DOS 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
November - December 2024

Agency Sponsor
Antonio Murphy

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 = 18
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness:
- **Score = 81.09%**
- Submitted Complete = 36
- Submitted Incomplete = 2
- Completed After Submission = 17

RW Task Timeliness:
- **Score = 83.7%**
- Submitted On Time = 50
- Submitted Late = 28
- Pending Submission = 0

Meeting Participation:
- Meetings Attended = 6
- 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	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	07/24/24	Not applicable.	Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	Pending Resubmission	10/04/24		Submission Incomplete	10/29/24
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/20/24	Some fields need to be completed in the workbook, but I can't locate the Mock Conversion workbook. Antonio Murphy might have permissions to see it.	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/26/24	Agency does not have any agency business systems.	Submission Complete	
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	100% - Submitted	11/22/24		Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/12/24		Submission Incomplete	12/17/24
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	100% - Submitted	11/07/24	No agency specific schedule to report. RAID log items are attached.	Submission Complete	
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	100% - Submitted	12/05/24	For assets: we have reviewed the 1200+ errors indicated. For incumbrances we will think it's a inter agency transition to DMS unsure how to resolve. Will discuss further with Project Team.	Submission Complete	12/17/24
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/05/24	Initially, we stated that we had no business systems; however, what we meant was that our business systems would be replaced or retired by PALM.	Submission Complete	12/10/24
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	11/20/24	Agency has no Agency Business Systems	Submission Complete	
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Pending Agency Sponsor Signature, will be attached.	Submission Complete	
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Updated on 11/25,moved to 50% pending question to PALM team and rewatch task talk.	Submission Complete	12/17/24
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/25/24	Updated on 11/25.	Submission Complete	11/25/24
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/25/24		Submission Complete	11/25/24
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/05/24	Reviewed and updated on 12/5. Used ticket to educated newer staff on accounting codes.	Submission Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/25/24	The workbook as locked fields. Updated and reviewed on 11/25.	Submission Complete	12/17/24
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/25/24	Workbook updated on 11/25. Security will be a byproduct role mapping.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25	100% - Submitted	01/06/25	At DoS, our business systems will be replaced by PALM, and we currently do not have any test scripts requiring testing. We aim to mark this as complete during the 12/20 DFS touchpoint meeting.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/06/25	End users are being kept informed, and the item has been attached. We're also hoping this will simplify role mapping. Jordan Clyatt topic is left blank as he is the security access manager, and won't be working inside of PALM.		01/10/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25	75% - Consolidating/Inputting Information for		We are utilizing the attached test cases as a training plan and hope to use this template to gather user stories as well		

							Information for Submission	template to gather user stories as well. We also have several staff members using PALM currently who will participate in the "Train the Trainer" program once the program details are available.		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25	Submitted 1/10.	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering		This is optional, and I'm assuming Antonio has chosen not to map grants. I think this is the workbook. https://app.smartsheet.com/sheets/cX8hVF		
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	03/28/25	100% - Submitted	01/09/25			

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 = 18

• Business Process Groupings = 10/13

Identified Subject Matter Experts = 8

Processes

Implementation:

Impacted Agency Business Processes = 10

• Related Business Process Groupings = 5/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree

• **Org Security Rule = Agencywide**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• **Optional Conversions**

- Accounts Receivable = Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

The Risks, Issues, and Assumptions tables below display only items that were marked confirmed and were opened/logged, closed/resolved or active during the reporting period.

DOS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Current staff have little knowledge of the details of current Access Database being used to extract transaction data.	Closed	6 (Medium/High)	Department currently exploring options for hiring staff with extensive Access experience to fill knowledge gaps.	The Department has received Administered funds for the purposes of preparations for Florida PALM. These funds are intended to be used for hiring a project manager and consultant to assist with agency efforts. The Department has chosen to redirect efforts to hire additional staff by bringing on OPS staff to assist with project management and system implementation. The Department has onboarded new Project Manager Marc Weeks.	03/08/24	Antonio Murphy

						Marc is currently working with End Users to understand daily functions in order to developed updated risks and change challenges.		
Processes	There is an opportunity to use UAT and Sandbox environments to cross-train employees.	Open	1 (Low/Low)	Sharing information about this opportunity appears to be the best approach to encourage adoption.			09/16/24	Marc Weeks

DOS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	End users have refined processes and a strong affinity for FLAIR. The current sentiment is, "Why fix it if it isn't broken?" I believe this could also be an issue within other organizations and state departments.	Open	Low - All impacts not listed as Critical or High	Set as an agenda item with the change champion network, this issue will be an ongoing challenge.		12/31/24	Marc Weeks
Processes	The sandbox environment lacks segregation from the production environment. Consultants need to see what end users see, but since the sandbox and production environments are the same, this creates a legitimate security concern.	Open	Low - All impacts not listed as Critical or High	Contacted DFS readiness coordinators about this matter, which is actually more of a user story than an issue.		07/29/24	Marc Weeks
Processes	The SAM (Security Access Manager) for PALM, previously an undesignated position under FLAIR, has now been identified and will transition within the Department of State's Administrative Services from Accounting to IT.	Open	Low - All impacts not listed as Critical or High	A meeting has been scheduled with the two different positions to coordinate the handoff and, with any luck, ensure a smooth transition for end users when UAT goes live. SAMs will be included in the CCN as a kind of subcommittee.	For the readiness coordinators: Other state organizations might be overlooking this issue—just a thought.	08/19/24	Marc Weeks

DOS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	Many of the tasks involve properly identifying work process flows. While we are working hard to identify these issues, it is assumed that many of them will be properly identified during UAT.	Logged	07/29/24	Current agency F&A staff	

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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DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Antonio Murphy	antonio.murphy@dos.myflorida.com	01/10/25
September - October 2024	Antonio Murphy	antonio.murphy@dos.myflorida.com	11/13/24
July - August 2024	Antonio Murphy	antonio.murphy@dos.myflorida.com	09/11/24
May - June 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	07/15/24
March - April 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	05/14/24
January - February 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	03/08/24