FDLE 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

Charlotte Fraser

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 = 6
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness:

Score = 88.33%
- Submitted Complete = 31
- Submitted Incomplete = 2
- Completed After Submission = 3

RW Task Timeliness:

Score = 88.41%
- Submitted On Time = 53
- Submitted Late = 8
- Pending Submission = 6

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	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		6/21 – Updated Task in Smartsheet; we WILL NOT meet the task due date because only half of the ABS are remediated. 6.28.24: Remediation on-going 7/8 – Progress Unchanged		
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	50% - In Progress		Assigning and analyzing information for the task.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission		Assigning and analyzing information for the task.		
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	Pending Resubmission	08/02/24	Task updated. Awaiting Sponsor Signature	Submission Incomplete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24	Task Complete	Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/13/24	Task Complete	Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	50% - In Progress				
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	Task Complete	Submission Complete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	09/03/24	Task Complete	Submission Incomplete	09/04/24
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	50% - In Progress				
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24	Task Complete	Submission Complete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/16/24	Task Complete	Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/11/24	Task Complete	Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/23/24	Task Complete	Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/09/24	Task Complete	Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/24/24	Task Complete	N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/05/24	Task Complete	N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	50% - In Progress				
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	09/23/24	Task Complete	Submission Complete	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/29/24	Task Complete	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	50% - In Progress				
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/24/24		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	11/01/24	11/12/24	100% - Submitted	11/06/24		Submission	

			Status Report						Complete	
N/A	N/A	**563**	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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 = 40
- Business Process Groupings = 13/13

Identified Subject Matter Experts = 22
- **SMEs by Business Process Grouping**
- Account Mgmt. and Financial Reporting = 1
- Accounts Receivable = 6
- Asset Accounting and Mgmt. = 3
- Banking = 1
- Budget Mgmt. and Cash Control = 8
- Contracts Mgmt. = 5
- Disbursements Mgmt. = 7
- Grants Mgmt. = 2
- Inter/IntraUnit Transactions = 8
- Payroll Mgmt. = 5
- Projects Mgmt. = 3
- Revenue Accounting = 1
- System Access and Controls = 0

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 231
- Related Business Systems = 12
- Related Reports = 74
- **Documentation Status:**
- Complete = 206 Partial = 17 Not Started = 8

Implementation:

Impacted Agency Business Processes = 231
- Related Business Process Groupings = 12
- Planned Spreadsheet Uploads = 2
- **Level of Impact: People Changes**
- High = 98 Medium = 80 Low = 28 None = 13 Uncertain = 1
- **Level of Impact: Processes Changes**
- High = 136 Medium = 62 Low = 15 None = 7 Uncertain = 1
- **Level of Impact: Technology Changes**
- High = 73 Medium = 29 Low = 13 None = 105 Uncertain = 1
- **Level of Impact: Data Changes**
- High = 87 Medium = 104 Low = 10 None = 16 Uncertain = 0
- **Segments I & II Documentation Update Status**
- Not Started = 44 In Progress = 0 Complete = 118
- **Segment III Documentation Update Status**
- Not Started = 0 In Progress = 0 Complete = 161

Technology

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 = 15
- **Segment I - Documentation Updates:**
- Complete = 7 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 7
- **Segment II - Documentation Updates:**
- Complete = 7 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 8
- **Segment III - Documentation Updates:**
- Complete = 7 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 7

Planned Interfaces = 6
- Inbound Interfaces = 2
- Outbound Interfaces = 1

Data

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:

Segments I & II Planned Configurations = 8/9
- **Accounts Receivable (AR)**
- Planned Distribution Codes = 2
- **Asset Management (AM)**
- Planned Location Codes = 19
- Planned Associated Area ID's = 57
- **Commitment Control (KK)**
- Planned Option = Option # 1 - Track with Budget
- **General Ledger (GL)**
- Planned Budgetary Value Combo Edits = 440
- Planned Local Funds = None
- Planned Organization ID's = 250
- Planned OA1's = 30
- Planned OA2's = 83

Segment IV Planned Configurations
- Started = 2 Not Started = 0

Conversions & Data Readiness
- Conversions Needed = 10
- Agency Data Outside of Primary Source System(s) = 0
- **Data Readiness/Cleansing Status:**
- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 3

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.

FDLE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
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 5/16/24: Still pending 7/22/24: No Change 8/19/24: No Change 10/14/24: No Change	05/16/24	Mike Moore
Processes Data	FDLE has good number of reports that will need to be created based on PALM objects. PALM will have "some" reports but not all that is needed.	Open	4 (Medium/Medium)	Request PALM team to provide the similar functionality of those reports / report name.	6/25/24: - Project has begun the RFP process for staff augmentation. Resource Needs: 2-BA's and 1-SA 7/2/24: - Still Pending 7/22/24 - No Change 8/19/24: Will update by 8/22/24 9/4/24: Awaiting response from Alise 10/14/24: No Change	06/25/24	Anik Datta
Processes Data	Information is needed related to the data warehouse for PALM	Open	4 (Medium/Medium)	FDLE is depending on the PALM project to provide FDLE project team information regarding the data warehouse. Mitigate this risk	6/25/24: - Reached out to our RC's for any available information. 7/22/24: No Change 8/19/24: Will update by 8/22/24 10/14/24: No Change	06/25/24	Anik Datta

Critical Operational Elements	Risk Description	Status	Priority	Response Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FDLE needs of a couple of Business Analysts to support the UAT process. Once selected the background process may hinder onboarding resources quickly.	Open	4 (Medium/Medium)	We are currently crafting RFP in support of those resources.	7/8/24: - New risk. RFP has not been posted 7/22/24: No Change 8/19/24: SOW ready, needed to review but will be posted this week. 9/16/24: OFM resume's evaluated, seven interviews scheduled. 10/1/24: ITS has 6 Interviews scheduled 10/14/24: OFM Candidates selected and is currently going through back ground check. ITS will be selecting its candidate today.	07/08/24	Mike Moore
Processes Data	Early visibility of Data Warehouse & Report Query Builder will help us to decide the future scope of custom reports for data validation (well before interface testing)	Open	4 (Medium/Medium)	Will address once PALM begins working on the Data Warehouse	8/7/24 New Risk 9/4/24: A/I for Angie to f/u 10/14/24: No Change	08/07/24	Anik Datta
Processes Technology	FDLE needs more details related to the upcoming task "Change Analysis" outlined in the Agency Implementation Roadmap, that is scheduled to commence in mid-October.	Open	4 (Medium/Medium)	Pursue more information /direction from the PALM team.	9.4.24 New Risk 9/17/24: No change 10/14/24: No Change	09/04/24	Anik Datta
Processes Technology Data	FDLE is in need of a comprehensive list of anticipated errors and warnings that may occur in relation to interface interactions and report parameters inputs.	Open	4 (Medium/Medium)	Pursue more information /direction from the PALM team. Further delay may impact our ability to meet downstream activities for example UAT.	9.4.24 New Risk 9/17/24: No change 10/14/24: No Change	09/04/24	Anik Datta
Processes Technology Data	The Technical Testing Town Hall postponement to November may affect our Interface Testing schedule for 2025. This delay will impact how FDLE prepares for testing.	Open	4 (Medium/Medium)	Accept the risk.	9.4.24 New Risk 9/17/24: No change 10/14/24: No Change	09/04/24	Anik Datta
Technology Data	Timeline for interface testing coinciding with integration testing presents a risk.	Open	4 (Medium/Medium)	Continue to watch the project timeline to see if this will change. Otherwise, we will accept the risk.	10.31.24: New Risk	10/31/24	Anik Datta
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.	Analyzing PALM account codes provided to determine if additional fields need to be utilized. 5/16/24: Still pending 7/22/24: No Change 8/19/24: No Change 10/14/24: No Change	05/16/24	Terri Speed / Andrew Gutsch
Processes Technology	The Configuration Review and Update task during UAT poses a potential risk. Changes could affect the UAT timelines and outcomes.	Open	2 (Medium/Low)	Accept the risk.	Accept the risk.	10/31/24	Anik Datta
Processes Data	The task "Update Reports Inventory" is missing from the new 'Agency Implementation Roadmap.' There is no visibility of the Data Warehouse reporting tool in the current roadmap.	Open	2 (Low/Medium)	Accept the risk.	10.31.24: New Risk	10/31/24	Anik Datta

FDLE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes	There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	Low - All impacts not listed as Critical or High	New PM onboarded and will develop cutover schedule for all affected applications and provide detailed plans much before PALM go-live date	6/21/24: Ongoing	12/31/25	Anik Datta

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.
Technology Data	FDLE assumes all PALM reports WILL match 1:1 with current FLAIR reports	Logged	08/19/24	Office of Information and Technology Systems Office of Financial Management	Monitor information as provided by PALM.

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	Weekly Internal PALM Meeting	09/03/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
Processes Technology	OFM RAMS Bi-Weekly Meeting - PALM Project	09/03/24	Office of Financial Management Office of Information Technology Services	Weekly meeting to stay abreast of business processes and utilize this knowledge for designing changes for PALM.	Eight members attended for two hours.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/04/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
People Processes	PALM Internal Agency Status Meeting	09/04/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Nine members attended for thirty minutes.
People Processes	Thursday Task Talk	09/05/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Six members attended for thirty minutes.
Processes Technology	OFM RAMS Bi-Weekly Meeting - PALM Project	09/05/24	Office of Financial Management Office of Information Technology Services	Weekly meeting to stay abreast of business processes and utilize this knowledge for designing changes for PALM.	Eight members attended for two hours.

Processes Technology	FDLE MFT Credentials Mtg	09/05/24	Office of Information Technology Services	Issue credentials for security access to server	Two members attended for thirty minutes.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/06/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/09/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
People Processes	Segment IV Design- Carry / Certified Forward and Budget Close	09/10/24	Office of Financial Management	Workshop covering Carry / Certified Forward and Budget Close	Twelve members attended for eight hours.
People Processes	Segment IV Design - Cash Check, Financial Statement Close, Budget Close	09/11/24	Office of Financial Management	Workshop covering Cash Check, Financial Statement Close, Budget Close	Eight members attended for eight hours.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/16/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	OFM RAMS Bi-Weekly Meeting - PALM Project	09/17/24	Office of Financial Management Office of Information Technology Services	Weekly meeting to stay abreast of business processes and utilize this knowledge for designing changes for PALM.	Eight members attended for two hours.
People Processes	Advisory Council	09/18/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Four members attended for two hours.
People Processes	Thursday Task Talk	09/19/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Six members attended for thirty minutes.
Processes Technology	OFM RAMS Bi-Weekly Meeting - PALM Project	09/19/24	Office of Financial Management Office of Information Technology Services	Weekly meeting to stay abreast of business processes and utilize this knowledge for designing changes for PALM.	Eight members attended for two hours.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/20/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/23/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	09/25/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/04/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/07/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/09/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
People Processes	Thursday Task Talk	10/10/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Six members attended for thirty minutes.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/11/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/14/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.
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Processes Technology	RAMS Internal Review Meeting (PALM Project)	10/25/24	Office of Information Technology Services	ITS Internal PALM Meeting	Seven members attended for one hour.

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 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	11/06/24
July - August 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/09/24
May - June 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	07/10/24
March - April 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	05/08/24
January - February 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/11/24