Reporting Solution

Reports and reporting tools will be available through Florida PALM and the Data Warehouse (DW). The scope of each is described below:

- Florida PALM refers to the PeopleSoft functionality. that will replace the legacy accounting systems, including Central FLAIR, Departmental FLAIR, and Payroll (PYRL). Florida PALM will offer pre-built reports, online inquiry screens, and WorkCenters. Interfaces are available for agencies to obtain operational data needed to support agency business systems, databases, or warehouses. Florida PALM reports are critical to daily operations and offer near real-time or real-time data.
- DW, and alternatively Data Warehouse and Business Intelligence (DW/BI), is a component of the overall Florida PALM solution. The DW uses Oracle Analytics Cloud (OAC) to offer pre-built reports, self-service reporting tools and access to Florida PALM and FLAIR data. The DW will replace the legacy Information Warehouse (IW) which will be retired with the transition from FLAIR. The IW data will be updated in Florida PALM upon the completion of cutover activities. The IW will be retired, and no further updates will be made to that data. The DW will receive nightly data refreshes from Florida PALM.

Reports

Reports are available to agencies in Florida PALM and the Data Warehouse. The term, report, is used generically to refer to all types and formats (query or print-ready).

Information previously maintained in the Reports Catalog (i.e., report descriptions and samples) is now included in the Knowledge Center for those available to agencies as part of Financials and Payroll Wave. More information and samples will be added as work is completed.

Report Types

Reports can have a single purpose or overlapping objectives. This Reporting Approach categorizes reports based on the type of information it includes or how it will be used. When new reports are created, the report objective is important in choosing the appropriate report source and reporting tool. These report types are described below:

- **Operational reports** - describe the Florida PALM reports used to support ongoing business processes. These reports include balance information, transaction details, status information, errors, and more. The focus of these reports is to support daily and monthly activities, especially for needs that require the latest information.

- **Statutory reports** - refer to the reports mandated by law or rule. These reports are used to measure or report compliance with specific requirements. The format is often prescribed and must be sent to specified parties (outside of the agency or enterprise partner responsible for creating or publishing the report). The State has numerous statutory reports that have corresponding operational reports used by agencies to monitor compliance on an ongoing basis in preparation for the enterprise or scheduled reports to external parties.

- **Analytical reports** - refer to the reports that use logic to summarize information in a manner to support monitoring or decision-making activities. These reports answer specific questions about the data, rather than provide all transaction details.

- **Historical reports** - refer to reports that compare balances or activities over multiple fiscal years. These reports may include research for specific transactions, or activities occurring in the past, to support current-day activities or reporting. This term is used to refer to reports that include FLAIR information (which will be available in the DW).

- **Strategic reports** - refer to those intended to support higher-level decision-making rather than meet day-to-day operational needs. These reports are usually presented at a summarized level. The information is rolled up at a higher level based on the needs of the target user.

Data

For reporting, three populations of data are relevant, as described below:

- Florida PALM data refers to the data processed as part of operations.
- The DW will have a subset of the Florida PALM data. Not all Florida PALM fields and not all activities are available in the DW as part of the delivered integrations between PeopleSoft and OAC. DW data is organized by subject areas with logical groupings to support drag and drop reporting.
- Legacy FLAIR data from the IW will be recorded in the DW. This information will not be updated after FLAIR activities are completed. This static data will be maintained in its FLAIR structure and will be available to authorized users for self-service.

Report Complexity

Reports requiring complex calculations, or the use of business intelligence (BI) will generally be created from the DW. In instances where real-time data is needed, the report will be created from Florida PALM.

Key Reporting Tools

The key reporting tools available to users include the following:

- People Soft (PS) Query provides a user-friendly, intuitive way to generate ad-hoc and custom reports.
- Business Intelligence Publisher (BIP) is a SQL-based reporting tool meant for exporting highly formatted, pixel-perfect reports. It is ideal for reports that require specific layouts.
- BI Classic is a drag and drop reporting tool in used in OAC. This tool uses dynamic prompts that allow for on-screen analysis.

Comparison of Florida PALM & Data Warehouse

A comparison of the Florida PALM and DW reporting solution is provided as part of Table 1 – Reporting Solution Overview. This table uses the key terminology described in this section.

Table 1: Reporting Solution Overview

	Florida PALM (PeopleSoft)	**Data Warehouse (OAC)**
Report Type(s)	Primarily Operational Other types if real-time data is needed	Primarily Analytical, Statutory, Historical, and Strategic
Florida PALM Data	Operating data used in FIN & HCM Modules	Subset of Florida PALM Data (master data, balances,

	Florida PALM (PeopleSoft)	Data Warehouse (OAC)
		completed transactions) with key data fields
Legacy Information	Limited to information loaded as part of conversions	Includes separate section for information loaded from the FLAIR IW Data
Data Refresh Schedule	Real-time or near real-time data available for reports	Nightly data refreshes (next day data available for reports)
Report Complexity	Mostly simple calculations or logic; few BI reports	Simple to complex calculations or logic; more BI reports
Key Reporting Tools	PS Query; BIP	BI Classic, BIP

User Experience

Report Access

Access to reports is based on roles. Florida PALM reporting roles are referred to as Reporter and Query Writer. The DW has similar roles, Consumer and Author. More information will be shared at a later data about these reporting roles.

The Florida PALM and DW reporting solution will be available to authorized users via a web browser. Enterprise partner and agency decisions about role assignments will dictate the level of access a user has to specific reports or reporting functionality. All reports will default to online viewing and users will be required to access Florida PALM or the DW to see the reports. All reporting roles are inquiry-only and do not allow for record updates. The role capabilities are described below:

- Reporter/Consumer capabilities include the following actions: run a report; sort and filter a report; schedule a report; share a report via email; print or download a report; choose an output type; and add reports as favorites.
- Query Writer/Author capabilities include the following actions: create a query; modify an existing query; and publish a query (for DFS Enterprise users). These users can significantly impact system performance with overly large, complex, or illogical query requests.

Report Output Types

Users can choose the report output types based on their specific need. The output types most expected for use in Florida PALM and the DW are Excel (.xls), Portable Document Format (.pdf), which is a print-ready format, and Comma Separate Values (.csv) format, which is a text file that has a specific format which allows data to be saved in a table structured format. The .csv format is most often used for large data extracts. All output types (query or print-ready reports) are referred to as reports.

Users will inherently be able to export reports. Data extracts are subject to default or configured row limits (usually 200,000 rows). The DW reporting tools are designed to support analysis and targeted data extracts, rather than obtaining entire populations of transaction data to support replication outside Florida PALM and the DW. Users should use filters to retrieve the minimum number of rows needed in the report.

Report Scheduling & Distribution

Users can schedule their own reports and set up email alerts after go-live. Reports can be scheduled to be delivered automatically via various channels, including the user's web browser, email or mobile device. Email alerts can be set by users who can choose to download or print reports and distribute them via email or other methods.

Report Filtering & Sorting

Parameters are offered to provide users flexibility for targeting information specific to agency needs.

Report Navigation Preferences

To enhance the user experience, functionality exists for users to 'Favorite' reports and reduce the amount of navigation within Florida PALM or the DW.

Record Retention & Archival

Information processed in Florida PALM will be retained in accordance with record retention requirements. Record archival processes and guidance will be developed as part of Optional Services (after Financials and Payroll Waves). The Project has shared with agencies that they will continue to be responsible for retention of their financial information, and documentation that supports those transactions and activities.

Resources

The Knowledge Center includes resources to support understanding of reports and data, including the following:

- Report descriptions and samples (i.e., updates are ongoing for DW reports as they are completed)
- Outbound interface file layouts (from Florida PALM) that include data fields and definitions, configured data values (such as status codes), and sample data
- Life cycle diagrams for business process events
- Data structure diagrams that describe how the Florida PALM records are set up
- Data configuration values which are specific to Florida PALM
- Chart of Accounts structure which includes mapping to the related legacy data fields
- Chart of Accounts Values for system values (not agency-specific values like organization code)
- Legacy data mappings which are identified for the conversion file layouts

Additional resources, such as a Data Dictionary, will be shared when relevant work is completed in Florida PALM. Likewise, information specific to the Data Warehouse will be shared when that work is complete.