FDLE Status Report Dashboard

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for FDLE
- Readiness Workplan

Reporting Period

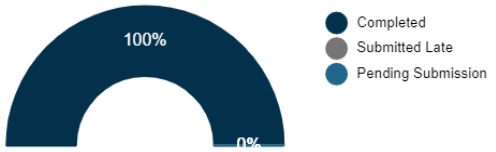
November - December 2023

Agency Sponsor

Charlotte Fraser

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Readiness Workplan Tasks



The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 14
- Submitted Late = 0
- Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/05/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/12/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/05/23	This document may be revised when our Program Manager is in place.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/07/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/19/23	Will do as best as we can. Program Manager can get more in depth when they are hired.
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

People

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

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

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

Participation:

- Meetings Attended = 4
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 279

- Related Business Systems = 15
- Related Reports = 57
- **Documentation Status:**

- Complete = 199 Partial = 44 Not Started = 38

Implementation:

- Role Mapping = TBD

Technology

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

Current-State:

Cataloged Business Systems = 21

- **Criticality:**

- High = 14 Med = 0 Low = 0 None = 7
- **Documentation Status:**

- Complete = 2 Partial = 10 Not Started = 7

Cataloged Interfaces = 46

- Inbound Interfaces = 24
- Outbound Interfaces = 22

Implementation:

Business Systems Planned for Integration = 16

- **Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 3 Not Started = 0 Not Needed = 13
- **Segment II - Documentation Updates: TBD**
- **Segment III - Documentation Updates: TBD**
- **Segment IV - Documentation Updates: TBD**

Planned Interfaces = 4

- Inbound Interfaces = 2
- Outbound Interfaces = 0
- Spreadsheet Uploads = 2

Data

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

Current-State:

Unique FLAIR Data Elements = 73

- **Associated Unique Uses = 193**

- Continued Use - Yes = 68
- Continued Use - No = 108
- **Associated Business Systems = 11**

Cataloged Reports = 123

- **Criticality:**

- High = 97 Med = 14 Low = 45 None = 22

Implementation:

- Conversions = TBD
- Configurations = TBD

• Training = 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.

FDLE 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	The new "Account" COA field will be replacing the GL and Object codes. Specifications for how to crosswalk GL and object codes to account in PALM needed for system remediation.	Open	6 (High/Medium)	Once information is relayed from PALM, we will have to analyze how this will affect remediation of RAMS.	Monitoring	10/31/23	Terri Speed / Ajay Katta
Data	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Open	4 (Medium/Mediur	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	None	07/01/23	Mike Moore
Technology	Development and Test instances of affected agency business systems are not available.	Open	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring	07/01/23	Andrew Gutsch
People	If funding is not approved, we will be unable to hire additional technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire staff required to complete the project.	Awaiting FY 24/25 legislative session. We have been approved for FY 23/24 Administered funds.	08/01/23	Becky Bezemek / Charlotte Fraser
Technology Data	FDLE uses Object code for various purposes. PALM is replacing this with Account. As a result it will be challenging to reconcile RAMS with PALM and get details at transaction type level.	Open	3 (High/Low)	New chart of accounts and transaction types have to be setup to fulfill PALM and FDLE accounting requirements.	Monitoring	10/31/23	Andrew Gutsch
People Processes Technology	Current systems have high visibility and are available to end customers 24/7. There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	2 (Medium/Low)	Project Manager will identify cutover schedule for all affected applications and provide detailed plans much before PALM go-live date.	Monitoring	10/31/23	Andrew Gutsch
People	New consultants and existing team do not have much knowledge of PALM and its impact.	Open	2 (Medium/Low)	Project Manager will need a plan to update everyone on PALM technical and functional features based on which teams can prepare.	Monitoring	10/31/23	Andrew Gutsch

FDLE Issues

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

FDLE 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 Data	The agency will be approved for funding to support readiness activities.	Logged	07/01/23	Office of Information and Technology Systems Office of Financial Management Agency business systems	Pending FY 24/25 Legislative Session
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.	Logged	07/01/23	Agency business systems	Monitor information as provided by PALM.
Data	PALM will provide similar funtionality as ABS Open Reports which is used for querying FLAIR and PYRL data so that we can retire those applications.	Logged	09/01/23	Office of Financial Management Office of Policy and Planning All divisional/regional business liaisons Management	Monitor information as provided by PALM.
People Processes Technology Data	PALM will provide significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT).	Logged	10/31/23	All agency business systems	Monitor information as provided by PALM.
People Processes Technology Data	The agency will be approved for administered funding to support readiness activities.	Removed	11/07/23	All agency business systems	We have been notified that our request for administered funds has been approved.

FDLE 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	Updated and submitted Operational Work Plan (OWP)	11/09/23	All Stakeholders and Systems	Submitted OWP plan to the Office of Policy and Budget to secure funds for PALM related changes in FDLE business systems	We have been notified that administered funds were approved.
People	Advisory Council	10/18/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council	Two members attended for two hours.
People	October's FDLE/PALM Readiness Touchpoint Meeting	10/25/23	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	Three members attended for one hour.
People	Project Management Liaison Forum	10/26/23	Office of Financial Management Office of Information Technology Services	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Change Management and Training Liaison Forum	10/26/23	Office of Financial Management	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Tuesday Task Talk - RW Task 504, 505, 506, and 507.	10/31/23	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for two hours and thirty minutes.
People	Tuesday Task Talk - RW Task 508 - Review Payroll Wave Business Process Models	11/07/23	Office of Financial Management	Discussed the instructions and the task overview to ensure the task is done correctly.	Four members attended for thirty minutes. One member watched the recording.
People	Discuss recruitment of contractor for PALM project	11/09/23	FDLE Business Systems	Hire all necessary staff to implement changes specific to PALM in agency business systems as soon as possible.	PALM related changes will be initiated once resources are allocated to different applications
People	Tuesday Task Talk - Addendum RW Task 504 - Update Agency Business System Documentation for Segment I RW Task 505 - Update Florida PALM Interface Inventory for Segment I	11/14/23	Office of Financial Management Office of Information Technology Services	Discussed the updates/changes to the task instructions.	Four members attended for thirty minutes.

People	Advisory Council	11/15/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for two hours.
People	December's FDLE/PALM Readiness Touchpoint Meeting	12/08/23	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Six members attended for one hour.
People	Advisory Council	12/13/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for two hours.
People	Interviews for Program Manager and Project Manager have been completed.	12/15/23	All stakeholders and Systems	Program manager will ensure all PALM mandated initiatives are being fulfilled by FDLE. Project Manager will ensure all the affected Agency Business Systems will be modified to align with PALM priorities.	Program and Project Manager have been selected and currently going through background checks. FDLE is currently waiting for these resources to formally join the project.
People Processes	SMEs Pre-meeting Account Management & Financial Reporting / System Access & Controls	11/28/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Three members attended for one hour and thirty minutes.
People Processes	SMEs Pre-meeting Contracts and Grants Management	11/29/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Three members attended for two hours.
People Processes	SMEs Pre-meeting Accounts Receivables	12/01/23	Office of Financial Management Office of Information Technology Services	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Five members attended for one hour and thirty minutes.
People Processes	SMEs Pre-meeting Disbursments Management	12/04/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Six members attended for one hour and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Disbursements Management	12/05/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Five members attended for three hours and thiry minutes.
People Processes	Segment II Financials Wave Business Process Models Review Asset Accounting & Management	12/05/23	Office of General Services	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Account Management & Financial Reporting / System Access & Controls	12/06/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Two members attended for three hours and thiry minutes.
People Processes	Segment II Financials Wave Business Process Models Review Accounts Receivables	12/07/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thiry minutes. Two members watched virtually.
People Processes	Segment II Financials Wave Business Process Models Review Contracts and Grants Management	12/07/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thiry minutes.

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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FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	01/12/24
September - October 2023	Mike Moore	mikemoore@fdle.state.fl.us	11/13/23
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23