

### Helpful Links

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- Florida PALM Workbook for FWC
- Readiness Workplan

# FWC 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

Jessica Crawford

### CCN Composition



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

#### Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 13
- 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 = 99.29%**
- Submitted Complete = 13
  - Submitted Incomplete = 0
  - Completed After Submission = 1

### 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 = 94.44%**
- Submitted On Time = 34
  - Submitted Late = 1
  - 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
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		We expect to have our data cleansing Grants cleanup done by August		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	06/28/24	We have remediated our ABS as much as possible based on Segment 1 design.		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/10/24	FWC removed one line from the Local Fee worksheet and made the corrections as pointed out on the Organization worksheet.	Submission Complete	05/22/24
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	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	05/07/24	We do not have any agency business systems associated with Segment 3, they are all in 1, 2, and 4.	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	05/07/24	We do not have any agency business systems associated with Segment 3, they are all in 1, 2, and 4. As a result, we have no interfaces for Segment 3.	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				
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	05/08/24		Submission Complete	
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				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/08/24		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	06/04/24		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	No changes needed	Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/03/24			
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:

### Processes

The sequence of procedures to accomplish a business objective.

#### Current-State:

### Technology

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

#### Current-State:

### Data

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

#### Current-State:

**Planned Florida PALM End Users = 100**

• Business Process Groupings = 5/13

**Identified Subject Matter Experts = 14****• SMEs by Business Process Grouping**

- Account Mgmt. and Financial Reporting = 4

- Accounts Receivable = 1

- Asset Accounting and Mgmt. = 2

- Banking = 3

- Budget Mgmt. and Cash Control = 3

- Contracts Mgmt. = 3

- Disbursements Mgmt. = 3

- Grants Mgmt. = 1

- Inter/IntraUnit Transactions = 4

- Payroll Mgmt. = 4

- Projects Mgmt. = 1

- Revenue Accounting = 1

- System Access and Controls = 2

**Role Mapping = TBD****Training = TBD****Cataloged Business Processes = 114**

• Related Business Systems = 3

• Related Reports = 3

**• Documentation Status:**

- Complete = 40 Partial = 0 Not Started = 0

**Implementation:****Impacted Agency Business Processes = 114**

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 1

**• Level of Impact: People Changes**- High = 5 Medium = 0 Low = 26 None = 8  
Uncertain = 0**• Level of Impact: Processes Changes**- High = 8 Medium = 12 Low = 10 None = 8  
Uncertain = 0**• Level of Impact: Technology Changes**- High = 0 Medium = 8 Low = 23 None = 8  
Uncertain = 0**• Level of Impact: Data Changes**- High = 2 Medium = 22 Low = 7 None = 8  
Uncertain = 0**• Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete = 38

**Cataloged Business Systems = 11****• Criticality:**

- High = 6 Med = 4 Low = 0 None = 1

**• Documentation Status:**

- Complete = 11 Partial = 0 Not Started = 0

**Cataloged Interfaces = 8**

- Inbound Interfaces = 8

- Outbound Interfaces = 0

**Implementation:****Business Systems Planned for Integration = 7****• Segment I - Documentation Updates:**- Complete = 1 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0**• Segment II - Documentation Updates:**- Complete = 6 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0**Planned Interfaces = 2**

- Inbound Interfaces = -1

- Outbound Interfaces = 2

**Unique FLAIR Data Elements = 113****• Associated Unique Uses = 750**

- Continued Use - Yes = 700

- Continued Use - No = 0

**• Associated Business Systems = 34****Cataloged Reports = 41****• Criticality:**

- High = 32 Med = 8 Low = 1 None = 2

**Implementation:****Segments I & II Planned Configurations = 6/9****• Accounts Receivable (AR)**

- Planned Distribution Codes = 9

**• Asset Management (AM)**

- Planned Location Codes = 650

- Planned Associated Area ID's = None

**• Commitment Control (KK)**

- Planned Option = Option # 2 - Control

**• General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 849

- Planned Local Funds = None

- Planned Organization ID's = 241

- Planned OA1's = 1

- Planned OA2's = None

**Conversions & Data Readiness**

• Conversions Needed = 6

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

**• Data Readiness/Cleansing Status:**

- Complete = 5 In Progress = 1 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.

**FWC Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Limited subject matter expert (SME) availability	Open	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	No change	11/06/23	Laurie Kershaw
People	Team Attrition	Open	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	No change	11/06/23	Laurie Kershaw
People	Resistance to change	Open	4 (Medium/Medium)	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact	No change	11/06/23	Laurie Kershaw
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FWC is unable to accurately define impacts to our systems without complete specifications on the interfaces.	Open	4 (Medium/Medium)	1. FWC Analysis and design is being based on calculated assumptions	We reduce the risk rating on this item since most of the interfaces have been designed.	11/06/23	Laurie Kershaw

**FWC Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**FWC 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	FWC will be able to access the available Administered funds	Logged	07/03/23	All agency business systems	No change

**FWC 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	Create and/or modify FLAIR business process documents for Segments 4	05/06/24	Florida PALM users	Create and/or modify FLAIR business process documents	Complete
People Processes Technology	Mark Task Complete in Smartsheet	05/20/24	Florida PALM users	Mark Task Complete in Smartsheet	Complete
People Processes Technology	Task Due	05/10/24	Florida PALM users	Task Due	Complete
People	<b>Complete Task 519 Remediate Agency</b>	06/28/24	Florida PALM users	Complete Task 519 Remediate Agency Business Systems	Complete

Processes Technology	Business Systems based on Segment I			based on Segment I	
People Processes Technology	OIT to perform voucher system modifications	06/28/24	Florida PALM users	OIT to perform voucher system modifications	Complete
People Processes Technology	Send additional surveys to identified users, as needed	05/01/24	Florida PALM users	Send additional surveys to identified users, as needed	Complete
People Processes Technology	Perform secondary analysis	05/08/24	Florida PALM users	Perform secondary analysis	Complete
People Processes Technology	Develop agency-specific readiness action	05/15/24	Florida PALM users	Develop agency-specific readiness action	Complete
People Processes Technology	Mark task complete in Smartsheet	05/30/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Task Due	06/14/24	Florida PALM users	Task Due	Complete
People Processes Technology	10.3.1 Perform Month End Close - Update business process documentation	05/06/24	Florida PALM users	10.3.1 Perform Month End Close - Update business process documentation	In Process
People Processes Technology	20.2.1 Manage Budget Checking - Update business process documentation	05/06/24	Florida PALM users	20.2.1 Manage Budget Checking - Update business process documentation	In Process
People Processes Technology	20.2.3 Invested Balance Checking - Update business process documentation	05/06/24	Florida PALM users	20.2.3 Invested Balance Checking - Update business process documentation	In Process
People Processes Technology	30.1 Set Up and Maintain Suppliers - Update business process documentation	05/06/24	Florida PALM users	30.1 Set Up and Maintain Suppliers - Update business process documentation	Completed
People Processes Technology	40.2 Deploy and Maintain Assets - Update business process documentation	05/06/24	Florida PALM users	40.2 Deploy and Maintain Assets - Update business process documentation	In Process
People Processes Technology	50.1 Set Up and Maintain Customer - Update business process documentation	05/06/24	Florida PALM users	50.1 Set Up and Maintain Customer - Update business process documentation	In Process
People Processes Technology	60.1 Enter and Maintain Receivables - Update business process documentation	05/06/24	Florida PALM users	60.1 Enter and Maintain Receivables - Update business process documentation	In Process
People Processes Technology	60.2.2 AR Deposits - Update business process documentation	05/06/24	Florida PALM users	60.2.2 AR Deposits - Update business process documentation	In Process
People Processes Technology	Update Smartsheet	05/07/24	Florida PALM users	Update Smartsheet	Completed
People Processes Technology	<b>Complete Task 533 Manage Agency Specific Implementation Schedule, Risks and Issues</b>	05/01/24	Florida PALM users	Complete Task 533 Manage Agency Specific Implementation Schedule, Risks and Issues	Complete
People Processes Technology	Update Documentation	06/28/24	Florida PALM users	Update Documentation	Complete
People Processes Technology	Mark Task Complete in Smartsheet	06/28/24	Florida PALM users	Mark Task Complete in Smartsheet	Complete
People Processes Technology	<b>Complete Task 535 Update Workforce Readiness Plan</b>	06/17/24	Florida PALM users	Complete Task 535 Update Workforce Readiness Plan	In Process
People Processes Technology	Update Documentation	06/18/24	Florida PALM users	Update Documentation	In Process
People Processes Technology	<b>Complete Task 536 Create Agency Specific User Acceptance Testing Plan</b>	06/17/24	Florida PALM users	Complete Task 536 Create Agency Specific User Acceptance Testing Plan	In Process
People Processes Technology	536-A Establish testing objectives, scope, key activities and their agency roles and responsibilities	06/18/24	Florida PALM users	536-A Establish testing objectives, scope, key activities and their agency roles and responsibilities	In Process

#### 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

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#### FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Jessica Crawford	jessica.crawford@myfwc.com	07/02/24
March - April 2024	Jessica Crawford	jessica.crawford@myfwc.com	05/08/24
January - February 2024	Jessica Crawford	jessica.crawford@myfwc.com	03/06/24