

**Helpful Links**

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

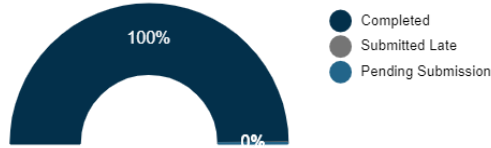
# FDLE Status Report Dashboard

Reporting Period  
September - October 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 = 7**
- Completed = 7
  - Submitted Late = 0
  - Pending Submission = 0

**People**

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

**Processes**

The sequence of procedures to accomplish a business objective.

**Technology**

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

**Data**

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

The dials below 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.

**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 = 15
- Meetings Missed = 0



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

**Implementation:**

- Training = TBD

**Current-State:**

- Cataloged Business Processes = 0**
- Related Business Systems = 0
  - Related Reports = 0
- Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

**Implementation:**

- Role Mapping = TBD

**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:**

- Interfaces = TBD

**Current-State:**

- Unique FLAIR Data Elements = 73**
- Associated Unique Uses = 193**
  - Continued Use - Yes = 21
  - Continued Use - No = 155
- Associated Business Systems = 11**
- Cataloged Reports = 112**
- Criticality:**
  - High = 90 Med = 14 Low = 42 None = 21

**Implementation:**

- Conversions = TBD
- Configurations = 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/Medium)	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.	Addition	10/31/23	Andrew Gutsch
People	Current systems have high visibility and are	Open	2	Project Manager will identify cutover schedule for all	Addition	10/31/23	Andrew Gutsch

Processes Technology	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.		(Medium/Low)	affected applications and provide detailed plans much before PALM go-live date.			
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.	Addition	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	Request for administered funds submitted in addition to LBR request.
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 functionality 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 Data	Segment I Design Workshop - Budget Mgmt / Cash Control	10/3/2023	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports for the Set up/Maintain Chart of Accounts and Enter/Process Budget Journals.	Six members attended for seven hours.
People Technology Data	Tuesday Task Talk - RW Task 326 - Update Current-State Agency Business System Inventory and Documentation	9/26/2023	Office of Financial Management Office of Information Technology Services	Understanding and documenting FDLE's business systems technical and functional specifications.	Three members attended for thirty minutes.
People	August's FDLE/PALM Readiness Touchpoint Meeting	9/7/2023	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	One member attended for one hour.
People	Advisory Council	9/20/2023	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	September's FDLE/PALM Readiness Touchpoint Meeting	9/28/2023	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	Four members attended for one hour.
People	Florida PALM Production Support Roundtable	10/12/2023	Office of Financial Management	Provide an opportunity for agency end users to meet the production team, hear about current system processes, future updates, and ask questions.	One member attended for two hours.
People	Tuesday Task Talk - RW Task 503 - Create Workforce Readiness Plan	10/17/2023	Office of Financial Management Office of Information Technology Services	Create a plan to identify and engage impacted stakeholders within your agency workforce including a communication strategy, knowledge transfer needs, and workforce attrition planning.	Three members attended for thirty minutes.
People	Advisory Council	10/18/2023	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	10/25/2023	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	10/26/2023	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	10/26/2023	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.	10/31/2023	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 Processes	Updated all Financial Mangement supervisors on PALM implementation timeline, upcoming Design Workshops, current and upcoming PALM tasks.	08/23/23	Office of Financial Management Agency business systems	Ensure updated and information is shared with the core support team.	Relayed that PALM activities will be increasing in the near future.
People Processes	Readiness Workplan Release & Walkthrough	9/14/2023	Office of Financial Management	Discussing the updated RW that aligns with the next Major Implementation and the Project activities over the remainder of the Waves.	Three members attended for one hour.
People Processes	Payroll Wave Business Process Models Review - Meeting 1 of 2	9/18/2023	Office of Financial Management	The Project team provides an overview of the process design, documented by the draft flows and narratives, for the future state payroll functions.	Four members attended in person and one member attended virtually for three hours and thirty minutes.
People Processes	Technical Town Hall	9/18/2023	Office of Financial Management Office of Information Technology Services	To provide a Project update and available resources for agency technical team members.	Three members in attendance for three hours.
People Processes	Payroll Wave Business Process Models Review - Meeting 2 of 2	9/19/2023	Office of Financial Management	The Project team provides an overview of the process design, documented by the draft flows and narratives, for the future state payroll functions.	Four members attended in person and one member attended virtually for three hours.
People Processes	Segment I Design Workshop - Disbursements Management	10/4/2023	Office of Financial Management	Review BPMs, interface layouts, and reports for entering and processing vouchers.	Five members attended for seven hours.
People Technology	Met with new Chief of Business Systems Engineering and Systems	08/24/23	Office of Information Technology Services	Provided overview of PALM project and ensure updated information is shared with the technical	Discussed FY 24/25 LBR request and request for administered funds.

	Programming Administrator to discuss LBR requests and PALM timeline.		Office of Financial Management Office of Budget and Policy Planning	system owners.	
People Technology	Tuesday Task Talk RW Task 501 - Create Agency Specific Implementation Schedule. RW Task 502 - Create Agency Specific Risks and Issues Mangement Plan.	10/10/2023	Office of Financial Management Office of Information Technology Services	Discuss the instructions and reviewing the spreadsheets to ensure the task is done correctly.	Four members attended for thirty 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:
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