DOE 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

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

Change Champion Network:

• Unique Filled Role = 9

• Duplicate Filled Role = 7

• 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 = 84.55%

• Submitted Complete = 7

• Submitted Incomplete = 0

• Completed After Submission = 4

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 = 92.5%

• Submitted On Time = 30

• Submitted Late = 5

• Pending Submission = 1

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	05/10/24		Submission Complete	05/24/24
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	05/31/24		Submission Complete	
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	75% - Consolidating/Inputting Information for Submission		Procurement department is completing their cleanse of Contracts, and the task will be completed.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/11/24			
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/11/24			
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	07/11/24			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Internal Meetings and Information Gathering				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/13/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/28/24			
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/13/24		Submission Complete	06/13/24
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	50% - In Progress				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/11/24			
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/12/24			
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 88

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 13

• **SMEs by Business Process Grouping**

- Account Mgmt. and Financial Reporting = 1

- Accounts Receivable = 1

- Asset Accounting and Mgmt. = 1

- Banking = 1

- Budget Mgmt. and Cash Control = 2

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 30

• Related Business Systems = 5

• Related Reports = 0

• **Documentation Status:**

- Complete = 29 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 30

• Related Business Process Groupings = 5

Technology

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

Current-State:

Cataloged Business Systems = 26

• **Criticality:**

- High = 23 Med = 0 Low = 0 None = 1

• **Documentation Status:**

- Complete = 7 Partial = 1 Not Started = 9

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 443

• **Associated Unique Uses = 574**

- Continued Use - Yes = 124

- Continued Use - No = 3

• **Associated Business Systems = 6**

Cataloged Reports = 87

• **Criticality:**

- High = 87 Med = 13 Low = 1 None = 0

- Contracts Mgmt. = 2

- Disbursements Mgmt. = 1

- Grants Mgmt. = 1

- Inter/IntraUnit Transactions = 1

- Payroll Mgmt. = 2

- Projects Mgmt. = 1

- Revenue Accounting = 2

- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

- Planned Spreadsheet Uploads = 1

• **Level of Impact: People Changes**

- High = 23 Medium = 3 Low = 4 None = 0 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0

• **Level of Impact: Technology Changes**

- High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 22 Medium = 3 Low = 3 None = 0 Uncertain = 0

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

- Not Started = 0 In Progress = 0 Complete = 30

Implementation:

Business Systems Planned for Integration = 9

• **Segment I - Documentation Updates:**

- Complete = 0 Updating = 6 Evaluating = 0 Not Started = 0 Not Needed = 0

• **Segment II - Documentation Updates:**

- Complete = 0 Updating = 5 Evaluating = 0 Not Started = 0 Not Needed = 1

Planned Interfaces = 6

- Inbound Interfaces = 1

- Outbound Interfaces = 4

Implementation:

Segments I & II Planned Configurations = 6/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 8

• **Asset Management (AM)**

- Planned Location Codes = 1050

- Planned Associated Area ID's = None

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 882

- Planned Local Funds = None

- Planned Organization ID's = 725

- Planned OA1's = 576

- Planned OA2's = None

Conversions & Data Readiness

• Conversions Needed = 6

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

• **Data Readiness/Cleansing Status:**

- Complete = 4 In Progress = 1 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.

DOE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology Data	Significant delay in receiving the technical requirements	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
Processes Technology Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
People Technology Data	Not meet due date for Task 519 Segment 1 remediation	Closed	6 (Medium/High)	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New Risk	05/07/24	PM and technical Staff
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	6 (High/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified.	05/30/24	Project Manager
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team {anyone working on PALM}). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	New Risk	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	New risk	01/12/24	DIT and Aware technical teams
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	New risk	01/30/24	AWARE Team

DOE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
Data	Task 514 incomplete	Closed	Low - All impacts not	Team is currently working to complete the cleanse		05/30/24	Business unit

			listed as Critical or High				
People Technology Data	Not meet due date for Task 519 Segment 1 remediation	Open	Low - All impacts not listed as Critical or High	All remediation will be done once information is received.		10/01/24	PM

DOE Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023

DOE 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	PALM Status Meeeting	05/02/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
Processes Technology Data	DTI Weekly Status report	05/02/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Processes	PALM Project Plan Meeting	05/06/24	DTI and PM	Update PALM project plan by adding application to the schedule.	
Data	Data Cleanse and Conversion meeting	05/07/24	Comptrollers' leadership and PM	Complete task 513 and move to 526	
Technology	Review of the TraQ application	05/08/24	Asset Management, Technical lead and PM	to determine should this system be added to the remediation list	
Processes Technology	Technical Meeting	05/09/24	technical team and PM	Establishment of table development coordination session	
Processes	Review of reports inventory	05/09/24	CFO, Budget staff, Deputy Comptroller and PM	Review reports inventory to make sure Budget reports are the inventory	
Technology	DTI Weekly Status report	05/09/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People	PALM Status Meeeting	05/09/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
Technology	Establishment of Table Development Coordination Session	05/09/24	DTI team and PM	Establishment of Table Development Coordination Session	
People Data	Reports inventory	05/09/24	Deputy Comptroller, Budget Department, and PM	Make sure Budget reports and accounted for.	
People	Status Report	05/10/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Processes	PALM System and Processes	05/15/24	Deputy Comptroller, Policy Coordinator, and PM	Go over department systems	
People Data	FLAIR to PALM Reports	05/16/24	Access Manager, Deputy Comptroller, Accountant IT specialist, and PM	To make sure report are cover.	
People Technology	DTI Weekly Status report	05/16/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People	Status Report	05/17/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology Data	API002 and API031 updates	05/23/24	Comptroller's Staff, IT Team and PM	Provide updates on files changes for DOE	
People Technology	DTI Weekly Status report	05/23/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People	Status Report	05/24/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Data	Data Cleanse	05/24/24	Agency SME's and PM	Data cleanse task	
People Technology	DTI Weekly Status report	05/30/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People	Status Report	05/31/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Processes Data	Contracts Conversions	06/04/24	Procurement team, Grant Managers, Deputy comptroller and PM	Conversions for contracts	
People Technology	DTI Weekly Status report	06/06/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	Data Table API020 Finalization	06/13/24	Data Table API020 Finalization	Data Table API020 Finalization	
People	Status Report	06/14/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology Data	Data Table API020 Finalization	06/19/24	DTI team and PM	Complete Data table for API020	
People Technology	DTI Weekly Status report	06/20/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	

People	Status Report	06/21/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Processes	UAT and training discussion	06/24/24	SME's and PM	Development of UAT outline and training plan	
People	DOE PALM DTI Expectations	06/24/24	DTI leadership, Deputy Comptroller, and PM	meeting to help define DTI expectations with regards to DOE PALM project.	
People Technology	DTI Weekly Status report	06/28/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	

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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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Matt Kirkland	matt.kirkland@fldoe.org	07/12/24
March - April 2024	Matt Kirkland	matt.kirkland@fldoe.org	05/13/24
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24