DOAH Status Report Dashboard

Helpful Links
- 🔗 Dashboard Snapshots
- 🔗 Knowledge Center
- 🔗 Florida PALM Workbook for DOAH
- 🔗 Readiness Workplan

Reporting Period
September - October 2024

Agency Sponsor
Megan Silver

CCN Composition

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

Change Champion Network:
- Unique Filled Role = 6
- Duplicate Filled Role = 10
- 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 = 95.75%**
- Submitted Complete = 35
- Submitted Incomplete = 0
- Completed After Submission = 5

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 = 96.47%**
- Submitted On Time = 60
- 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 = 5
- 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	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	100% - Submitted	07/02/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/22/24		Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	10/11/24		Submission Complete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/11/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		DOAH only has Axiom Pro software as a Agency Business System. DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	09/06/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/11/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/09/24		Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/06/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/31/24		N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/04/24		N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	100% - Submitted	10/11/24		Submission Complete	
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	09/24/24		Submission Complete	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/15/24		Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	10/18/24		Submission Complete	
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/17/24		Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		DOAH only has Axiom Pro software as a Agency Business System. DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		

Direct	Data	**555-B**	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	25% - Beginning Initial Internal Meetings and Information Gathering			
N/A	N/A	**562**	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	**11/08/24**	Submission Complete	
N/A	N/A	**563**	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24				
Direct	Data	**555-C**	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24				

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 = 11

• Business Process Groupings = 11/13

Identified Subject Matter Experts = 9

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 3
- Accounts Receivable = 3
- Asset Accounting and Mgmt. = 3
- Banking = 4
- Budget Mgmt. and Cash Control = 1
- Contracts Mgmt. = 3
- Disbursements Mgmt. = 3
- Grants Mgmt. = 0
- Inter/IntraUnit Transactions = 4
- Payroll Mgmt. = 2
- Projects Mgmt. = 0
- Revenue Accounting = 3
- System Access and Controls = 2

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 26

• Related Business Systems = 0

• Related Reports = 19

• **Documentation Status:**

- Complete = 26 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 26

• Related Business Process Groupings = 6

• Planned Spreadsheet Uploads = 0

• **Level of Impact: People Changes**

- High = 0 Medium = 5 Low = 21 None = 0 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 0 Medium = 5 Low = 19 None = 2 Uncertain = 0

• **Level of Impact: Technology Changes**

- High = 0 Medium = 0 Low = 0 None = 26 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 0 Medium = 0 Low = 0 None = 26 Uncertain = 0

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

- Not Started = 0 In Progress = 0 Complete = 20

• **Segment III Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete =

Technology

Current-State:

Cataloged Business Systems = 3

• **Criticality:**

- High = 3 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

• **Segment I - Documentation Updates:**

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

• **Segment II - Documentation Updates:**

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

• **Segment III - Documentation Updates:**

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

Planned Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 1

Data

Current-State:

Unique FLAIR Data Elements = 73

• **Associated Unique Uses = 143**

- Continued Use - Yes = 49

- Continued Use - No = 39

• **Associated Business Systems = 0**

Cataloged Reports = 52

• **Criticality:**

- High = 11 Med = 25 Low = 17 None = 0

Implementation:

Segments I & II Planned Configurations = 6/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 1

• **Asset Management (AM)**

- Planned Location Codes = 15

- Planned Associated Area ID's = 60

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 59

- Planned Local Funds = None

- Planned Organization ID's = 18

- Planned OA1's = None

- Planned OA2's = None

Segment IV Planned Configurations

- Started = 1 Not Started = 1

Conversions & Data Readiness

• Conversions Needed = 8

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

• **Data Readiness/Cleansing Status:**

- Complete = 4 In Progress = 0 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.

DOAH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	If Axiom Pro is not reconfigured UAT, accountants will not be able to test to ensure functionality of the application.	Open	6 (High/Medium)	Agency Liaison will collaborate with other agencies and Image API to ensure the reconfiguration is completed prior to UAT. Agency Liaison will request status updates from Image API to ensure timeliness of end product.	Agency Liaison is collaborating with other agencies and Image API to regarding the reconfiguration.	11/07/24	Patricia Kenyon
People	Due to the staff's previous experience with system implementation, the staff's level of engagement regarding transitioning to new financial system may be low or non-existent.	Open	4 (Medium/Medium)	Agency Liaison will integrate PALM awareness through emails, meeting discussions and providing updates regarding PALM during management staff meetings. Agency Liaison will provide staff with PALM resources to become familiar with the system. SMEs and future end users will participate in Segment IV meetings and meet regularly to discuss PALM implementation in designated meetings so the conversation is focused.	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff are assisting with completing PALM tasks. DOAH future end users have been introduced to the FL PALM Knowledge Center. CNN Members, SMEs and end users participated in the Segment IV meetings and will participate in	08/28/24	Patricia Kenyon

							the Design Recap Meetings.		
People	Due to the limited number of positions, staff may not be fully trained / confident to perform their accounting functions in PALM on Go LIve Date.	Open	3 (High/Low)	DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided. SMEs have participated in Segment III and IV meetings.		Agency Liaison has integrated PALM awareness discussion during staff meetings. Accounting staff members are actively participating in completing PALM tasks. Accounting staff have been shown the PALM Knowledge Center and have reviewed the information regarding their business processes as updated by Segment updates. CCN and SMEs and future end users participated in Segment IV meetings to continue their understanding of the impact changes and will participate in the Design Recap Meetings	07/05/23	Patricia Kenyon

DOAH Issues

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

DOAH 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	Staff will be able to function in PALM on Go Live Date	Logged	09/08/23	Budget, HR and Accounting staff	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. End users attended the Segment IV Workshops to gain understanding how PALM will work. End Users have been provided awareness of FL PALM's Knowledge Center to review individually and during staff meetings as well as through emails.
Technology	Axiom Pro Application will be reconfigured to pull the vouchers in PALM by UAT	Logged	10/31/24	End Users	Agency Liaison is collaborating with other agencies and Image API to regarding the reconfiguration.

DOAH Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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

DOAH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Megan S. Silver	megan.silver@doah.state.fl.us	11/04/24
July - August 2024	Megan S. Silver	megan.silver@doah.state.fl.us	09/06/24
May - June 2024	Megan S. Silver	megan.silver@doah.state.fl.us	07/08/24
March - April 2024	Megan S. Silver	megan.silver@doah.state.fl.us	05/08/24
January - February 2024	Megan S. Silver	megan.silver@doah.state.fl.us	03/11/24