

**Helpful Links**

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOS
- Readiness Workplan

# 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**

September - October 2024

**Agency Sponsor**

Jennifer Kennedy

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- 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 = 80.25%**
- Submitted Complete = 27
- Submitted Incomplete = 2
- Completed After Submission = 11

**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 = 79.38%**
- Submitted On Time = 34
- Submitted Late = 28
- Pending Submission = 0

**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	06/20/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	07/24/24	Not applicable.	Submission Complete	09/03/24
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/03/24
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	All identified impacts on people, processes, and technology have been thoroughly assessed up to this point.	Submission Complete	10/30/24
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/05/24
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	07/26/24	Not applicable.	Submission Complete	09/05/24
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	07/24/24	Not applicable.	Submission Complete	
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	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/30/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/04/24		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
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/11/24	The agency sponsor is currently out on travel and has delegated authority for the backup sponsor to submit on her behalf.	Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	09/13/24	The meetings, risk logs, and issue logs are all up to date.	N/A	10/04/24
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/30/24		Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	25% - Beginning Initial Internal Meetings and Information Gathering		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.		
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/14/24	We hold monthly meetings with end users, the change champion network, and subject matter experts to discuss, identify, and address any issues related to the transition from FLAIR to PALM. Additionally, we are leveraging this transition to provide cross-training in both project management and accounting. The link: <a href="https://app.smartsheet.com/sheets/hh5fjv8">https://app.smartsheet.com/sheets/hh5fjv8</a>	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
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	Pending Resubmission	11/12/24		Submission Incomplete	
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	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				

N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress				
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				

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.
<p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 19</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 10/13</li> </ul> <p><b>Identified Subject Matter Experts = 8</b></p> <ul style="list-style-type: none"> <li><b>SMEs by Business Process Grouping</b></li> <li>- Account Mgmt. and Financial Reporting = 2</li> <li>- Accounts Receivable = 2</li> <li>- Asset Accounting and Mgmt. = 1</li> <li>- Banking = 2</li> <li>- Budget Mgmt. and Cash Control = 2</li> <li>- Contracts Mgmt. = 1</li> <li>- Disbursements Mgmt. = 3</li> <li>- Grants Mgmt. = 1</li> <li>- Inter/IntraUnit Transactions = 2</li> <li>- Payroll Mgmt. = 1</li> <li>- Projects Mgmt. = 1</li> <li>- Revenue Accounting = 2</li> <li>- System Access and Controls = 1</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 10</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 1</li> <li>Related Reports = 21</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 9 Partial = 0 Not Started = 1</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 10</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 5</li> <li>Planned Spreadsheet Uploads = 0</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 1 Low = 10 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 1 Low = 10 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 0 Low = 9 None = 2 Uncertain = 0</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 0 Low = 11 None = 0 Uncertain = 0</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 10 Complete = 1</li> </ul> <p><b>Segment III Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 10 Complete = 0</li> </ul>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 4</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>- High = 1 Med = 0 Low = 0 None = 1</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 0 Partial = 0 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 0</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>- Complete = 0 Updating = 0 Evaluating = 2 Not Started = 0 Not Needed = 0</li> <li><b>Segment II - Documentation Updates:</b></li> <li>- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment III - Documentation Updates:</b></li> <li>- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> </ul> <p><b>Planned Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul>	<p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 67</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 138</b></li> <li>- Continued Use - Yes = 0</li> <li>- Continued Use - No = 0</li> </ul> <p><b>Associated Business Systems = 2</b></p> <p><b>Cataloged Reports = 241</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>- High = 0 Med = 0 Low = 1 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 6/9</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>- Planned Distribution Codes = 3</li> <li><b>Asset Management (AM)</b></li> <li>- Planned Location Codes = 33</li> <li>- Planned Associated Area ID's = None</li> <li><b>Commitment Control (KK)</b></li> <li>- Planned Option = Option # 1 - Track with Budget</li> <li><b>General Ledger (GL)</b></li> <li>- Planned Budgetary Value Combo Edits = 498</li> <li>- Planned Local Funds = None</li> <li>- Planned Organization ID's = 144</li> <li>- Planned OA1's = 36</li> <li>- Planned OA2's = None</li> </ul> <p><b>Segment IV Planned Configurations</b></p> <ul style="list-style-type: none"> <li>- Started = 1 Not Started = 1</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 8</li> <li>Agency Data Outside of Primary Source System(s) = 0</li> </ul> <p><b>Data Readiness/Cleansing Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0</li> </ul> <p><b>Reports = TBD</b></p>

## 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.

DOS Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
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
People Processes	During a touchpoint meeting, readiness coordinators raised concerns about FLAIR experience being emphasized in job advertisements, given that FLAIR will be phased out in 2026. Despite this, hiring managers at the Department of State (DoS) are still seeking candidates with FLAIR experience.	Open	Low - All impacts not listed as Critical or High	A meeting with HR has been scheduled, and the Department of State (DoS) will formalize a plan to post the documentation on this line within Smartsheets.		10/21/24	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	

DOS 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 \***

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DOS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

