2 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 0 Medium = 10 Low = 22 None = 1 Uncertain = 2

• **Level of Impact: Technology Changes**

- High = 1 Medium = 5 Low = 26 None = 1 Uncertain = 2

• **Level of Impact: Data Changes**

- High = 0 Medium = 30 Low = 2 None = 0 Uncertain = 4

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

- Not Started = 1 In Progress = 1 Complete = 34

Implementation:

Business Systems Planned for Integration = 6

• **Segment I - Documentation Updates:**

- Complete = 5 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• **Segment II - Documentation Updates:**

- Complete = 5 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 10

- Inbound Interfaces = -5

- Outbound Interfaces = 8

Implementation:

Segments I & II Planned Configurations = 8/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 1

• **Asset Management (AM)**

- Planned Location Codes = 13

- Planned Associated Area ID's = 112

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 397

- Planned Local Funds = None

- Planned Organization ID's = 174

- Planned OA1's = 22

- Planned OA2's = 22

Conversions & Data Readiness

• Conversions Needed = 5

• Agency Data Outside of Primary Source System(s) = 1

• **Data Readiness/Cleansing Status:**

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 1

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.

DLA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Technology	Loss of technical CNN participant	Open	9 (High/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	Position is still vacant. 04/23/2024 position is still vacant	02/26/26	Sabrina Donovan
Processes Technology	Changes to project scope potentially impacts agency planned mitigation.	Open	9 (High/High)	Review BPM's for changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	Review continues 04/23/2024 this is is a continuing risk.	03/11/24	Sabrina Donovan
Technology Data	The Finance & Accounting Microsoft Access applications that are used daily by staff must be modified in time for PALM interface testing.	Closed	9 (High/High)	Agency will submit a funding request with a workplan and budget issue for two developers to program a replacement application that is compatible with PALM data.	New Risk. This has been elevated to an Issue, number 7.	06/17/24	Sabrina Donovan
Technology	A Schedule of Allotment Balances (SAB) that is meaningful to an agency will not be generated from PALM if agencies cannot enter budget allotments at the account level.	Open	9 (High/High)	The agency will have to develop an ABS to produce a SAB that can be used to manage their budget.	Updated on 06/05/2024; No change:06/17/2024-Florida PALM project is testing a solution but we've not be advised of the results.	05/15/24	Sabrina Donovan

DLA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Reengineer FLAIR accounting interfaces to Florida PALM.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation to review data formats and interface options to determine optimal solution.	Continuing issue. 04/23/2024 - this is a continuing issue.	01/31/25	Sabrina Donovan
People Processes Technology	Software Integration Issues: Planned software integration may not work as expected, leading to re-design and re-work.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation in design workshops and UAT.	Continuing issue. 04/23/2024 - this is a continuing issue.	01/31/25	Sabrina Donovan
Processes	Need ability to make corrections to closed reporting period	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option	new issue moved from risk-I don't think this has a resolution. 04/23/2024 - still need to understand the transaction correction process in Florida PALM.	01/31/25	Darlene Faris
Data	Need the ability to request Activities to the Activity ChartField for use with the Project-related ChartFields or provide a list to DFS for updating the Activity ChartField.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Prepare a draft list to send to DFS for updating PALM.	New Issue	05/10/24	Sabrina Donovan
Processes Technology	In order to relate deposits for accounts receivable transactions into our ABS we MUST be able to use a Filler field of 10 to 12 alpha/numeric characters to utilize AR number	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option from PALM.	New Issue	05/14/24	Darlene Faris
Processes Technology Data	Existing ABS requires extensive development to accommodate PALM. OAG is unable to submit a budget amendment for PALM funds for staff augmentation of technical personnel.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need PALM funding to support technical resources for staff augmentation.	New Issue	06/12/24	Sabrina Donovan
People	Availability of Finance & Accounting SMEs: Due to workload and competing priorities SMES may not be available. This may result in extending the overall schedule, and adding cost to the budget	Open	High - Impacts the ability of the agency to meet deadlines or milestones	When the staff aug business analyst is engaged, interviews will need to be scheduled to minimize work disruption.	Scheduling of Segment IV workshops coincides with year-end activities, resulting in reduced availability. 04/23/2024 - this is a continuing	01/31/25	Sabrina Donovan

					this is a continuing issue.		

DLA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting	no change
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	no change

DLA 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** *

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DLA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	07/12/24
March - April 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	05/13/24
January - February 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/11/24