

## Dashboard Overview

A <Agency> Monthly Progress Report dashboard (example shown below in Figures 1 and 2) has been created within your agency's Florida PALM Workbook in Smartsheet. The Monthly Progress Report dashboard provides a high-level view of your agency's reported testing activity and data readiness progress and serves as the tool for your Primary Agency Sponsor to confirm and submit your agency's progress each month.

The <Agency> Monthly Progress Report dashboard is designed to allow agencies to confirm progress of interface testing and data readiness activities. The dashboard has and is expected to continue to evolve over time to display relevant data and metrics related to activities including participation in UAT, full integration testing, training, and cutover.

### Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

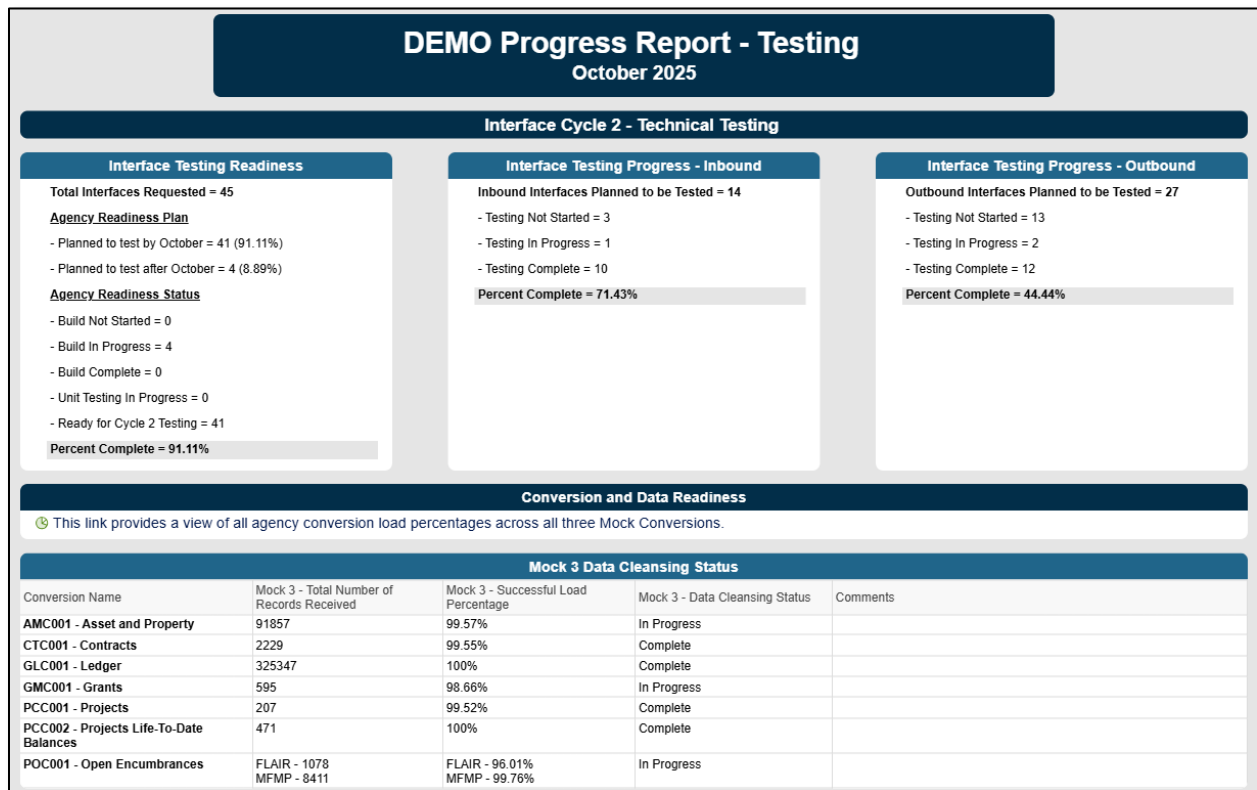


Figure 1: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 1)

| Submission                                                                                                                                                                                                                                        |                      |                                                                                                                                                                                                                                                               |                    |                  |                      |               |                    |             |            |                              |          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------------------|----------------------|---------------|--------------------|-------------|------------|------------------------------|----------|
| <b>Primary Agency Sponsor Confirmation</b>                                                                                                                                                                                                        |                      | <b>DEMO Progress Report Confirmation</b>                                                                                                                                                                                                                      |                    |                  |                      |               |                    |             |            |                              |          |
| <p>As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's progress testing report. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.</p> |                      | <table border="1"> <tr> <td>Reporting Period</td> <td>Agency Sponsor Name:</td> <td>Confirmed By:</td> <td>Confirmation Date:</td> </tr> <tr> <td>August 2025</td> <td>John Smith</td> <td>floridapalm@myfloridacfo.com</td> <td>07/30/25</td> </tr> </table> |                    | Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: | August 2025 | John Smith | floridapalm@myfloridacfo.com | 07/30/25 |
| Reporting Period                                                                                                                                                                                                                                  | Agency Sponsor Name: | Confirmed By:                                                                                                                                                                                                                                                 | Confirmation Date: |                  |                      |               |                    |             |            |                              |          |
| August 2025                                                                                                                                                                                                                                       | John Smith           | floridapalm@myfloridacfo.com                                                                                                                                                                                                                                  | 07/30/25           |                  |                      |               |                    |             |            |                              |          |
| <p>Agency Sponsor Name: *</p> <input type="text"/>                                                                                                                                                                                                |                      |                                                                                                                                                                                                                                                               |                    |                  |                      |               |                    |             |            |                              |          |
| <input type="checkbox"/> Confirm *                                                                                                                                                                                                                |                      |                                                                                                                                                                                                                                                               |                    |                  |                      |               |                    |             |            |                              |          |
| <input type="button" value="Submit"/>                                                                                                                                                                                                             |                      |                                                                                                                                                                                                                                                               |                    |                  |                      |               |                    |             |            |                              |          |
| <a href="#">Privacy Policy</a>   <a href="#">Report Abuse</a>                                                                                                                                                                                     |                      |                                                                                                                                                                                                                                                               |                    |                  |                      |               |                    |             |            |                              |          |

Figure 2: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 2)

The Monthly Progress Report dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- <Agency> Cycle 2 Technical Interface Testing
- <Agency> Interface Test Planning
- <Agency> Mock Conversions

## Interface Cycle 2 - Technical Testing Section

The Interface Cycle 2 - Technical Testing section (Figure 3) is designed to help you understand your agency's current interface testing progress and status.

| Interface Cycle 2 - Technical Testing                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Interface Testing Readiness</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>Interface Testing Progress - Inbound</b>                                                                                                                                                                                          | <b>Interface Testing Progress - Outbound</b>                                                                                                                                                                                           |
| <p>Total Interfaces Requested = 45</p> <p><u>Agency Readiness Plan</u></p> <ul style="list-style-type: none"> <li>- Planned to test by October = 41 (91.11%)</li> <li>- Planned to test after October = 4 (8.89%)</li> </ul> <p><u>Agency Readiness Status</u></p> <ul style="list-style-type: none"> <li>- Build Not Started = 0</li> <li>- Build In Progress = 4</li> <li>- Build Complete = 0</li> <li>- Unit Testing In Progress = 0</li> <li>- Ready for Cycle 2 Testing = 41</li> </ul> <p>Percent Complete = 91.11%</p> | <p>Inbound Interfaces Planned to be Tested = 14</p> <ul style="list-style-type: none"> <li>- Testing Not Started = 3</li> <li>- Testing In Progress = 1</li> <li>- Testing Complete = 10</li> </ul> <p>Percent Complete = 71.43%</p> | <p>Outbound Interfaces Planned to be Tested = 27</p> <ul style="list-style-type: none"> <li>- Testing Not Started = 13</li> <li>- Testing In Progress = 2</li> <li>- Testing Complete = 12</li> </ul> <p>Percent Complete = 44.44%</p> |

Figure 3: Interface Cycle 2 - Technical Testing Section

## Interface Testing Readiness

The Interface Testing Readiness box (Figure 4) displays your agency's Interface Cycle 2 – Technical Testing readiness plans and readiness progress maintained in your <Agency> Interface Test Planning worksheet. The Interface Testing Readiness box includes:

- The total number of interfaces requested by your agency
- The Agency Readiness Plan data, showing:
  - The number of interfaces your agency planned to be ready for testing by October and the related percentage (planned to test by October / total number interfaces requested)
  - The number of interfaces your agency planned to be ready for testing after October and the related percentage (planned to test after October / total number interfaces requested)
- The Agency Readiness Status data, showing:
  - The agency-reported Cycle 2 Test Readiness status for all requested interfaces
  - The percent complete calculates the percentage of interfaces that are ready to be tested (Ready for Cycle 2 Testing / Interfaces Requested)

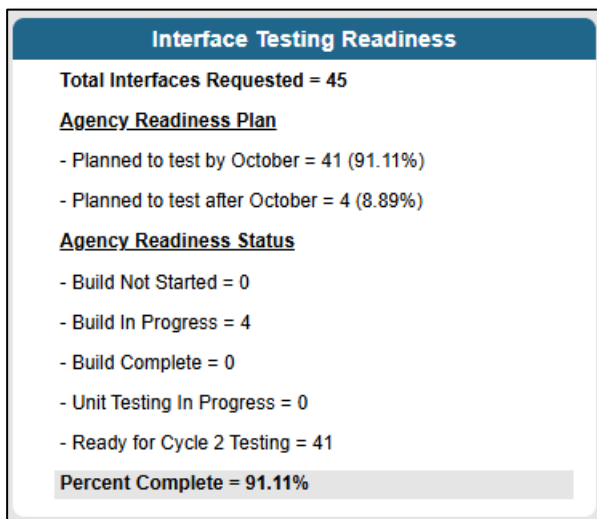


Figure 4: Interface Testing Readiness Section

## Interface Testing Progress – Inbound/Outbound

The Interface Testing Progress – Inbound/Outbound boxes (Figure 5) display, grouped by the direction of the interface (e.g., into Florida PALM, out from Florida PALM), status of interfaces tested. The data displays your agency's interface testing progress maintained in your <Agency> Cycle 2 Technical Interface Testing worksheet.

- *Testing Not Started* indicates the count of interfaces that are planned to be tested (i.e., needed for go live) but testing has not started.
- *Testing in Progress* indicates the count of interfaces that are currently undergoing testing activities.
- *Testing Complete* indicates the count of interfaces that have had at least one successful test.
- *Percent Complete* indicates the percentage of interfaces that have had at least one successful test (Testing Complete / Inbound (Outbound) Interfaces Planned to be Tested).

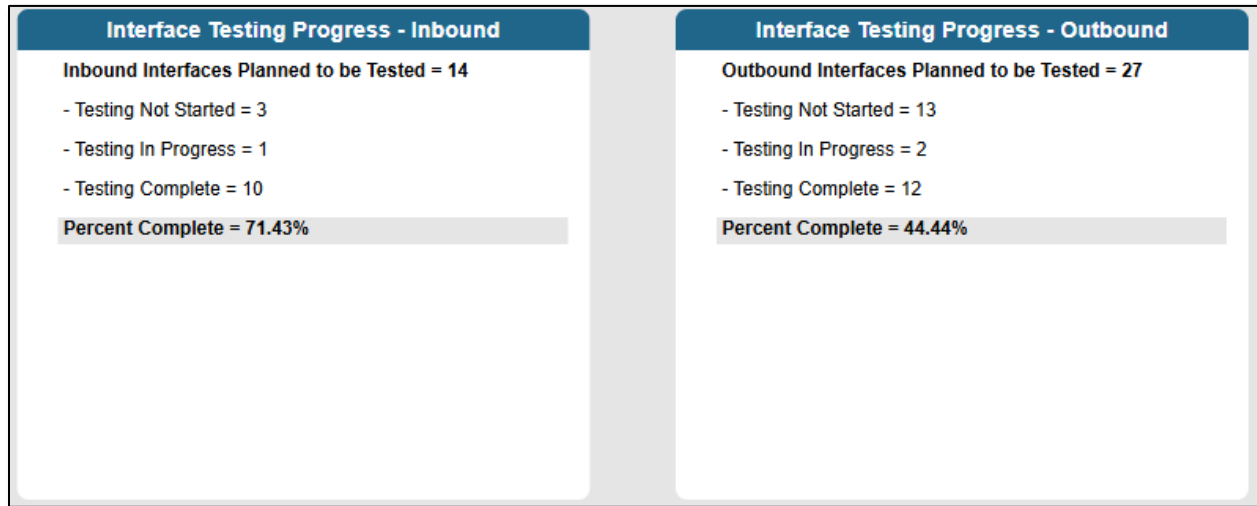


Figure 5: Inbound/Outbound Interface Testing Section

**NOTE:** The following agencies with no planned interfaces will not have an Interface Cycle 2 - Technical Testing Section: DOEA, DOS, EOG, FSDB, and PSC.

## Conversion and Data Readiness Section

The Data Readiness section (Figure 6) is designed to help you understand your agency's current data readiness progress and status.

| Conversion and Data Readiness                                                                          |                                           |                                     |                                |          |
|--------------------------------------------------------------------------------------------------------|-------------------------------------------|-------------------------------------|--------------------------------|----------|
| This link provides a view of all agency conversion load percentages across all three Mock Conversions. |                                           |                                     |                                |          |
| Mock 3 Data Cleansing Status                                                                           |                                           |                                     |                                |          |
| Conversion Name                                                                                        | Mock 3 - Total Number of Records Received | Mock 3 - Successful Load Percentage | Mock 3 - Data Cleansing Status | Comments |
| AMC001 - Asset and Property                                                                            | 91857                                     | 99.57%                              | In Progress                    |          |
| CTC001 - Contracts                                                                                     | 2229                                      | 99.55%                              | Complete                       |          |
| GLC001 - Ledger                                                                                        | 325347                                    | 100%                                | Complete                       |          |
| GMC001 - Grants                                                                                        | 595                                       | 98.66%                              | In Progress                    |          |
| PCC001 - Projects                                                                                      | 207                                       | 99.52%                              | Complete                       |          |
| PCC002 - Projects Life-To-Date Balances                                                                | 471                                       | 100%                                | Complete                       |          |
| POC001 - Open Encumbrances                                                                             | FLAIR - 1078<br>MFMP - 8411               | FLAIR - 96.01%<br>MFMP - 99.76%     | In Progress                    |          |

Figure 6: Data Readiness section

A link is provided (Figure 7) to a separate report that displays the percentage of all the agencies' conversion records that successfully loaded in each Mock Conversion cycle, as shown in agency's <Agency> Mock Conversions worksheets.

| Conversion and Data Readiness                                                                          |
|--------------------------------------------------------------------------------------------------------|
| This link provides a view of all agency conversion load percentages across all three Mock Conversions. |

Figure 7: Combined Agency Conversion Load Percentages section

**NOTE:** A load percentage for GLC001 is only available for Mock Conversion 3. GLC001 – Ledger was not run in Mock Conversion 1 and a load percentage was not provided to agencies for Mock Conversion 2 due to the data fixes that were implemented by the Project

## Mock 3 Data Cleansing Status

The Mock 3 Data Cleansing Status box (Figure 8) displays your agency's data cleansing progress for Mock 3, maintained in your <Agency> Mock Conversions worksheet. The data shows the conversion name, the total number of records received from the source system for the Mock Conversion, the percentage of records that successfully loaded for the Mock Conversion, your agency's reported status of data cleansing, and any comments related to your agency's data cleansing progress.

- **In Progress** indicates your data cleansing efforts have begun.
- **Complete** indicates your data cleansing efforts are complete.

| Mock 3 Data Cleansing Status            |                                           |                                     |                                |          |
|-----------------------------------------|-------------------------------------------|-------------------------------------|--------------------------------|----------|
| Conversion Name                         | Mock 3 - Total Number of Records Received | Mock 3 - Successful Load Percentage | Mock 3 - Data Cleansing Status | Comments |
| AMC001 - Asset and Property             | 91857                                     | 99.57%                              | In Progress                    |          |
| CTC001 - Contracts                      | 2229                                      | 99.55%                              | In Progress                    |          |
| GLC001 - Ledger                         | 325347                                    | 100%                                | Complete                       |          |
| GMC001 - Grants                         | 595                                       | 98.66%                              | In Progress                    |          |
| PCC001 - Projects                       | 207                                       | 99.52%                              | Complete                       |          |
| PCC002 - Projects Life-To-Date Balances | 471                                       | 100%                                | Complete                       |          |
| POC001 - Open Encumbrances              | FLAIR - 1078<br>MFMP - 8411               | FLAIR - 96.01%<br>MFMP - 99.76%     | In Progress                    |          |

Figure 8: Mock 3 Data Cleansing Status

**NOTE:** If a conversion is 'Not Applicable' to your agency, it will not be visible on the dashboard.

## Submission Section

The Submission Section (Figure 9) includes a form for your Primary Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

| Submission                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |                                                                                                                                                                                                                                                                                                        |                    |                  |                      |               |                    |             |            |                              |          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------------------|----------------------|---------------|--------------------|-------------|------------|------------------------------|----------|
| <b>Primary Agency Sponsor Confirmation</b> <p>As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's progress testing report. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.</p> <p>Agency Sponsor Name: *</p> <input type="text"/> <p><input type="checkbox"/> Confirm *</p> <p><input type="button" value="Submit"/></p> <p><a href="#">Privacy Policy</a>   <a href="#">Report Abuse</a></p> |                      | <b>DEMO Progress Report Confirmation</b> <table border="1"> <tr> <th>Reporting Period</th> <th>Agency Sponsor Name:</th> <th>Confirmed By:</th> <th>Confirmation Date:</th> </tr> <tr> <td>August 2025</td> <td>John Smith</td> <td>floridapalm@myfloridacfo.com</td> <td>07/30/25</td> </tr> </table> |                    | Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: | August 2025 | John Smith | floridapalm@myfloridacfo.com | 07/30/25 |
| Reporting Period                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Agency Sponsor Name: | Confirmed By:                                                                                                                                                                                                                                                                                          | Confirmation Date: |                  |                      |               |                    |             |            |                              |          |
| August 2025                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | John Smith           | floridapalm@myfloridacfo.com                                                                                                                                                                                                                                                                           | 07/30/25           |                  |                      |               |                    |             |            |                              |          |

Figure 9: Submission Section

## Primary Agency Sponsor Confirmation

The Primary Agency Sponsor Confirmation (Figure 10) allows for easy submission of the Monthly Progress report. The confirmation should only be submitted by the Primary Agency Sponsor.

**NOTE:** *This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Primary Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration. The confirmation form will be enabled to allow submission no earlier than five business days before the task is due and will close promptly the business day after the task is due.*

Figure 10: Primary Agency Sponsor Confirmation

## Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation box (Figure 11).

| DEMO Progress Report Confirmation |                      |                              |                    |
|-----------------------------------|----------------------|------------------------------|--------------------|
| Reporting Period                  | Agency Sponsor Name: | Confirmed By:                | Confirmation Date: |
| September 2025                    | John Smith           | floridapalm@myfloridacfo.com | 09/25/25           |
| August 2025                       | John Smith           | floridapalm@myfloridacfo.com | 08/27/25           |

Figure 11: Agency Sponsor Confirmation Report