

Interface Approach

Overview

Interfaces refer to data exchanges between Florida PALM and external business systems. Florida PALM will interface with agency business systems, enterprise partners (e.g., MFMP, People First) and third parties (e.g., banks). Agencies are responsible for gaining an understanding of planned Florida PALM functionality, making decisions about how the agency will provide or consume Florida PALM information, and preparing agency business systems for interfacing with Florida PALM. This approach describes Project and agency activities to prepare for interfacing with Florida PALM.

Background

Some considerations, terminology, and general expectations are provided below to support agency planning for interfaces.

- Agencies can provide information to Florida PALM in multiple ways including end user manual input; end user spreadsheet upload (in some cases) on an on-demand basis; and inbound interfaces (using standard file layouts) on a recurring basis.
- Agencies can consume Florida PALM information in multiple ways including end user online inquiry in Florida PALM; end user access to reports or queries (e.g., data extracts or online results) in Florida PALM or the Data Warehouse; or outbound interfaces (using standard file layouts) on a recurring basis.
- Interfaces require the use of standard file layouts (e.g., fixed, delimited, or XML formats) and are used on a recurring basis. Available interfaces are described in the business process models and/or the Catalog of Interface Offerings (Catalog). Access to the Catalog is available in Smartsheet, for individuals requested by the Agency Liaisons.
- Web services refers to the use of XML messages to send or receive data for a single transaction in real-time or near real time. Use of web services will be very limited until after Florida PALM stabilization. The Project will provide more information, via the Catalog, if any web services will be offered.
- Spreadsheet uploads require the use of a prescribed Excel template for agency end users to upload data, on an as needed basis, to Florida PALM. These templates are available for certain business processes as identified in the business process models.
- Agency business system refers to information technology applications or databases used to manage agency or enterprise activities or transactions. Business systems may also be used as a data source for end user information needs. This term is used to describe any source or target for interfaces with Florida PALM.
- Databases or data warehouses refer to collections of data used by agency end users with reporting tools to meet information needs. The [Reporting Approach](#) provides more information about the replacement of the Information Warehouse. A Data Warehouse is planned for Florida PALM which will provide agency end users with access to standard reports and reporting tools to support self-service information needs. End users will use pre-defined or user-defined queries to produce data extracts of Florida PALM information. These data extracts will be available in multiple formats to support use in external processes.
- Florida PALM records data in the General Ledger and the submodules, and uses hierarchical relationships (e.g., trees and attributes) to support reporting objectives. The legacy Chart of Accounts (COA) will be retired, and the Florida PALM COA implemented

for CMS Wave will be expanded to include additional data elements and values to account for additional activities.

Project Activities

The Project will publish or share resources critical to agency preparation and remediation activities. The Project will complete a series of implementation activities and develop interface file layouts, which are necessary to agencies for remediation and readiness activities. The Project will update the schedule, timeline, and Readiness Workplan for agencies when the requirements review and related activities are completed. To support agency planning for the availability of Project resources, the Project's implementation steps are described below:

- Requirements Review – The Project and agencies will meet to discuss agency-unique agency business needs and questions as part of Personalized Agency Working Sessions. The Project will validate, update and disposition requirements. The requirements are subject to approval by the Executive Steering Committee.
- Functional Design – The Project will create the solution design based on the approved requirements and update the Catalogs for interfaces, conversions and reports.
- Build – The Project will develop interface file layouts and other integral items (e.g., reports, conversions, extensions, forms, workflows) based on the solution design. The Florida PALM interface file layouts will be shared with agencies for use in their preparation and remediation activities for agency business systems. The interface file layouts will describe the data elements and processing logic and include relevant metadata such as field size.
- Testing – The Project will conduct end to end testing, mock conversions, and prepare applicable users for User Acceptance Training (UAT). Opportunities for agency interface testing is described below.
- Training – The Project will offer resources and training opportunities by Florida PALM role.
- Go-Live Readiness – The Project will coordinate with agencies and enterprise partners for staging and cut-over activities, dry runs and conversions.

Agency Activities

Agencies are responsible for assessing the agency's information and selecting the Florida PALM interfaces needed to support agency business systems. The Project will provide information and engagement opportunities to support agency understanding of the Florida PALM solution and expectations for specific interfaces. Agencies should involve functional and technical subject matter experts (SMEs) to understand current and future state business operations and identify agency-specific change impacts. The SMEs should assist in assessing information needs and change impacts for the entire agency, including programmatic or division users of legacy reports or information.

Each agency will likely prepare for remediation activities differently. This approach describes some recommended steps to support agencies in their planning and remediation activities for using Florida PALM interfaces. Agencies are expected to use Florida PALM information and engagements to develop agency specific approaches and remediation plans to prepare agency business systems, processes and users for Florida PALM implementation.

Assess Current Operations

The Agencies should assess their current operations to identify their business and information needs. This assessment includes identification of agency business systems, databases, operational processes, and data warehouses that use legacy FLAIR data. Agencies should also identify and evaluate the information types, formats, and sources of information used by agency end users and other stakeholders. A self-assessment guide, the [Understanding Agency Unique Processes](#), is available to support agency evaluation of current operations and identification of agency-specific business needs. Agencies should identify current agency business systems that interface with FLAIR or contain FLAIR data. The [Business Case for Maintaining Agency Business Systems](#) completed in 2016 may be a helpful resource for agencies, but agencies should consider new systems and processes implemented since this Business Case was completed.

Understand the Florida PALM Solution

Agencies need to understand the planned functionality of Florida PALM. Agencies should participate in engagements with the Project and share and review published or shared resources. Key resources essential to agency understanding of Florida PALM (starting from legacy operations to Florida PALM business process, interfaces, reports, and data for increasing granularity), include the following:

- [Pathfinder](#) – The Pathfinder is a tool to help agencies chart a path for their unique journey towards transformation. The tool connects Florida PALM business processes, interfaces and reports to legacy information. Based on an understanding of current agency business needs, relevant Florida PALM business processes, interfaces and reports can be identified.
- [Standardized Business Process Models](#) – The Business Process Models provide a narrative and visual diagram of the business processes that will be implemented in Florida PALM. The [Module Workgroups](#) included review of business process models by Florida PALM module. Recordings, presentations and other materials are available to support understanding of planned functionality. These materials offer a general understanding of how Florida PALM business processes will accomplish various business needs.
- Catalog of Interface Offerings – The Catalog of Interface Offerings provides interface information such as business process area, whether it contains chart of accounts information, sample data, and the file layouts. Agency Liaisons can request access for agency users to this Catalog, in Smartsheet.
- [Reports Catalog](#) – The Reports Catalog describes the planned reports available to agency and enterprise users. In considering how to consume Florida PALM information for interface selection, agencies should also review the types of information available through reports, queries, or online inquiries.
- [Data Dictionary](#) – The Data Dictionary describes the data elements in use for CMS Wave. The Data Dictionary will be updated for additional data elements used for Financials and Payroll Wave.

Develop and Execute Adoption Plans

Agencies are responsible for developing an approach to adopt Florida PALM for agency operations. Based on understanding of current business needs and planned Florida PALM functionality for Financials Wave and Payroll Wave. Agencies will decide how to provide and consume Florida PALM information. Generic versions of interface file layouts and preliminary business process models are available to support a general understanding of Florida PALM functionality.

The Project will notify agencies when interface file layout designs are complete and ready for remediation of business systems. Agencies are responsible for identifying the specific interfaces needed for each agency business system. In some instances, it may take more than one interface from Florida PALM for agencies to receive the data needed for business systems. Agencies are responsible for developing and executing remediation plans for business systems to manage the change in data elements, data values, and business processes.

Build and Test Interfaces

Agencies will be provided access to a Florida PALM UAT environment with Financials Wave and Payroll Wave functionality prior to go-live. This environment will be available to support agency understanding of the Solution and facilitate agency-directed testing activities. Agencies should use the UAT environment to conduct end-to-end testing, including testing agency interfaces for agency-created scripts, supporting end user understanding of Florida PALM and their duties (scripts are encouraged), and as a resource to support agency activities to plan and change agency-specific business processes and end user resources, such as desktop procedures and checklists. Enterprise partners will also participate in UAT activities.

Train and Stage Activities

Agencies will assign end users to complete Florida PALM training. Agencies are responsible for training end users for agency-specific processes and expectations. The Project will coordinate with agencies for conversions and cut over activities. Agencies will be provided more information for interfacing with Florida PALM, such as batch schedules, file naming conventions, and agency expectations for addressing file and transaction errors.

Resources

The Project has provided or published various resources to support agency planning and preparation activities. Some materials, such as interface layouts, are subject to change based on approved requirements and functional designs.