

### Helpful Links

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- Readiness Workplan

# DMA 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

Col. Adam Curry

### CCN Composition



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

#### Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 2
- 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 = 91.43%**
- Submitted Complete = 11
  - Submitted Incomplete = 0
  - Completed After Submission = 3

### 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 = 98.37%**
- Submitted On Time = 31
  - Submitted Late = 5
  - 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 = 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	05/09/24		Submission Complete	05/15/24
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	06/20/24		Submission Complete	06/20/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/05/24		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	07/12/24			
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	07/12/24		Submission Incomplete	
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	07/12/24			
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	07/12/24			
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/02/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/25/24			06/25/24
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/05/24		Submission Complete	06/05/24
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	50% - In Progress				
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	07/08/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/10/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	75% - Consolidating/Inputting Information for Submission				
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/15/24			

### People

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

#### Implementation:

**Planned Florida PALM End Users = 22**

- Business Process Groupings = 10/13

**Identified Subject Matter Experts = 11**

#### • SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 2
- Accounts Receivable = 1

### Processes

The sequence of procedures to accomplish a business objective.

#### Current-State:

**Cataloged Business Processes = 24**

- Related Business Systems = 4

- Related Reports = 14

#### • Documentation Status:

- Complete = 24 Partial = 0 Not Started = 0

### Technology

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

#### Current-State:

**Cataloged Business Systems = 5**

#### • Criticality:

- High = 2 Med = 3 Low = 0 None = 0

#### • Documentation Status:

- Complete = 2 Partial = 0 Not Started = 2

**Cataloged Interfaces = 1**

### Data

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

#### Current-State:

**Unique FLAIR Data Elements = 94**

- Associated Unique Uses = 97

- Continued Use - Yes = 71

- Continued Use - No = 22

- Associated Business Systems = 2

**Cataloged Reports = 48**

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

**Role Mapping = TBD**

**Training = TBD**

**Implementation:**

**Impacted Agency Business Processes = 24**

- Related Business Process Groupings = 13
- Planned Spreadsheet Uploads = 0
- **Level of Impact: People Changes**
- High = 0 Medium = 0 Low = 0 None = 24 Uncertain = 0
- **Level of Impact: Processes Changes**
- High = 0 Medium = 0 Low = 24 None = 0 Uncertain = 0
- **Level of Impact: Technology Changes**
- High = 0 Medium = 0 Low = 11 None = 13 Uncertain = 0
- **Level of Impact: Data Changes**
- High = 0 Medium = 0 Low = 0 None = 24 Uncertain = 0
- **Segments I & II Documentation Update Status**
- Not Started = 0 In Progress = 0 Complete = 24

- Inbound Interfaces = 0
- Outbound Interfaces = 1

**Implementation:**

**Business Systems Planned for Integration = 2**

- **Segment I - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2
- **Segment II - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 1
- Planned Interfaces = 6**
- Inbound Interfaces = 3
- Outbound Interfaces = 3

**Criticality:**

- High = 28 Med = 12 Low = 6 None = 1

**Implementation:**

**Segments I & II Planned Configurations = 6/9**

- **Accounts Receivable (AR)**
- Planned Distribution Codes = 1
- **Asset Management (AM)**
- Planned Location Codes = 229
- Planned Associated Area ID's = None
- **Commitment Control (KK)**
- Planned Option = Option # 2 - Control
- **General Ledger (GL)**
- Planned Budgetary Value Combo Edits = 333
- Planned Local Funds = None
- Planned Organization ID's = 213
- Planned OA1's = 18
- Planned OA2's = None
- Conversions & Data Readiness**
- **Conversions Needed = 4**
- **Agency Data Outside of Primary Source System(s) = 2**
- **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 tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DMA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Awaiting information about new tracking system to replace Quickbooks	Open	6 (High/Medium)	LBR request was denied. Working with PALM to develop either an interface or spreadsheet upload.	Jun/Jul 24	01/09/24	Jack McAlpine

**DMA Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Data	Non participation.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Continued communication with department supervisors. Ensure leadership involvement.	Jun/Jul 24 - improvement from involvement with Staff. Continue to monitor.	07/30/24	Jack McAlpine
People Processes	Budget Administrator and Finance Supervisor are in the process of training several new personnel.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To bring staff up to date with current processes within the Finance and Accounting Office.	Jun/Jul 24 Continue to train staff	06/30/24	Trixy Pacetti
People Processes Technology Data	Continued training of new staff members in additional to required training for budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Will resolve with time.	Jun/Jul 24 Continue to train staff	06/30/24	Trixy Pacetti
People Processes Technology Data	Start planning process for 2-3 week downtime of system when FLAIR converts to PALM	Open	High - Impacts the ability of the agency to meet deadlines or milestones	DMA Staff must plan and implement downtime process necessary for the potential FLAIR offline due to conversion to PALM.	Jun/Jul 24	07/31/25	Kevin Creech
Technology	Quickbooks Replacement	Open	Low - All impacts not listed as Critical or High	It appears the request for a Quickbooks database will end up being denied based on previous offers from House and Senate. The agency will plan on moving forward with Quickbooks.	Jun/Jul 24 - Continue to work with PALM support on whether to have Quickbooks interface with PALM or provide a spreadsheet upload.	08/30/24	Jack McAlpine
Processes Data	Lump sum payment made for multiple items that become Assets: a. FLAIR allows these payments to be unitized into Assets by the Asset tag and cost per item. b. Palm allows these payments to be unitized into Assets by dividing the total costs by the total assets averaging the costs per unit rather than by the true costs.	Open	Low - All impacts not listed as Critical or High	Cost averaging is ok if every asset has the exact same cost but there are many assets purchased together where the costs are completely different. This will result in inaccurate asset valuations. Example would be a skid steer with multiple attachments.	Jun/Jul 24	07/05/24	Brad Bowman
Processes Data	FLAIR Pending table vs PALM staging table	Open	Low - All impacts not listed as Critical or High	a. FLAIR allows for pending items to be deleted. If payments are made for assets that fall outside the threshold of property by State and Agency requirements. These can be deleted. b. Palm allows for the pending item to be skipped but its can never be deleted.	Jun/Jul 24	07/05/24	Brad Bowman

**DMA Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	Changing of ARRO file format	Logged	03/05/24	Agency has concern about potential file changes that will be required from ARRO without missing any bi-weekly payrolls.	Jan/Feb

People Processes Technology Data	A downtime plan for FLAIR will be in place prior to the conversion to PALM.	Logged	07/31/25	All agency business systems	Mar/Apr 24
People Processes Technology Data	Possible solution for CA/Quickbooks within PALM system.	Logged	06/25/24	Grant Tracking Process at Financial Wave. See attached.	Jun/Jul 24

### DMA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	DMA touchpoint review with Dora	05/15/24	Collaborative	Provided overall feedback on project from PALM Team.	May 24
People Processes Technology Data	Received survey results	05/31/24	Informational and Consultative	Provide feedback from State User on the PALM conversion.	Jun 24
People Processes Technology Data	Submitted Results of Survey	06/03/24	Informational	Submitted feedback	Jun 24
People Processes Technology Data	DMA touchpoint review with Dora	06/19/24	Collaborative	Provided overall feedback on project from PALM Team. Changed to 3rd Wed of each month.	Jun 24

### 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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### DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	COL Adam Curry	adam.m.curry.mil@army.mil	07/10/24
March - April 2024	Timothy Smith	timothy.j.smith53.nfg@army.mil	05/01/24
January - February 2024	COL Adam Curry	adam.m.curry.mil@army.mil	03/06/24