Dashboard Overview

An *<Agency> Monthly Progress Report* dashboard (example shown below in Figures 1 - 8) 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 testing, training, and cutover activities including reported interface and user story testing activity, role mapping, business process documentation updates, training preparation, conversion, and configuration data readiness, risk and issue management, and cutover preparation. The dashboard also serves as the tool for your 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 testing, training, and cutover 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, data cleansing, training, deployment, and cutover.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

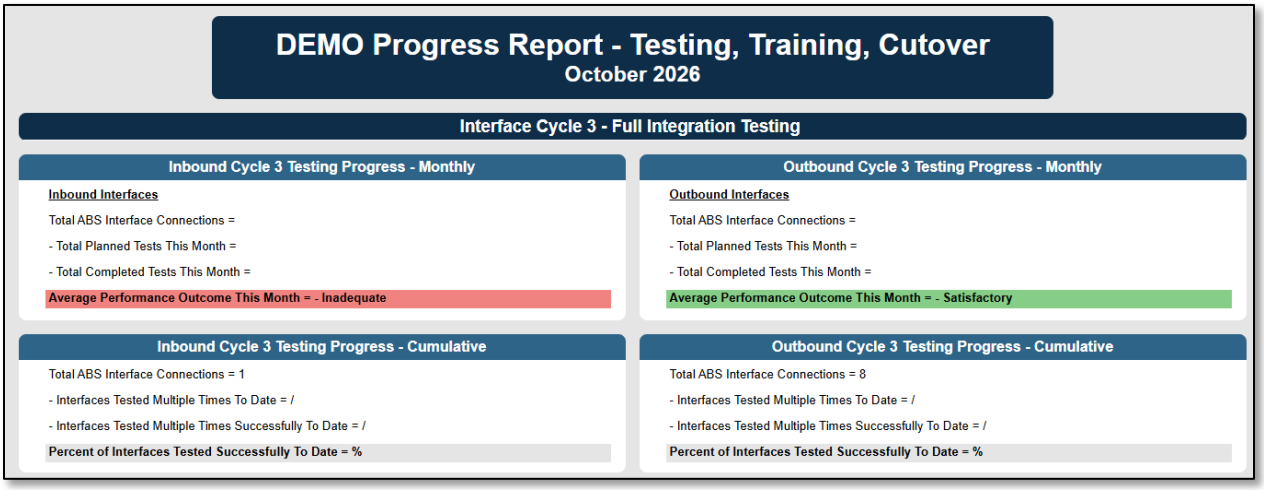


Figure 1: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 1)

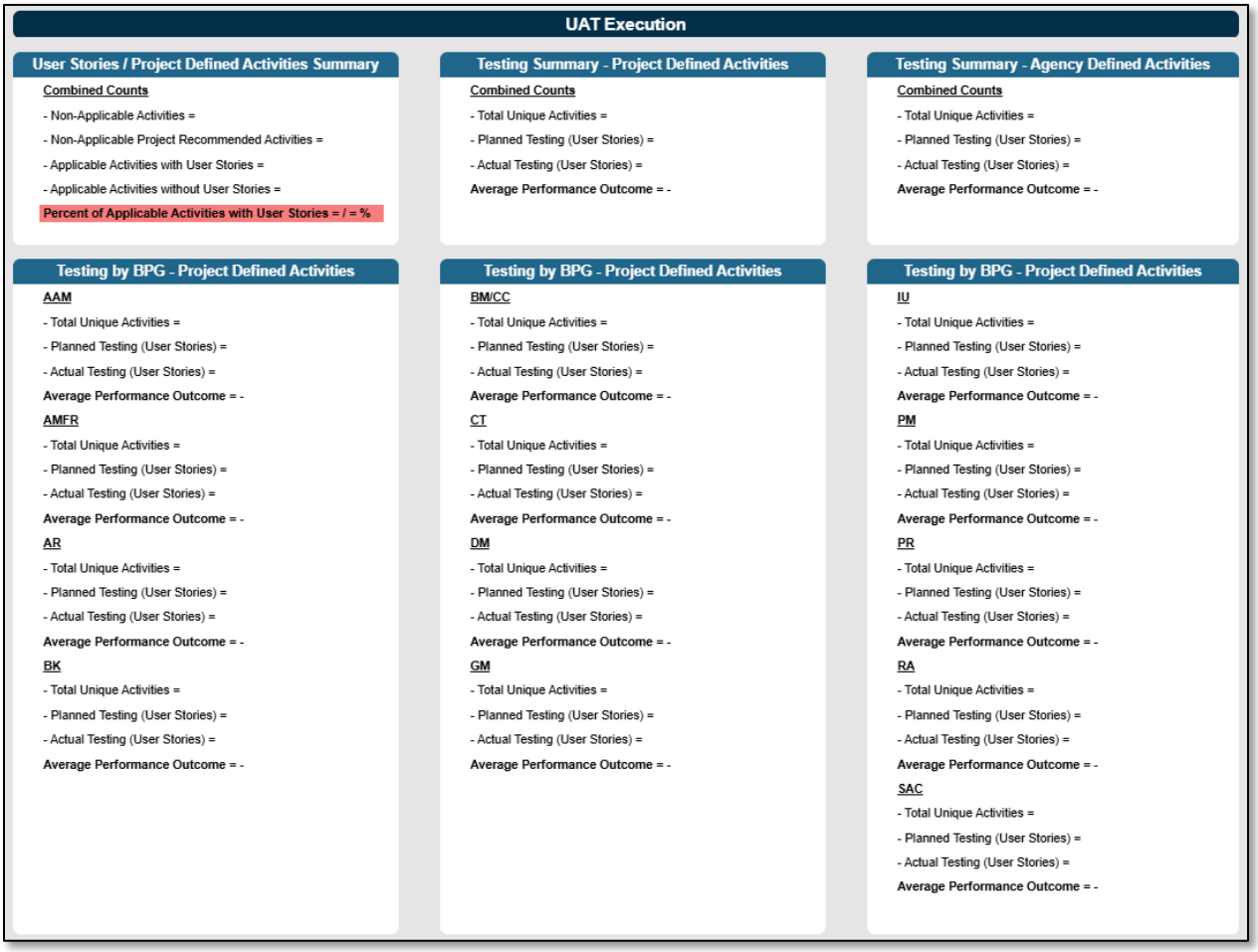
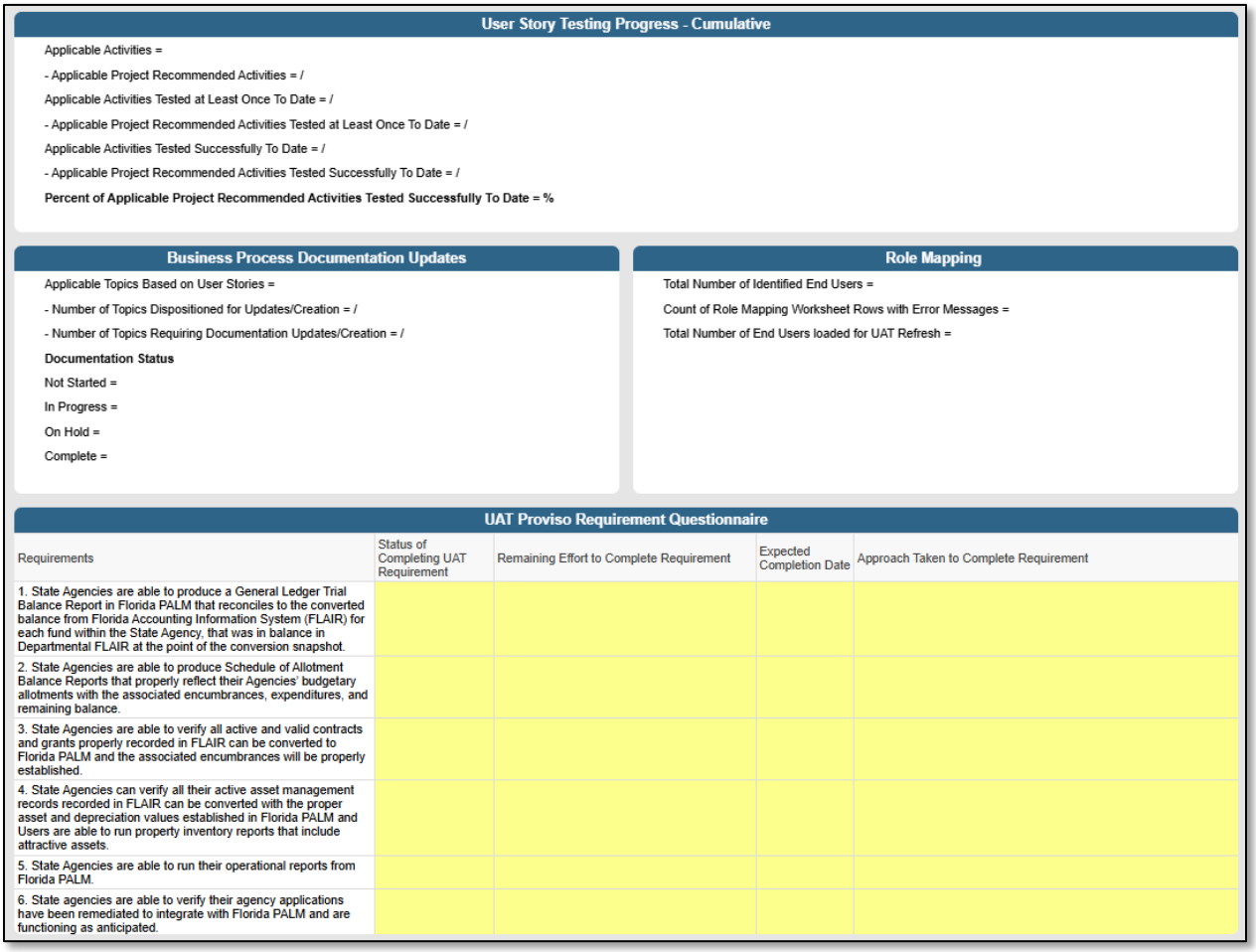


Figure 2: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 2)



User Story Testing Progress - Cumulative

Applicable Activities =

- Applicable Project Recommended Activities = /

Applicable Activities Tested at Least Once To Date = /

- Applicable Project Recommended Activities Tested at Least Once To Date = /

Applicable Activities Tested Successfully To Date = /

- Applicable Project Recommended Activities Tested Successfully To Date = /

Percent of Applicable Project Recommended Activities Tested Successfully To Date = %

Business Process Documentation Updates

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /

- Number of Topics Requiring Documentation Updates/Creation = /

Documentation Status

Not Started =

In Progress =

On Hold =

Complete =

Role Mapping

Total Number of Identified End Users =

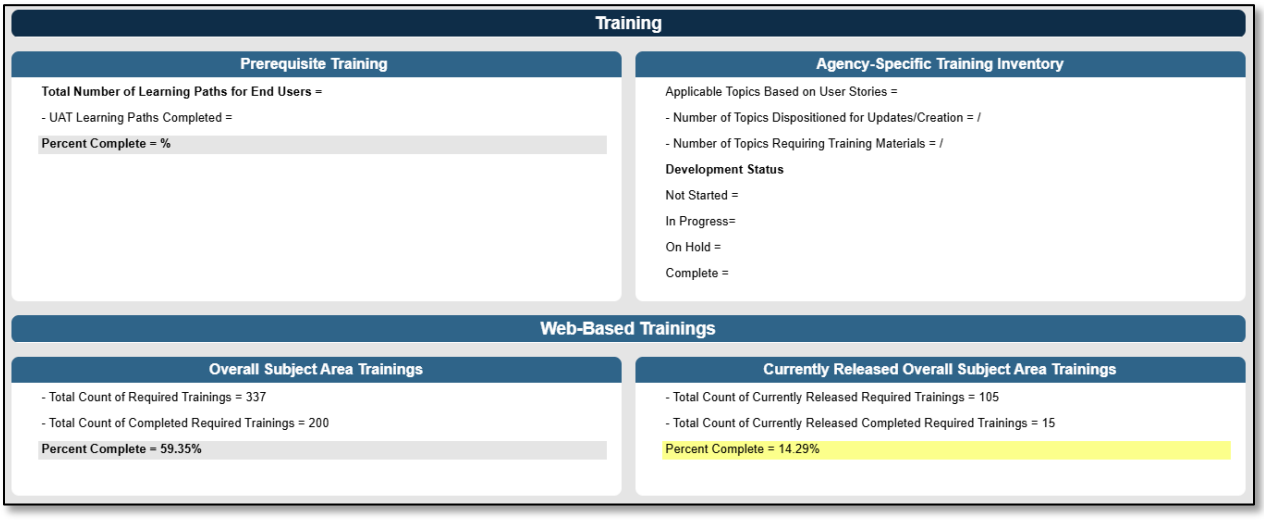
Count of Role Mapping Worksheet Rows with Error Messages =

Total Number of End Users loaded for UAT Refresh =

UAT Proviso Requirement Questionnaire

Requirements	Status of Completing UAT Requirement	Remaining Effort to Complete Requirement	Expected Completion Date	Approach Taken to Complete Requirement
1. State Agencies are able to produce a General Ledger Trial Balance Report in Florida PALM that reconciles to the converted balance from Florida Accounting Information System (FLAIR) for each fund within the State Agency, that was in balance in Departmental FLAIR at the point of the conversion snapshot.				
2. State Agencies are able to produce Schedule of Allotment Balance Reports that properly reflect their Agencies' budgetary allotments with the associated encumbrances, expenditures, and remaining balance.				
3. State Agencies are able to verify all active and valid contracts and grants properly recorded in FLAIR can be converted to Florida PALM and the associated encumbrances will be properly established.				
4. State Agencies can verify all their active asset management records recorded in FLAIR can be converted with the proper asset and depreciation values established in Florida PALM and Users are able to run property inventory reports that include attractive assets.				
5. State Agencies are able to run their operational reports from Florida PALM.				
6. State agencies are able to verify their agency applications have been remediated to integrate with Florida PALM and are functioning as anticipated.				

Figure 3: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 3)



Training

Prerequisite Training

Total Number of Learning Paths for End Users =

- UAT Learning Paths Completed =

Percent Complete = %

Agency-Specific Training Inventory

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /

- Number of Topics Requiring Training Materials = /

Development Status

Not Started =

In Progress=

On Hold =

Complete =

Web-Based Trainings

Overall Subject Area Trainings

- Total Count of Required Trainings = 337

- Total Count of Completed Required Trainings = 200

Percent Complete = 59.35%

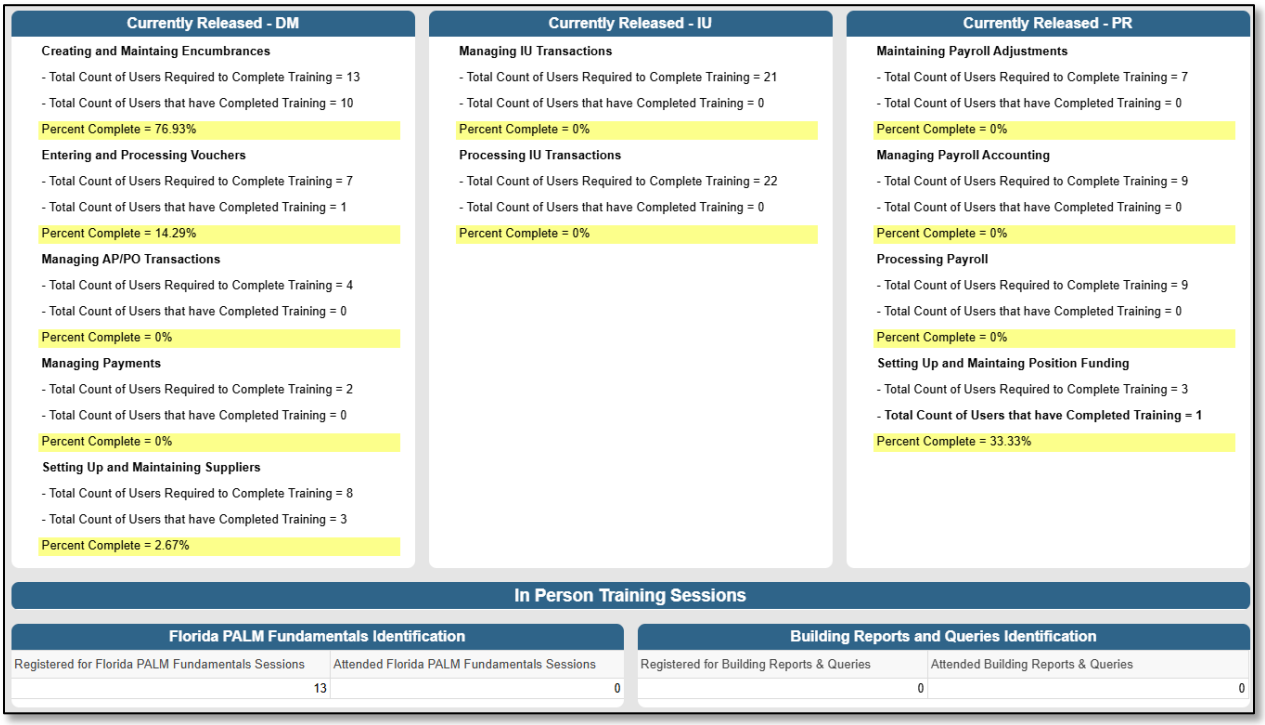
Currently Released Overall Subject Area Trainings

- Total Count of Currently Released Required Trainings = 105

- Total Count of Currently Released Completed Required Trainings = 15

Percent Complete = 14.29%

Figure 4: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 4)



Currently Released - DM

Creating and Maintaing Encumbrances
- Total Count of Users Required to Complete Training = 13
- Total Count of Users that have Completed Training = 10

Percent Complete = 76.93%

Entering and Processing Vouchers
- Total Count of Users Required to Complete Training = 7
- Total Count of Users that have Completed Training = 1

Percent Complete = 14.29%

Managing AP/PO Transactions
- Total Count of Users Required to Complete Training = 4
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Managing Payments
- Total Count of Users Required to Complete Training = 2
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Setting Up and Maintaining Suppliers
- Total Count of Users Required to Complete Training = 8
- Total Count of Users that have Completed Training = 3

Percent Complete = 2.67%

Currently Released - IU

Managing IU Transactions
- Total Count of Users Required to Complete Training = 21
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Processing IU Transactions
- Total Count of Users Required to Complete Training = 22
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Currently Released - PR

Maintaining Payroll Adjustments
- Total Count of Users Required to Complete Training = 7
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Managing Payroll Accounting
- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Processing Payroll
- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 0

Percent Complete = 0%

Setting Up and Maintaing Position Funding
- Total Count of Users Required to Complete Training = 3
- **Total Count of Users that have Completed Training = 1**

Percent Complete = 33.33%

In Person Training Sessions

Florida PALM Fundamentals Identification

Registered for Florida PALM Fundamentals Sessions	Attended Florida PALM Fundamentals Sessions
13	0

Building Reports and Queries Identification

Registered for Building Reports & Queries	Attended Building Reports & Queries
0	0

Figure 5: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 5)

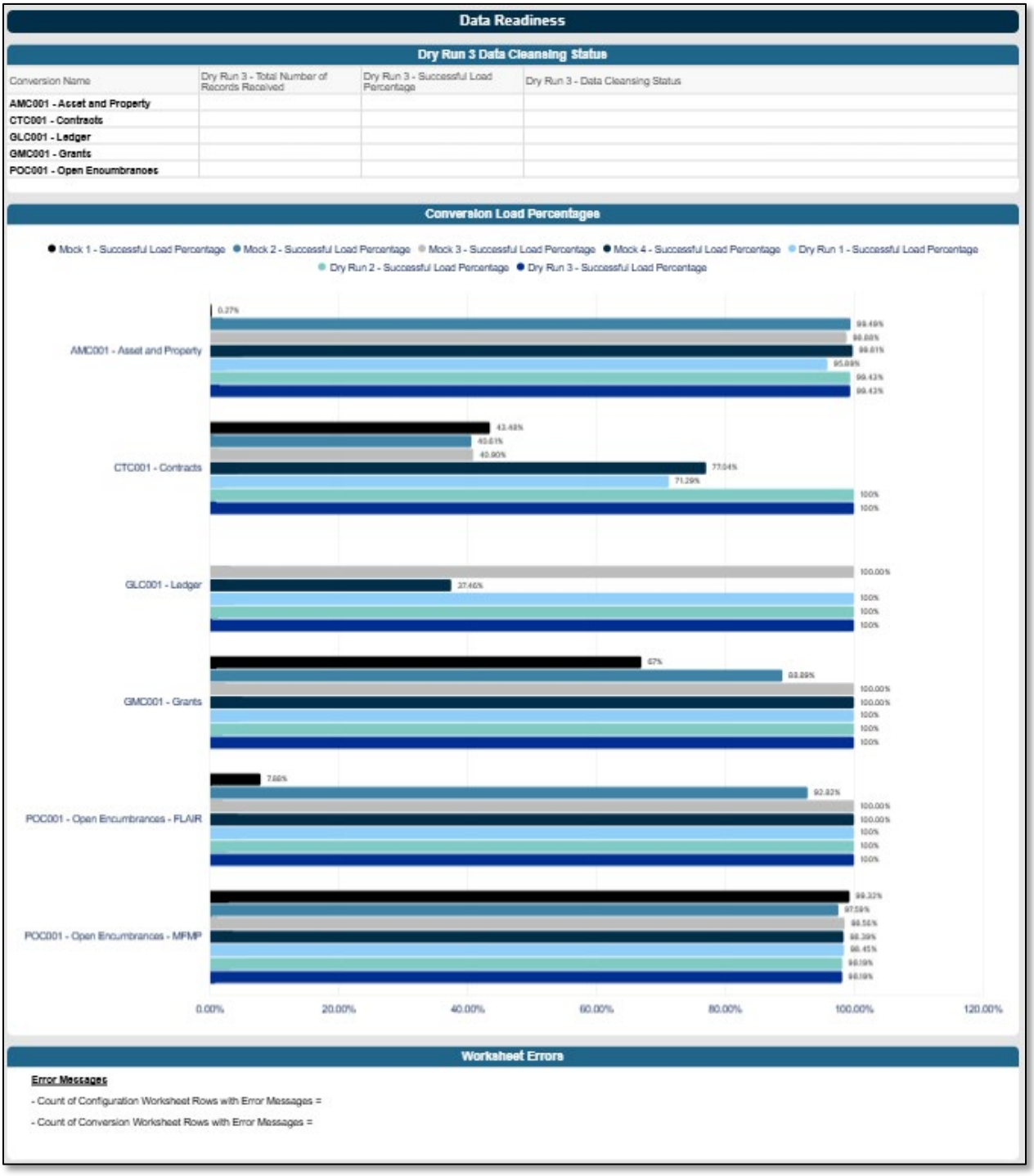
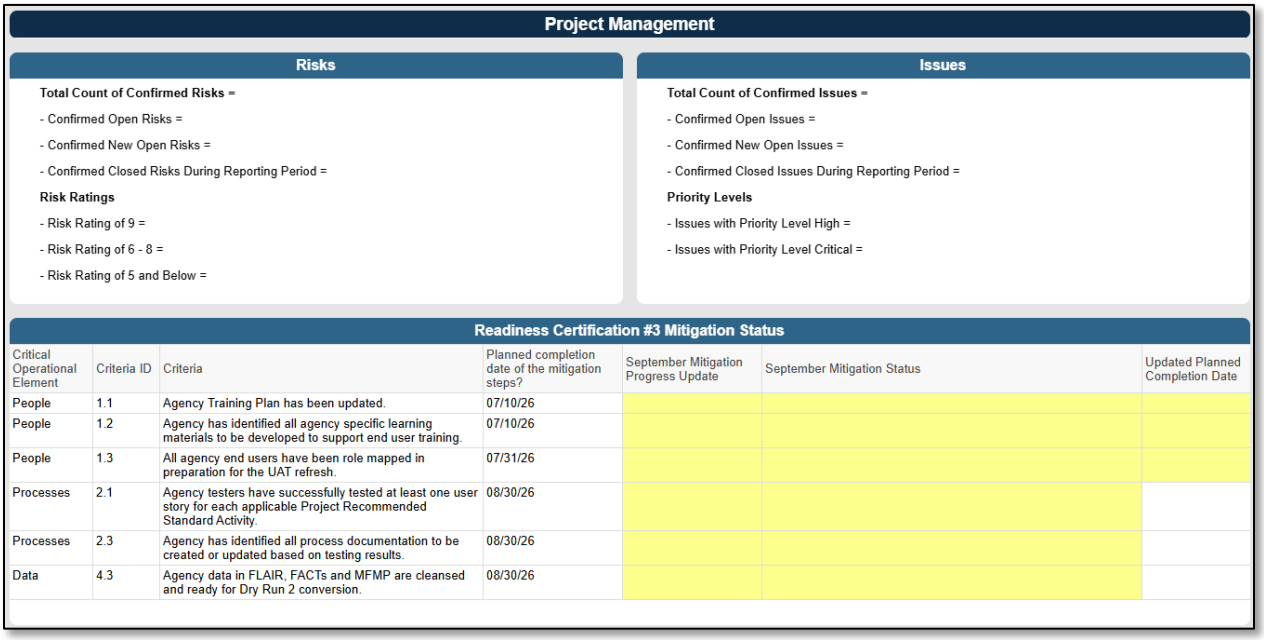


Figure 6: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 6)



Project Management

Risks

Total Count of Confirmed Risks =

- Confirmed Open Risks =
- Confirmed New Open Risks =
- Confirmed Closed Risks During Reporting Period =

Risk Ratings

- Risk Rating of 9 =
- Risk Rating of 6 - 8 =
- Risk Rating of 5 and Below =

Issues

Total Count of Confirmed Issues =

- Confirmed Open Issues =
- Confirmed New Open Issues =
- Confirmed Closed Issues During Reporting Period =

Priority Levels

- Issues with Priority Level High =
- Issues with Priority Level Critical =

Readiness Certification #3 Mitigation Status

Critical Operational Element	Criteria ID	Criteria	Planned completion date of the mitigation steps?	September Mitigation Progress Update	September Mitigation Status	Updated Planned Completion Date
People	1.1	Agency Training Plan has been updated.	07/10/26			
People	1.2	Agency has identified all agency specific learning materials to be developed to support end user training.	07/10/26			
People	1.3	All agency end users have been role mapped in preparation for the UAT refresh.	07/31/26			
Processes	2.1	Agency testers have successfully tested at least one user story for each applicable Project Recommended Standard Activity.	08/30/26			
Processes	2.3	Agency has identified all process documentation to be created or updated based on testing results.	08/30/26			
Data	4.3	Agency data in FLAIR, FACTs and MFMP are cleansed and ready for Dry Run 2 conversion.	08/30/26			

Figure 7: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 7)

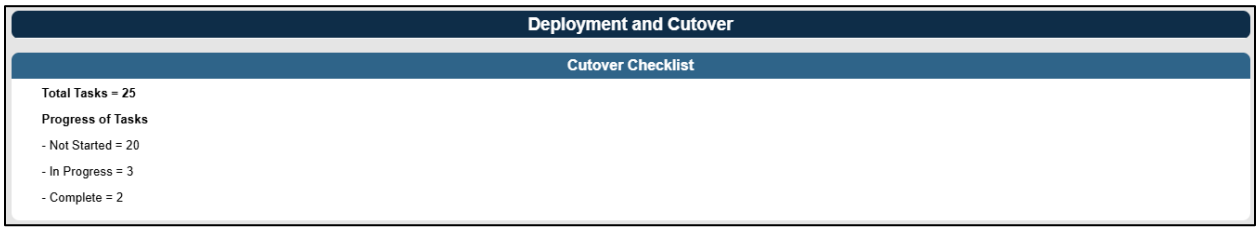


Figure 8: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 8)

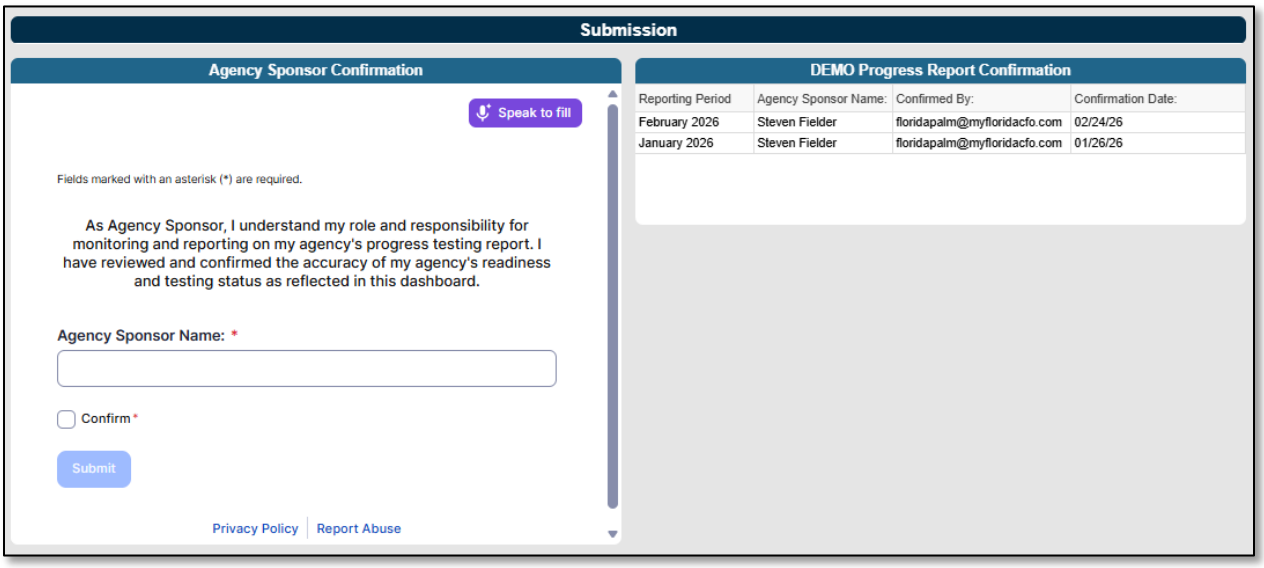


Figure 9: Demo Monthly Progress Report – Testing, Training, Cutover Dashboard (Panel 9)

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

Table 1: Smartsheet Resources for Monthly Status Report, Agency Applicability and Related Guidance

Smartsheet Resource	Agency Applicability	Related Task Instruction or Supplemental Documentation
<Agency> Interface Cycle 3 – Full Integration Testing worksheet	Required for all interfacing agencies	Cycle 3 Interface Full Integration Testing Supplemental
<Agency> User Story Activity Coverage worksheet	Required for all agencies	User Story Activity Coverage Supplemental
<Agency> User Story Inventory worksheet	Required only for agencies that have chosen to document user stories outside of the Change Analysis tool	User Story Inventory for Progress Reporting Supplemental
<Agency> Change Analysis worksheet	Required only for agencies that have chosen to document user stories outside of the User Story Inventory worksheet	Change Analysis Tool for Progress Reporting Supplemental
<Agency> Agency Business Process Documentation Inventory worksheet	Required for all agencies	RW Task 602 – Update Agency Business Process Documentation
<Agency> Role Mapping worksheet	Required for all agencies	Role Mapping Supplemental
<Agency> Prerequisite Tracking worksheet	Required for all agencies	UAT Online Prerequisite Training Tracker Supplemental
<Agency> Agency-Specific Training Inventory worksheet	Required for all agencies	RW Task 604 – Create Agency-Specific Learning Materials to Support End Users
<Agency> Mock Conversions worksheet	Required for all agencies	N/A - RW Task 705 – Complete Data Cleansing in Preparation for Dry Run 3
<Agency> Configuration and Conversion worksheets	Required for all agencies	Configuration and Conversion Supplementals located on the Agency Readiness webpage
<Agency> Risks worksheet	Required for all agencies	Risks and Issues Supplemental
<Agency> Issues worksheet	Required for all agencies	Risks and Issues Supplemental
<Agency> Readiness Mitigation #3 worksheet	Required only for agencies with outstanding Readiness Certification #3 criteria	Readiness Certification #3 Mitigation Supplemental

Smartsheet Resource	Agency Applicability	Related Task Instruction or Supplemental Documentation
<Agency> UAT Proviso Requirement Questionnaire worksheet	Required for all agencies	UAT Proviso Requirement Questionnaire Supplemental
<Agency> *Cutover Checklist* worksheet	Required for all agencies	Cutover Checklist Supplemental
<Agency> Training Completion Tracker worksheet	Required for all agencies	Training Completion Tracker Supplemental

Interface Cycle 3 – Full Integration Testing Section

The Interface Cycle 3 – Full Integration Testing (Figure 10) section is designed to help you track your agency end-to-end interface testing progress during All Agency UAT. The Cycle 3 Interface Testing progress is grouped by the direction of the interface (e.g., into Florida PALM, out of Florida PALM) and displays the progress reported for the month and cumulative testing progress since the start of UAT.

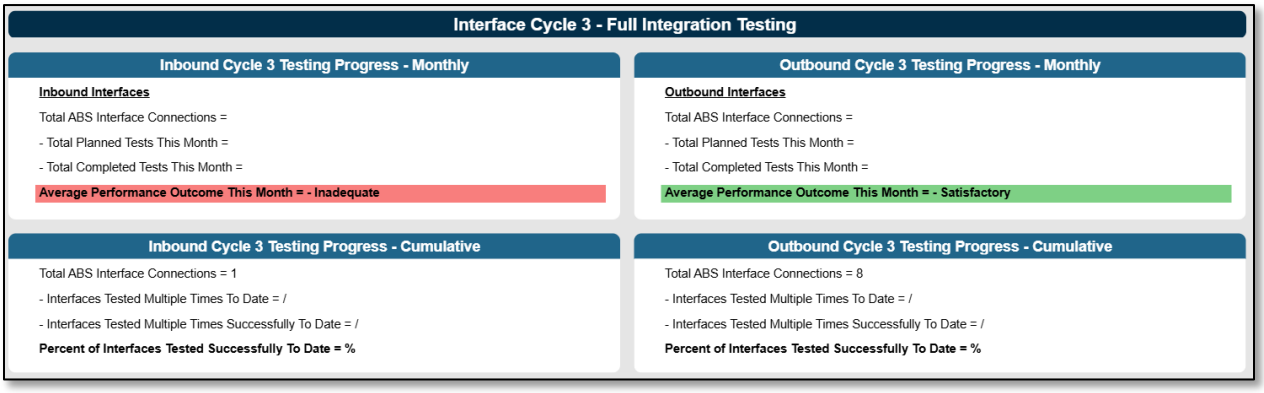


Figure 10: Interface Cycle 3 – Full Integration Testing

Interface Cycle 3 Testing Progress - Monthly

The Interface Cycle 3 Testing Progress – Monthly boxes (Figure 11) display a summary of your agency's interface testing progress for the reporting month, for both Inbound and Outbound interfaces. This data is maintained in your*<Agency> Cycle 3 – Full Integration Testing* worksheet.

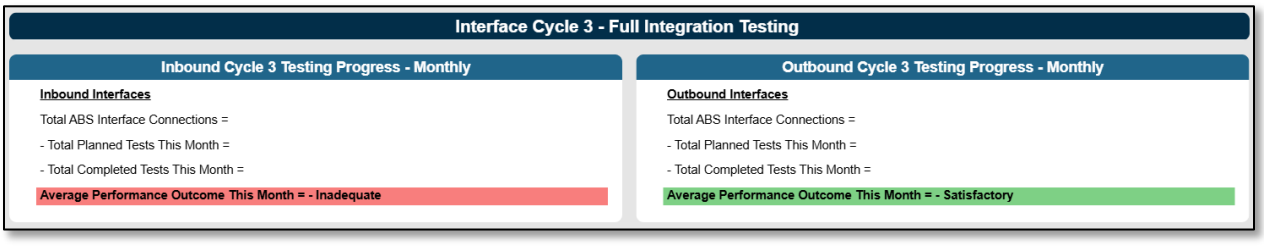


Figure 11: Inbound/Outbound Cycle 3 Testing Progress - Monthly

- *Total ABS Interface Connections* indicates a total count of all unique Agency Business System interface connections (e.g., an ABS can have multiple connections).
- *Total Planned Tests This Month* indicates the total count of all interface tests that your agency plans to conduct for the month.
- *Total Completed Tests This Month* indicates the total count of all interface tests completed during the month.
- *Average Performance Outcome This Month* averages all the values for the month in the Performance Outcome column to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. Refer to Table 2 for details.

Table 2: Average Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

**The Performance Outcome column is found in your <Agency> Cycle 3 – Full Interface Testing worksheet.*

Review the Cycle 3 – Full Interface Testing Supplemental to learn more on how to complete this section.

Interface Cycle 3 Testing Progress - Cumulative

The Cycle 3 Interface Testing Progress - Cumulative data (Figure 12) is populated with information submitted in your previous Monthly Progress Reports since the start of UAT, plus data from the current reporting period.

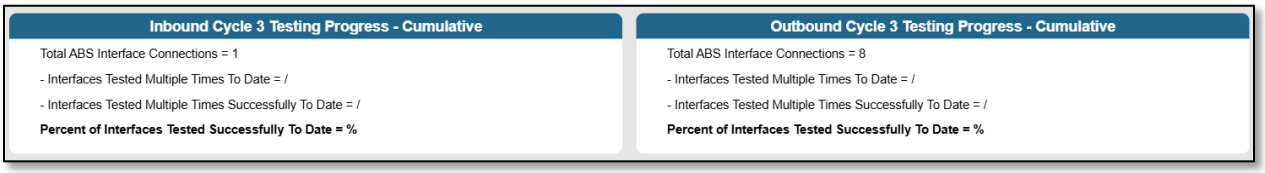


Figure 12: Inbound/Outbound Cycle 3 Testing Progress - Cumulative

- *Total ABS Interface Connections* indicates a total count of all unique Agency Business System interface connections (e.g., an ABS can have multiple connections).
- *Interfaces Tested Multiple Times* indicates the count of interfaces that have been tested more than once, as reported in your *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections.
- *Interfaces Tested Multiple Times Successfully* indicates the count of interfaces that have been successfully tested more than once (i.e., with at least two performance outcomes of 'Satisfactory' or 'Above Expectations') as reported in your *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections.
- *Percent of Interfaces Tested Successfully* indicates the percentage of interfaces that have been successfully tested more than once (i.e., with at least two performance outcomes of

'Satisfactory' or 'Above Expectations') as reported in *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections and assigns a color indicator. Refer to Table 3 for details.

Table 3: Color Indicators for Percent of Interfaces Tested Successfully

Percent of Interfaces Tested Successfully	Color Indicator
100.00%	Green
90 – 99.99%	Yellow
0 – 89.99%	Red

View your past progress reporting submission data and cumulative data in your *Florida PALM Archive for <Agency> workspace > Archive – Dashboard Data* worksheet.

UAT Execution Section

The UAT Execution (Figures 13, 14, and 15) section is designed to help you understand your agency's current UAT progress and status.

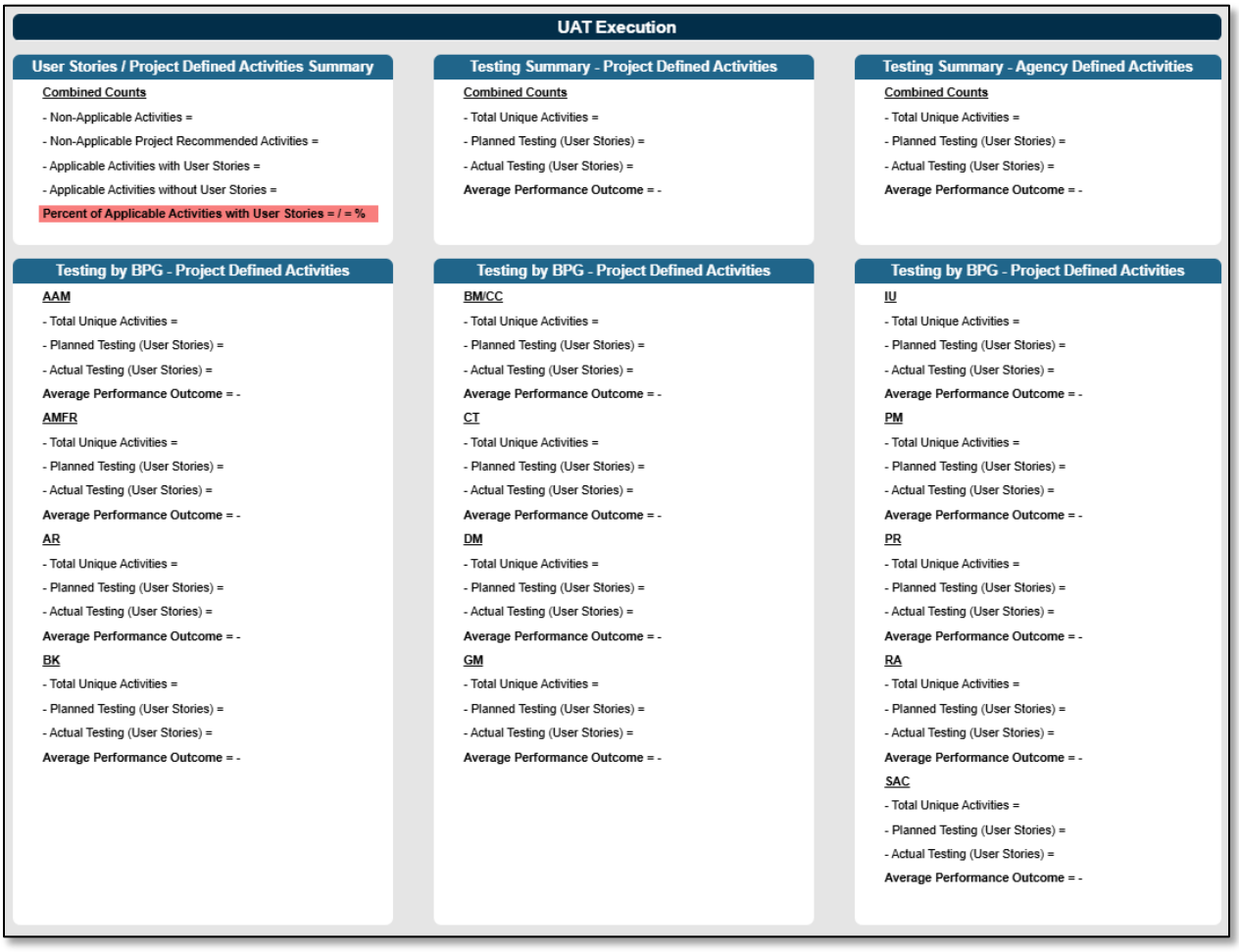
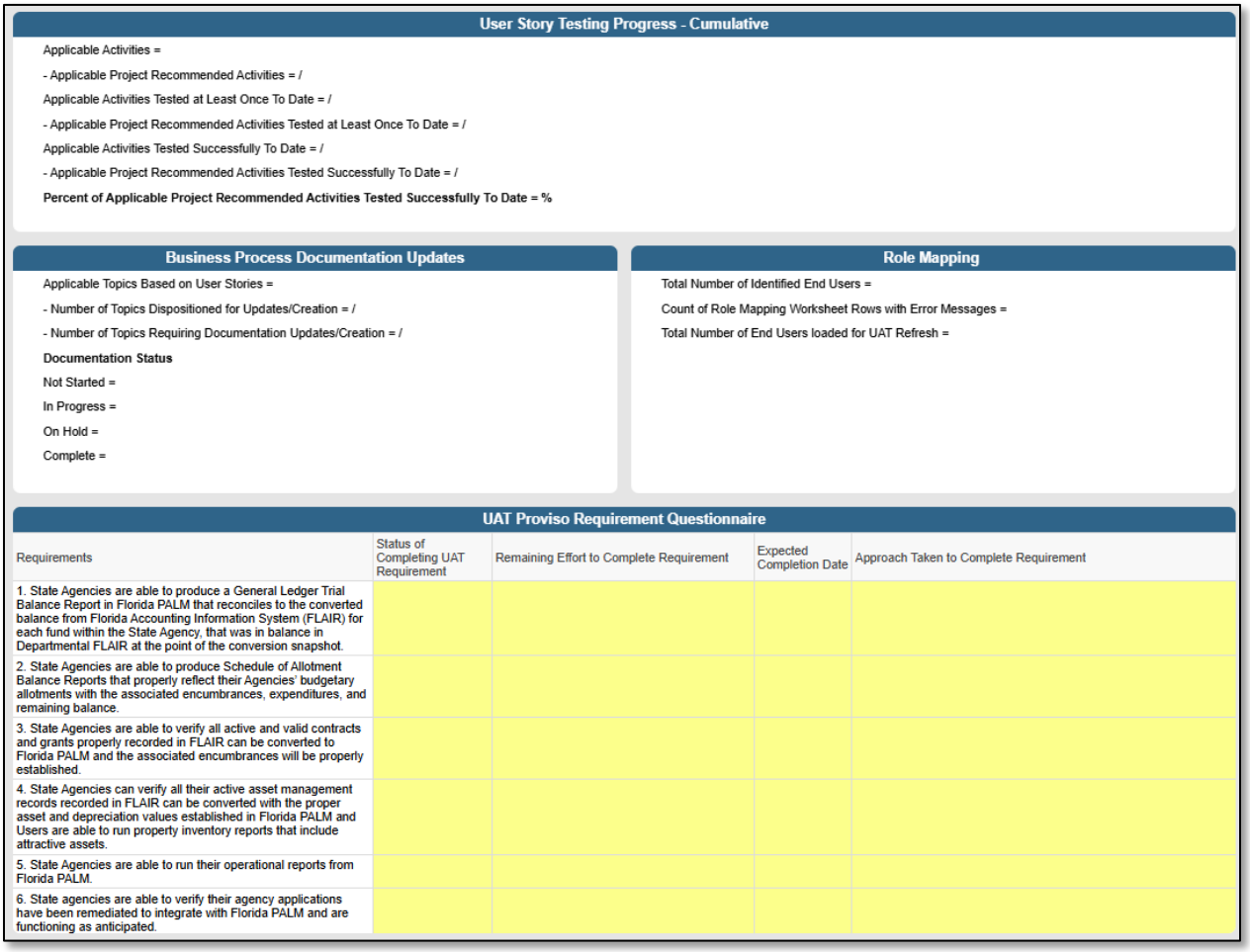


Figure 13: UAT Execution section



User Story Testing Progress - Cumulative

Applicable Activities =

- Applicable Project Recommended Activities = /

Applicable Activities Tested at Least Once To Date = /

- Applicable Project Recommended Activities Tested at Least Once To Date = /

Applicable Activities Tested Successfully To Date = /

- Applicable Project Recommended Activities Tested Successfully To Date = /

Percent of Applicable Project Recommended Activities Tested Successfully To Date = %

Business Process Documentation Updates

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /

- Number of Topics Requiring Documentation Updates/Creation = /

Documentation Status

Not Started =

In Progress =

On Hold =

Complete =

Role Mapping

Total Number of Identified End Users =

Count of Role Mapping Worksheet Rows with Error Messages =

Total Number of End Users loaded for UAT Refresh =

UAT Proviso Requirement Questionnaire

Requirements	Status of Completing UAT Requirement	Remaining Effort to Complete Requirement	Expected Completion Date	Approach Taken to Complete Requirement
1. State Agencies are able to produce a General Ledger Trial Balance Report in Florida PALM that reconciles to the converted balance from Florida Accounting Information System (FLAIR) for each fund within the State Agency, that was in balance in Departmental FLAIR at the point of the conversion snapshot.				
2. State Agencies are able to produce Schedule of Allotment Balance Reports that properly reflect their Agencies' budgetary allotments with the associated encumbrances, expenditures, and remaining balance.				
3. State Agencies are able to verify all active and valid contracts and grants properly recorded in FLAIR can be converted to Florida PALM and the associated encumbrances will be properly established.				
4. State Agencies can verify all their active asset management records recorded in FLAIR can be converted with the proper asset and depreciation values established in Florida PALM and Users are able to run property inventory reports that include attractive assets.				
5. State Agencies are able to run their operational reports from Florida PALM.				
6. State agencies are able to verify their agency applications have been remediated to integrate with Florida PALM and are functioning as anticipated.				

Figure 14: UAT Execution section (Panel 2)

User Stories / Project Defined Activities Summary

This section (Figure 15) is intended to show how many project-defined activities are applicable for your agency and the number of applicable activities that agency plans to test based on the development of at least one user story.

The User Stories / Project Defined Activities Summary (Figure 16) section includes the following:

- *Non-Applicable Activities* indicates the count of all unique activities your agency will not perform (i.e., activity is marked as not applicable).
- *Non-Applicable Project Recommended Activities* indicates the count of the Project Recommended Standard activities your agency will not perform (i.e., activity is marked as not applicable).
- *Applicable Activities with User Stories* indicates the count of unique activities that your agency will perform (i.e., activity is not marked as not applicable) with at least one user story.
- *Applicable Activities without User Stories* indicates the count of unique activities your agency will perform (i.e., activity is not marked as not applicable) that do not have any user stories.

- *Percent of Applicable Activities with User Stories* indicates the percentage of agency applicable activities that have user stories and assigns a color indicator. Refer to Table 4 for details.

This data is being pulled from your *<Agency> User Story Activity Coverage* worksheet and includes only activities that are Project-defined, not agency defined.

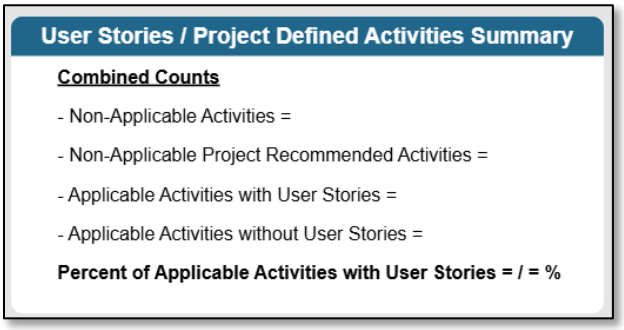


Figure 15: User Story Activity Summary

Table 4: Color Indicators for Percentage of Activities with User Stories

Percent of Activities with User Stories	Color Indicator
95 – 100.00%	Green
75 – 94.99%	Yellow
0.00 – 74.99%	Red

Review the User Story Activity Coverage Supplemental to learn more on how to complete this section.

Testing Summary – Project Defined Activities

The Testing Summary – Project Defined Activities (Figure 16) section displays an overall combined count of all unique project defined activities, planned and actual testing that occurred, and the average performance outcome for the month maintained in either your *<Agency> Change Analysis* worksheets or *<Agency> User Story Inventory* worksheet, depending on your agency's User Story Inventory option selection.

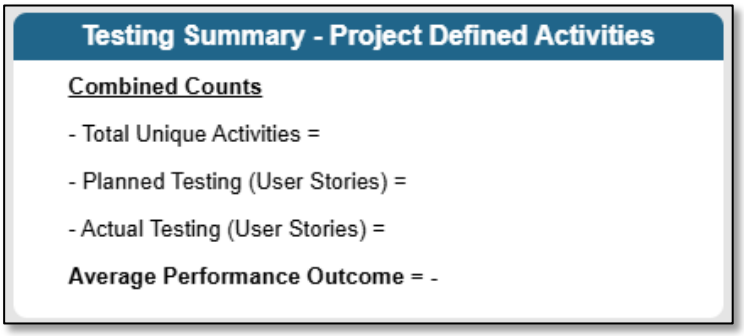


Figure 16: Overall UAT Testing Progress Report

- *Total Unique Activities* indicates the total count of all unique activities across BPGs.
- *Planned Testing (User Stories)* indicates the total count of all planned tests for the month across all BPGs.
- *Actual Testing (User Stories)* indicates the total count of all tests that occurred during the month across all BPGs.
- *Average Performance Outcome* shows an overall score that averages all the values of the Performance Outcome column selections, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 5 for details.

Table 5: UAT Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

**The Performance Outcome column is found in either your <Agency> Change Analysis worksheets or your <Agency> User Story Inventory worksheet, depending on your agency's User Story Inventory option selection.*

Review either the User Story Inventory for Progress Reporting Supplemental or the Change Analysis Tool for Progress Reporting Supplemental to learn more on how to complete this section.

Testing Summary – Agency Defined Activities

Testing Summary – Agency Defined Activities (Figure 17) section includes information on agencies' optionally identified activities and is used to track test scenarios that do not align with an activity on the Florida PALM Topics and Activities list. These values are only included in the Agency Defined portion of the dashboard and are not included in the combined counts for BPGs.

This section displays a total count of all Agency Defined unique activities, planned and actual testing that occurred, and the average performance outcome for the month, maintained in either your *<Agency> Change Analysis* worksheets or *<Agency> User Story Inventory* worksheet depending on your agency's User Story Inventory option selection.

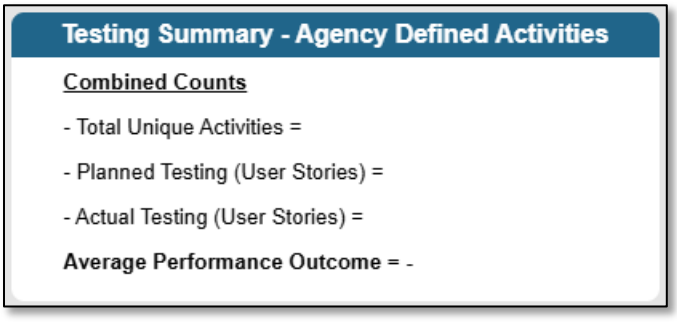


Figure 17: Agency Defined Testing Progress Report

- *Total Unique Activities* indicates the total count of all unique, agency-defined activities.
- *Planned Testing (User Stories)* indicates the total count of planned tests of all agency-defined activities for the month.

- *Actual Testing (User Stories)* indicates the total count of completed tests of agency-defined activities for the month.
- *Average Performance Outcome* averages all the values of the Performance Outcome column selections to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 6 for details.

Table 6: Agency Defined Average Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

**The Performance Outcome column is found in either your <Agency> Change Analysis worksheets or your <Agency> User Story Inventory worksheet, depending on your agency's User Story Inventory option selection.*

Review either the User Story Inventory for Progress Reporting Supplemental or the Change Analysis Tool for Progress Reporting Supplemental.

Testing by BPG – Project Defined Activities

The Testing by BPG – Project Defined Activities (Figure 18) section displays total counts of unique project defined activities, planned and actual testing that occurred, and the average performance outcome for the month for each BPG, maintained in either your *<Agency> Change Analysis* worksheets or *<Agency> User Story Inventory* worksheet depending on your agency's User Story Inventory option selection.

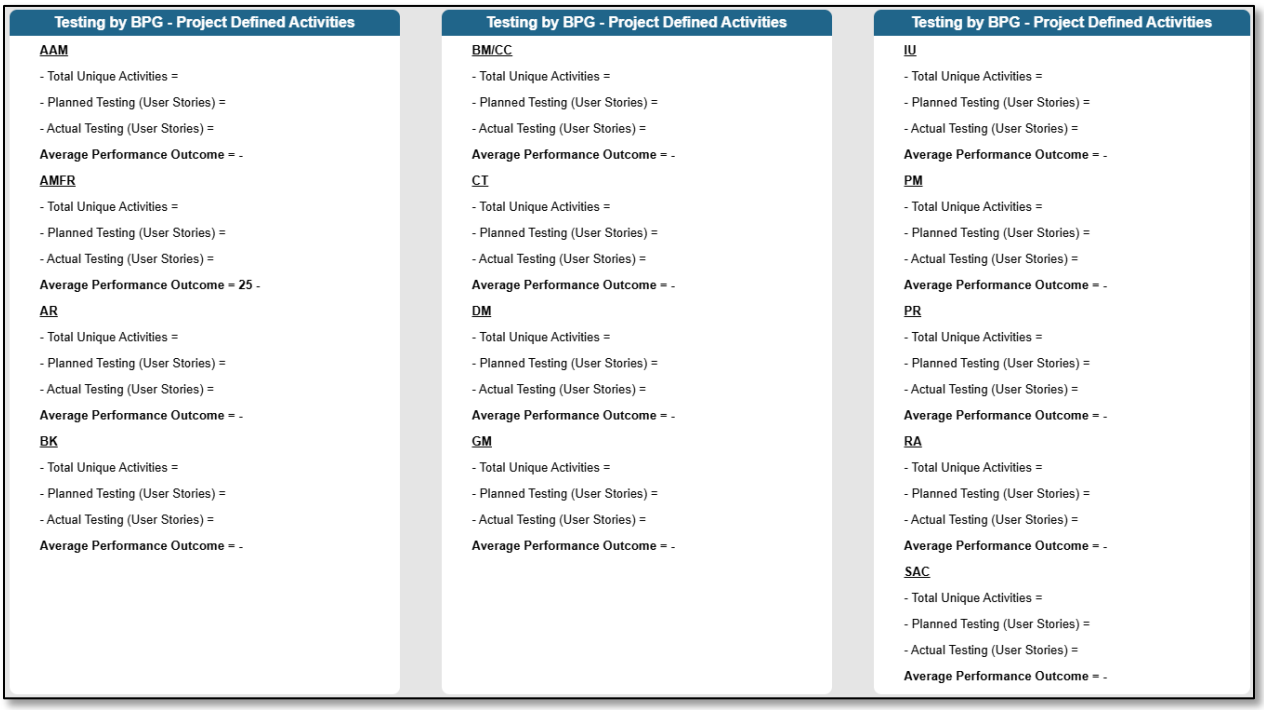


Figure 18: Testing by BPG – Project Defined Activities

- *Total Unique Activities* indicates the total count of all unique activities, per BPG.
- *Planned Testing (User Stories)* indicates the total count of all planned tests for the month, per BPG.
- *Actual Testing (User Stories)* indicates the total count of all tests that occurred during the month, per BPG.
- *Average Performance Outcome* averages all the values of the Performance Outcome column selections to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 7 for details.

Table 7: Average Performance Outcome Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

**The Performance Outcome column is found in either your <Agency> Change Analysis worksheets or your <Agency> User Story Inventory worksheet, depending on your agency's User Story Inventory option selection.*

Review either the User Story Supplemental or the Change Analysis Supplemental to learn more on how to complete this section.

User Story Testing Progress - Cumulative

The User Story Testing Progress - Cumulative (Figure 19) provides a summary of your agency's User Story Testing efforts since the start of UAT.

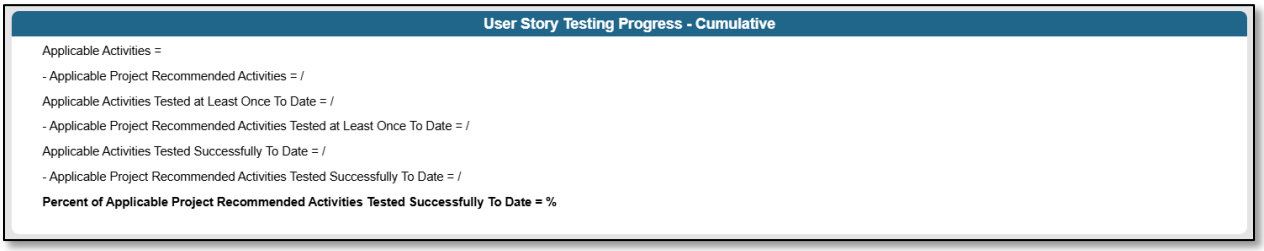


Figure 19: User Story Testing Progress - Cumulative

- *Applicable Activities* indicates the total number of applicable activities (i.e., activity is not marked as not applicable) for your agency.
- *Applicable Project Recommended Activities* indicates the number of project recommended standard activities over the total number of applicable activities.
- *Applicable Activities Tested at Least Once To Date* indicates how many applicable activities have been tested at least once to date, based on current and previous progress reporting since the start of UAT.
- *Applicable Project Recommended Activities Tested at Least Once To Date* indicates how many applicable project recommended activities have been tested at least once to date, based on current and previous progress reporting since the start of UAT.

- *Applicable Activities Tested Successfully To Date* indicates how many applicable activities have been tested successfully (i.e., with at least one performance outcome of 'Satisfactory' or 'Above Expectations') to date, based on current and previous progress reporting since the start of UAT.
- *Applicable Project Recommended Activities Tested Successfully to Date* indicates how many applicable project recommended activities have been tested successfully (i.e., with at least one performance outcome of 'Satisfactory' or 'Above Expectations') to date, based on current and previous progress reporting since the start of UAT.
- *Percent of Applicable Project Recommended Activities Tested Successfully To Date* displays the percent of applicable project recommended activities tested successfully to date, and assigns a color indicator. Refer to Table 8 for details.

This data is being pulled from either your *<Agency> Change Analysis* worksheets or *<Agency> User Story Inventory* worksheet, depending on your agency's User Story Inventory option selection, and based is based on selections made in your *<Agency> User Story Activity Coverage* worksheet. Only activities that are Project-defined, not agency defined, are included.

Table 8: Color Indicators for Percent of Applicable Project Recommended Activities Tested Successfully To Date

Percent of Applicable Project Recommended Activities Testes Successfully To Date	Color Indicator
100.00%	Green
90 – 99.99%	Yellow
0.00 – 89.99%	Red

View your past progress reporting submission data and cumulative data in your *Florida PALM Archive for <Agency> workspace > Archive – Dashboard Data worksheet.*

Business Process Documentation Updates

The Business Process Documentation Updates (Figure 20) section summarizes your reported progress related to updating or creating your agency business process documentation for Florida PALM. The data is pulled from your *<Agency> Business Process Documentation Inventory* worksheet.

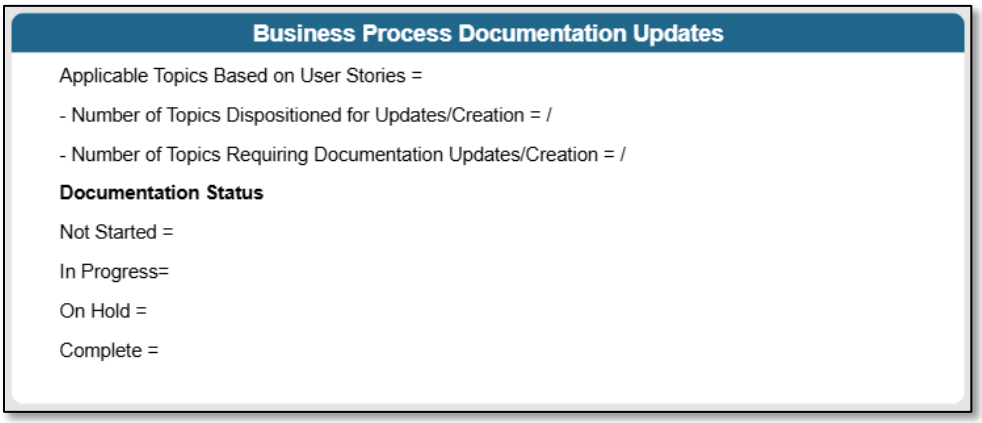


Figure 20: Business Process Documentation Updates

- *Applicable Topics Based on User Stories* indicates the number of applicable topics for your agency.
- *Number of Topics Dispositioned for Updates/Creation* indicates the number of topics dispositioned for documentation updates or creation out of the total applicable topics based on user stories.
- *Number of Topics Requiring Documentation Updates/Creation* indicates the number of topics that require business process documentation to be updated or created out of the total applicable topics.
- *Not Started* indicates the total number of Topics requiring business process documentation updates or creation with a documentation status of "'Not Started". Blanks will count as "Not Started" until indicated otherwise.
- *In Progress* indicates the total number of Topics requiring business process documentation updates or creation with a documentation status of "'In Progress".
- *On Hold* indicates the total number of Topics requiring business process documentation updates or creation with a documentation status of "'On Hold".
- *Complete* indicates the total number of Topics requiring business process documentation updates or creation with a documentation status of "'Complete".

Review RW602 Task Instructions - Update Agency Business Process Documentation for instructions on completing the worksheet.

Role Mapping

The Role Mapping (Figure 21) section displays a summary of your end user role mapping. The data is pulled from your *<Agency> Role Mapping* worksheet.

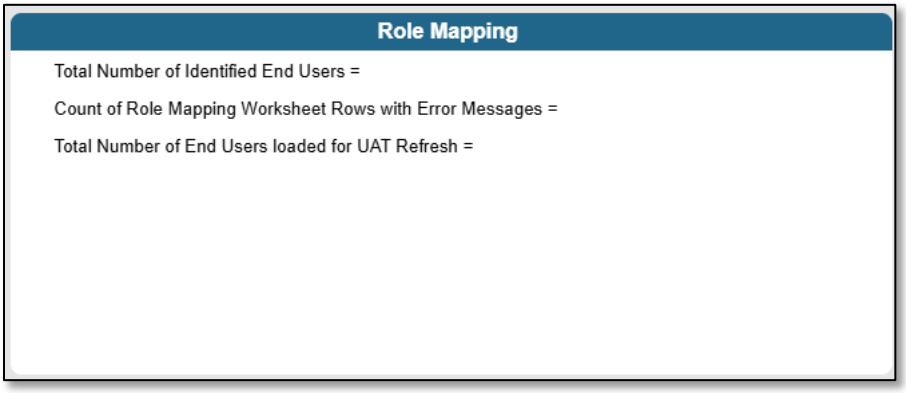


Figure 21: Role Mapping

- *Total Number of Identified End Users* indicates the complete count of end users that your agency has listed.
- *Count of Role Mapping Worksheet Rows with Error Messages* indicates the complete count of rows with error messages found in your Role Mapping worksheet.
- *Total Number of End Users loaded for UAT Refresh* indicated the complete count of end users that were successfully (no errors, etc.) loaded during UAT refresh

Review the Role Mapping Supplemental to learn more on how to complete this section.

UAT Proviso Requirement Questionnaire

The UAT Proviso Requirement Questionnaire (Figure 22) report displays your agency's answers that were provided in your *<Agency> UAT Proviso Requirement Questionnaire* worksheet.

UAT Proviso Requirement Questionnaire

Requirements	Status of Completing UAT Requirement	Remaining Effort to Complete Requirement	Expected Completion Date	Approach Taken to Complete Requirement
1. State Agencies are able to produce a General Ledger Trial Balance Report in Florida PALM that reconciles to the converted balance from Florida Accounting Information System (FLAIR) for each fund within the State Agency, that was in balance in Departmental FLAIR at the point of the conversion snapshot.				
2. State Agencies are able to produce Schedule of Allotment Balance Reports that properly reflect their Agencies' budgetary allotments with the associated encumbrances, expenditures, and remaining balance.				
3. State Agencies are able to verify all active and valid contracts and grants properly recorded in FLAIR can be converted to Florida PALM and the associated encumbrances will be properly established.				
4. State Agencies can verify all their active asset management records recorded in FLAIR can be converted with the proper asset and depreciation values established in Florida PALM and Users are able to run property inventory reports that include attractive assets.				
5. State Agencies are able to run their operational reports from Florida PALM.				
6. State agencies are able to verify their agency applications have been remediated to integrate with Florida PALM and are functioning as anticipated.				

Figure 22: UAT Proviso Requirement Questionnaire

Review the UAT Proviso Requirement Questionnaire Supplemental to learn more on how to complete this section.

Training Section

The Training (Figures 23 and 24) section provides the opportunity to share information related to your agency's training preparation and related activities.

Training

Prerequisite Training

Total Number of Learning Paths for End Users =

- UAT Learning Paths Completed =

Percent Complete = %

Agency-Specific Training Inventory

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /
- Number of Topics Requiring Training Materials = /

Development Status

Not Started =

In Progress=

On Hold =

Complete =

Web-Based Trainings

Overall Subject Area Trainings

- Total Count of Required Trainings = 337
- Total Count of Completed Required Trainings = 200

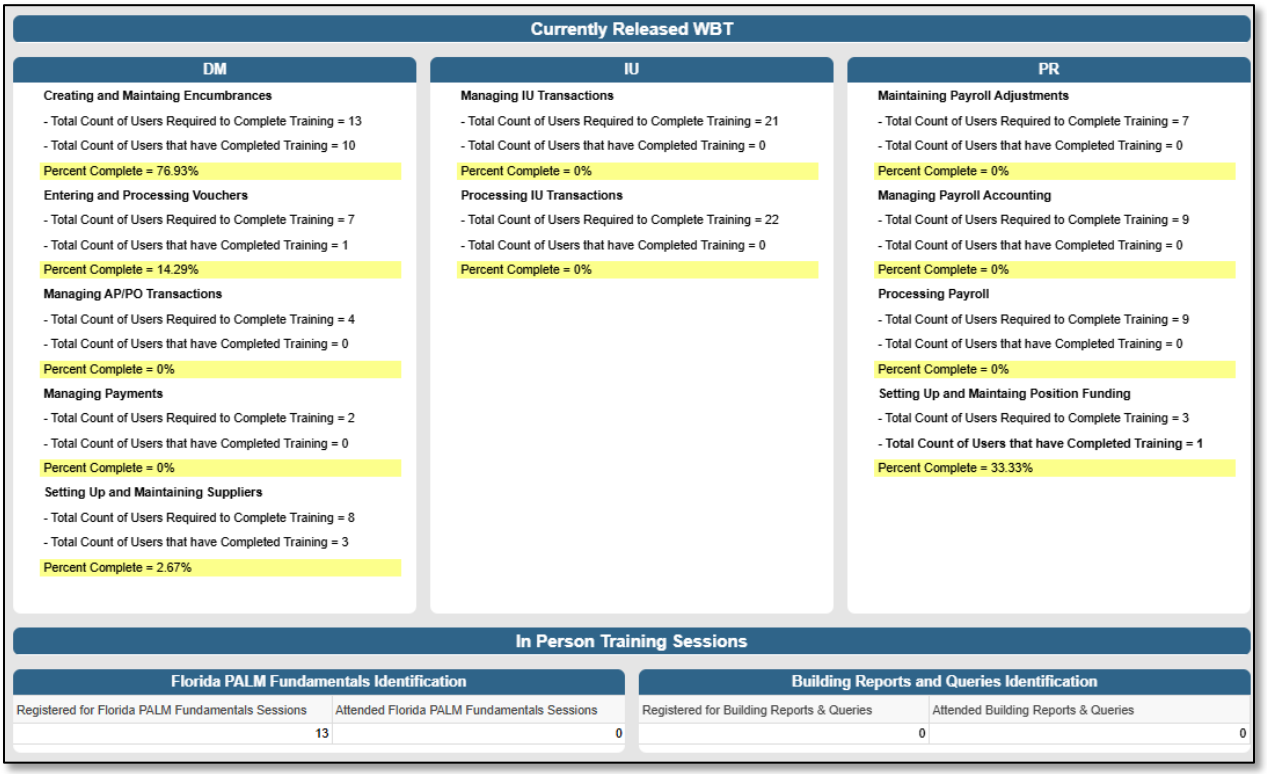
Percent Complete = 59.35%

Currently Released Overall Subject Area Trainings

- Total Count of Currently Released Required Trainings = 105
- Total Count of Currently Released Completed Required Trainings = 15

Percent Complete = 14.29%

Figure 23: Training (Panel 1)



Currently Released WBT

DM	IU	PR
Creating and Maintaing Encumbrances	**Managing IU Transactions**	**Maintaining Payroll Adjustments**
- Total Count of Users Required to Complete Training = 13	- Total Count of Users Required to Complete Training = 21	- Total Count of Users Required to Complete Training = 7
- Total Count of Users that have Completed Training = 10	- Total Count of Users that have Completed Training = 0	- Total Count of Users that have Completed Training = 0
Percent Complete = 76.93%	Percent Complete = 0%	Percent Complete = 0%
Entering and Processing Vouchers	**Processing IU Transactions**	**Managing Payroll Accounting**
- Total Count of Users Required to Complete Training = 7	- Total Count of Users Required to Complete Training = 22	- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 1	- Total Count of Users that have Completed Training = 0	- Total Count of Users that have Completed Training = 0
Percent Complete = 14.29%	Percent Complete = 0%	Percent Complete = 0%
Managing AP/PO Transactions		**Processing Payroll**
- Total Count of Users Required to Complete Training = 4		- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 0		- Total Count of Users that have Completed Training = 0
Percent Complete = 0%		Percent Complete = 0%
Managing Payments		**Setting Up and Maintaing Position Funding**
- Total Count of Users Required to Complete Training = 2		- Total Count of Users Required to Complete Training = 3
- Total Count of Users that have Completed Training = 0		- Total Count of Users that have Completed Training = 1
Percent Complete = 0%		Percent Complete = 33.33%
Setting Up and Maintaining Suppliers		
- Total Count of Users Required to Complete Training = 8		
- Total Count of Users that have Completed Training = 3		
Percent Complete = 2.67%		

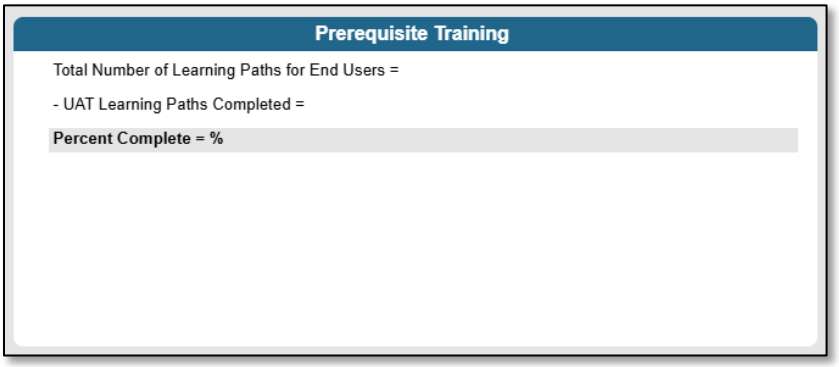
In Person Training Sessions

Florida PALM Fundamentals Identification		Building Reports and Queries Identification	
Registered for Florida PALM Fundamentals Sessions	Attended Florida PALM Fundamentals Sessions	Registered for Building Reports & Queries	Attended Building Reports & Queries
13	0	0	0

Figure 24: Training (Panel 2)

Prerequisite Training

The Prerequisite Training (Figure 25) section displays the total number of required UAT prerequisite learning paths for your end users and the number of UAT prerequisite learning paths that your end users have completed, as maintained in your *<Agency> Prerequisite Tracking* worksheet.



Prerequisite Training

Total Number of Learning Paths for End Users =

- UAT Learning Paths Completed =

Percent Complete = %

Figure 25: Prerequisite Training

- *Total Number of Learning Paths for End Users* indicates the total count of prerequisite learning paths for end users based on their role assignment in your *<Agency> Role Mapping* worksheet.

- *UAT Learning Paths Completed* indicates the total completed UAT prerequisite learning paths for all end users based on their role assignment, as reported in your *<Agency> Prerequisite Tracking* worksheet.
- *Percent Complete* indicates the percent of end users that have completed all identified prerequisite training over the total number of end users.

Review the UAT Online Prerequisite Training Tracker Supplemental to learn more on how to complete this section.

Agency-Specific Training Inventory

The Agency-Specific Training Inventory (Figure 26) section summarizes your reported progress related to creating your agency-specific training for Florida PALM. The data is pulled from your *<Agency> Agency-Specific Training Inventory* worksheet.

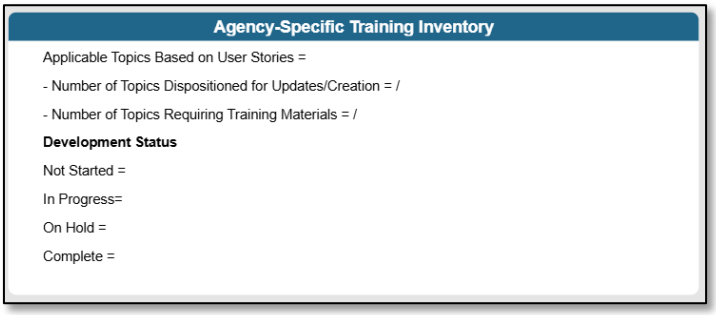


Figure 26: Agency-Specific Training Inventory

- *Applicable Topics Based on User Stories* indicates the number of applicable topics your agency has based on reported user stories.
- *Number of Topics Dispositioned for Updates/Creation* indicates the number of topics dispositioned for updates or creation out of the total applicable topics based on reported user stories.
- *Number of Topics Requiring Training Materials* indicates the number of topics that require documentation updates or creation out of the total applicable topics based on user stories.
- *Not Started* indicates the total number of Topics requiring training material development status of "'Not Started". Blanks will count as "Not Started" until indicated otherwise.
- *In Progress* indicates the total number of Topics requiring training material development status of "'In Progress".
- *On Hold* indicates the total number of Topics requiring training material development status of "'On Hold".
- *Complete* indicates the total number of Topics training material development status of "'Complete".

Review RW604 Task Instructions - Create Agency-Specific Learning Materials to Support End Users for instructions on completing the worksheet.

Overall Subject Area Trainings

The Overall Subject Area Trainings (Figure 27) section displays the overall total number of required web-based trainings (WBTs) for your end users and the number of required WBTs that

your end users have completed, as reported in your *<Agency> Training Completion Tracker* worksheet.

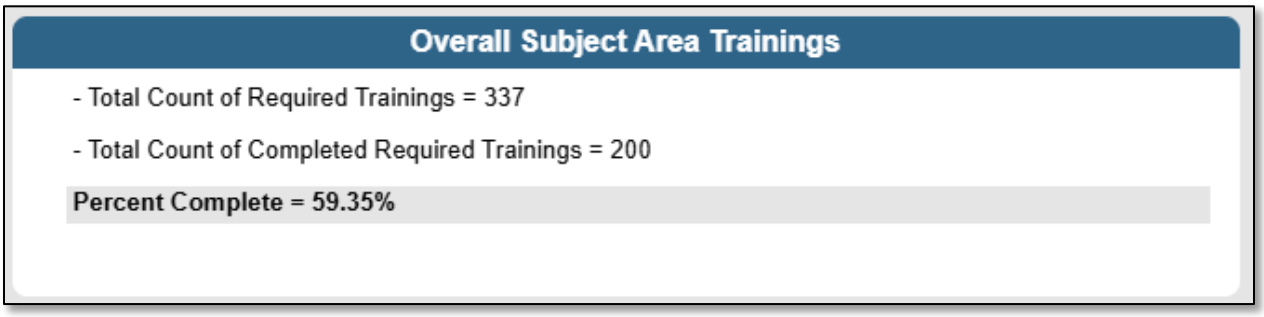


Figure 27: Overall Subject Area Trainings

- *Total Count of Required Trainings* indicates the total count of required WBTs based on the number of end users and the number of Subject Areas they have assigned roles within, as indicated in your *<Agency> Training Completion Tracker* worksheet.
- *Total Count of Completed Required Trainings* indicates the total required WBTs that have been reported as completed by those that are required to complete, per your *<Agency> Training Completion Tracker* worksheet.
    - This does **not** count WBTs that are reported as complete but are not required based on role assignment.
- *Percent Complete* indicates the percent of required WBTs reported as complete in your *<Agency> Training Completion Tracker* worksheet (Total Count of Completed Required Trainings / Total Count of Required Trainings).

Review the Training Completion Tracker supplemental to learn more on how to complete this section.

Currently Released Overall Subject Area Trainings

The Currently Released Overall Subject Area Trainings (Figure 28) section displays data for the WBTs that have been released and are planned to be released for the month, including the total required currently released WBTs for your end users and the number of required currently released WBTs that your end users have completed, as reported in your *<Agency> Training Completion Tracker* worksheet.

The WBT Release Schedule report provides the planned and actual release dates for all WBTs.

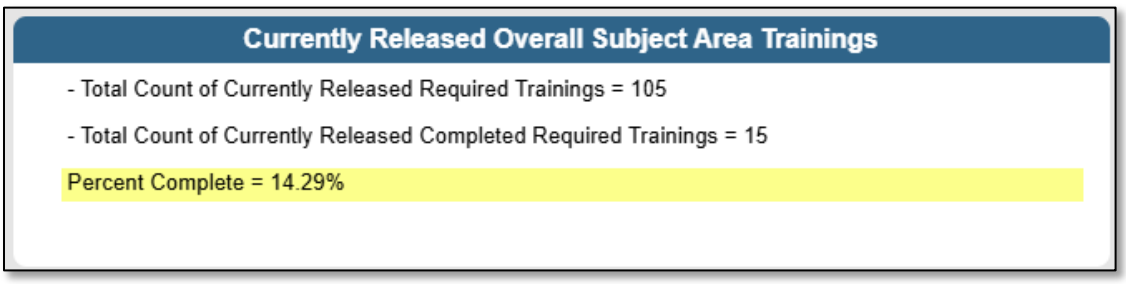


Figure 28: Currently Released Overall Subject Area Trainings

- *Total Count of Currently Released Required Trainings* indicates the total count of currently released required WBTs based on the number of end users' and the number of Subject Areas they have assigned roles within, as indicated in your *<Agency> Training Completion Tracker* worksheet.
- *Total Count of Currently Released Completed Required Trainings* indicates the total currently released required WBTs that have been reported as completed by those that are required to complete, per your *<Agency> Training Completion Tracker* worksheet.
    - This does **not** count WBTs that are reported as complete but are not required based on role assignment.
- *Percent Complete* indicates the percent of required currently released WBTs reported as complete in your *<Agency> Training Completion Tracker* worksheet (Total Count of Currently Released Completed Required Trainings / Total Count of Currently Released Required Trainings).

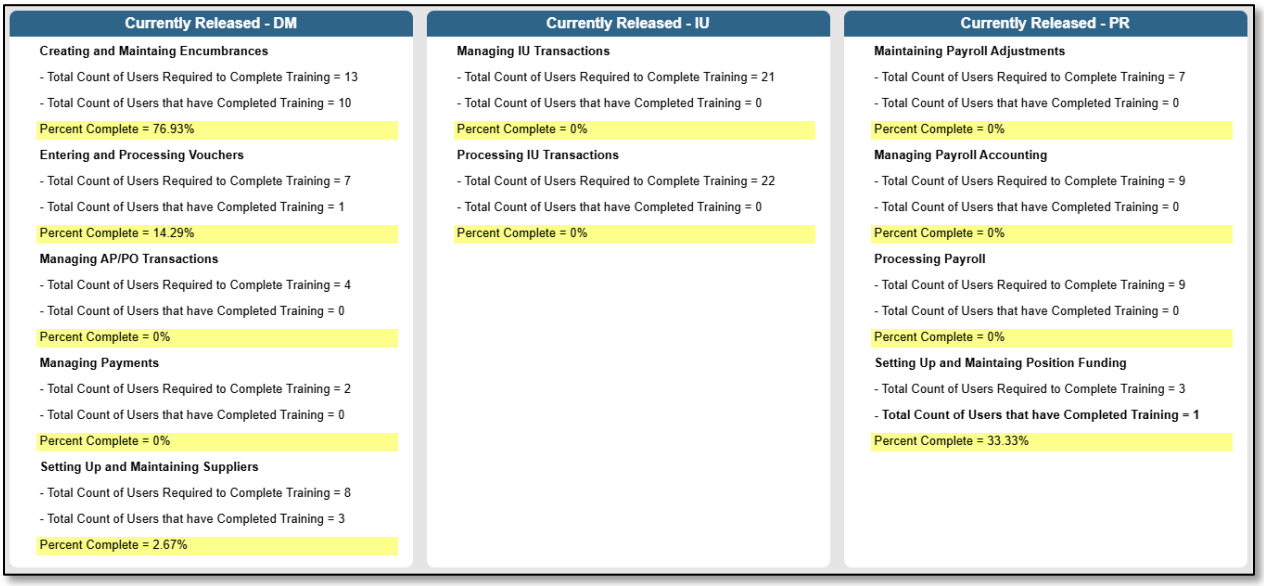
NOTE: *This will appear in your Readiness Certification #4 Dashboard. A 25% or higher percent complete is required for Criteria 1.1.*

NOTE*: If percent complete is less than 25.00%, the row will be yellow. If percent complete is 25.00% or greater, the row will be green.*

Review the Training Completion Tracker Supplemental to learn more on how to complete this section.

Currently Released (by Business Process Grouping)

The Currently Released (by Business Process Grouping) (Figure 29) section displays only the currently released WBTs. For each WBT, the figures show the total count of end users required to complete the WBT and the total count of users that have completed WBT for the Subject Area, under the corresponding business process grouping, as reported in your *<Agency> Training Tracker* worksheet.



Currently Released - DM	Currently Released - IU	Currently Released - PR
Creating and Maintaing Encumbrances	**Managing IU Transactions**	**Maintaining Payroll Adjustments**
- Total Count of Users Required to Complete Training = 13	- Total Count of Users Required to Complete Training = 21	- Total Count of Users Required to Complete Training = 7
- Total Count of Users that have Completed Training = 10	- Total Count of Users that have Completed Training = 0	- Total Count of Users that have Completed Training = 0
Percent Complete = 76.93%	Percent Complete = 0%	Percent Complete = 0%
Entering and Processing Vouchers	**Processing IU Transactions**	**Managing Payroll Accounting**
- Total Count of Users Required to Complete Training = 7	- Total Count of Users Required to Complete Training = 22	- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 1	- Total Count of Users that have Completed Training = 0	- Total Count of Users that have Completed Training = 0
Percent Complete = 14.29%	Percent Complete = 0%	Percent Complete = 0%
Managing AP/PO Transactions		**Processing Payroll**
- Total Count of Users Required to Complete Training = 4		- Total Count of Users Required to Complete Training = 9
- Total Count of Users that have Completed Training = 0		- Total Count of Users that have Completed Training = 0
Percent Complete = 0%		Percent Complete = 0%
Managing Payments		**Setting Up and Maintaing Position Funding**
- Total Count of Users Required to Complete Training = 2		- Total Count of Users Required to Complete Training = 3
- Total Count of Users that have Completed Training = 0		- **Total Count of Users that have Completed Training = 1**
Percent Complete = 0%		Percent Complete = 33.33%
Setting Up and Maintaining Suppliers		
- Total Count of Users Required to Complete Training = 8		
- Total Count of Users that have Completed Training = 3		
Percent Complete = 2.67%		

Figure 29: Currently Released BPG Subject Areas

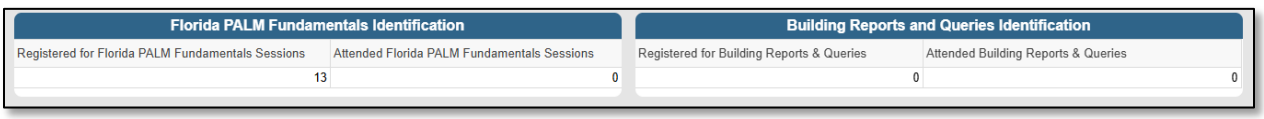
- *Total Count of Users Required to Complete Training* displays the total count of users that are required to complete the WBT for the Subject Area (i.e., they have been assigned an end user role within), as indicated in your *<Agency> Training Completion Tracker* worksheet.
- *Total Count of Users that have Completed Training* displays the total count of users required to complete the WBT and that have been reported as having completed the WBT for the Subject Area, per your *<Agency> Training Completion Tracker* worksheet.
    - This does **not** count WBTs that are reported as complete but are not required based on role assignment.
- *Percent Complete* indicates the percent of end users that have completed the required WBT as reported in your *<Agency> Training Completion Tracker* worksheet (Total Count of Users that have Completed Training / Total Count of Users Required to Complete Training).

***NOTE**: If percent complete is less than 95.00%, the row will be yellow. If percent complete is 95.00% or greater, the row will be green.*

Review the Training Completion Tracker Supplemental to learn more on how to complete this section.

In Person Training Sessions

The In Person Training Sessions (Figure 30) reports display your agency's total number of registrants and attendees for all In Person Trainings for the reporting month.



Florida PALM Fundamentals Identification		Building Reports and Queries Identification	
Registered for Florida PALM Fundamentals Sessions	Attended Florida PALM Fundamentals Sessions	Registered for Building Reports & Queries	Attended Building Reports & Queries
13	0	0	0

Figure 30: In Person Training Session Identification

Data Readiness Section

The Data Readiness (Figure 31) section is designed to help you understand your agency's current data readiness progress and status.

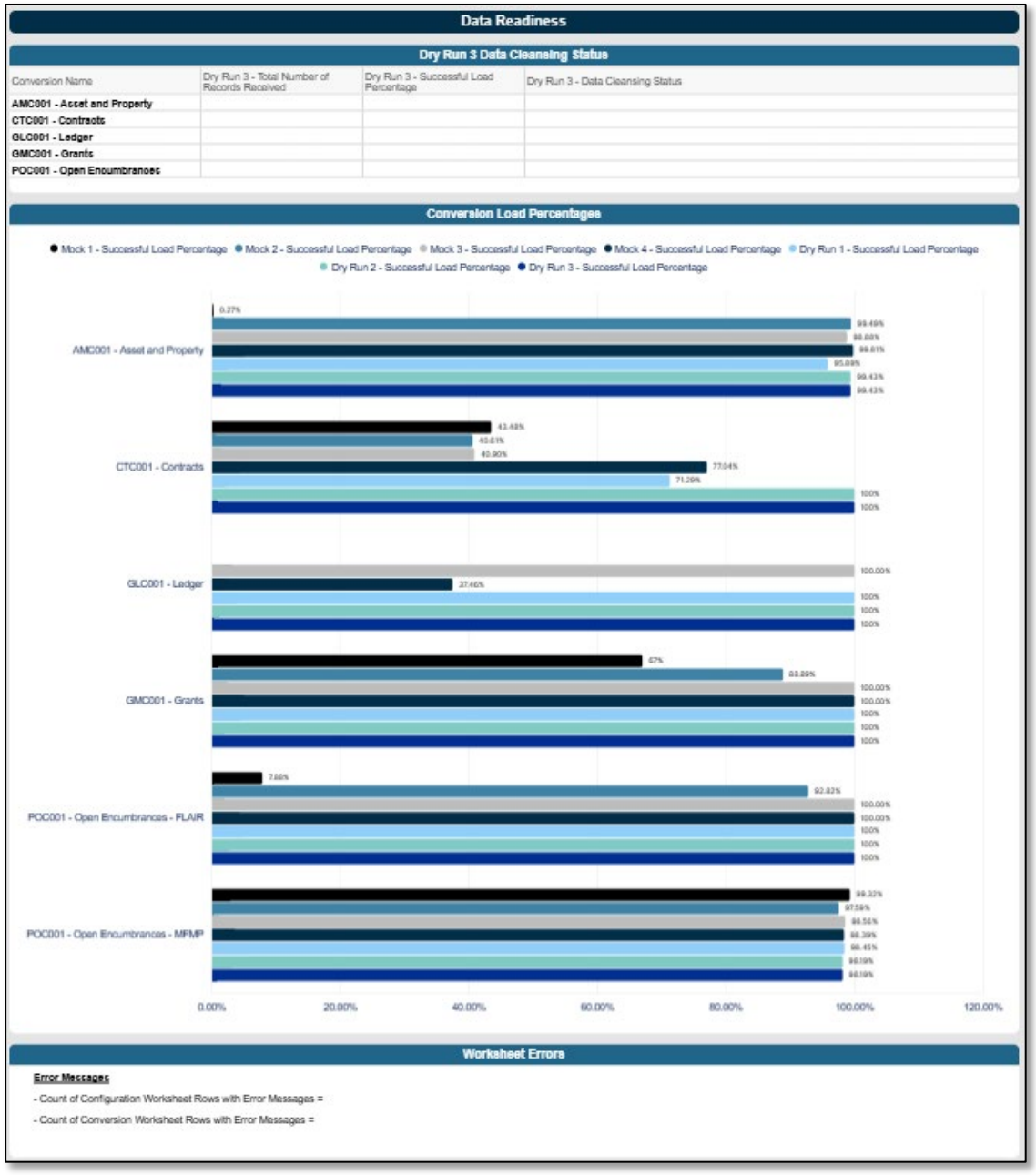
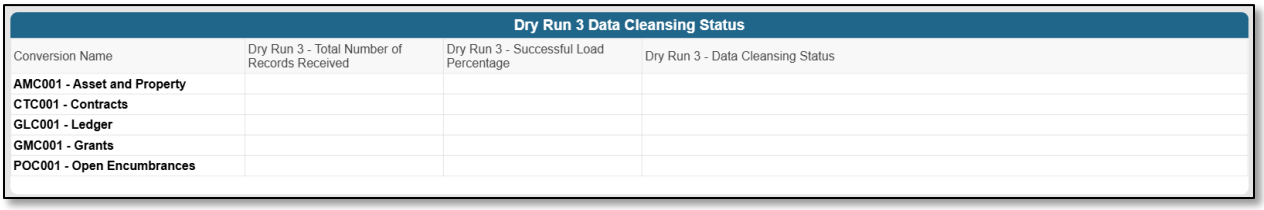


Figure 31: Data Readiness section

Dry Run 3 Data Cleansing Status

The Dry Run 3 Data Cleansing Status (Figure 32) displays your agency's final cleansing progress reported for Dry Run 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 conversion, the percentage of records that successfully loaded for the 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.
- *Not Applicable* indicates your agency has opted to not participate in the conversion.



Dry Run 3 Data Cleansing Status

Conversion Name	Dry Run 3 - Total Number of Records Received	Dry Run 3 - Successful Load Percentage	Dry Run 3 - Data Cleansing Status
AMC001 - Asset and Property			
CTC001 - Contracts			
GLC001 - Ledger			
GMC001 - Grants			
POC001 - Open Encumbrances			

Figure 32: Dry Run 3 Data Cleansing Status

Conversion Load Percentages

The Conversion Load Percentages (Figure 33) displays the percentage of your agency's conversion records that successfully loaded in each Mock Conversion or Dry Run cycle, as shown in your *<Agency> Mock Conversions* worksheet.

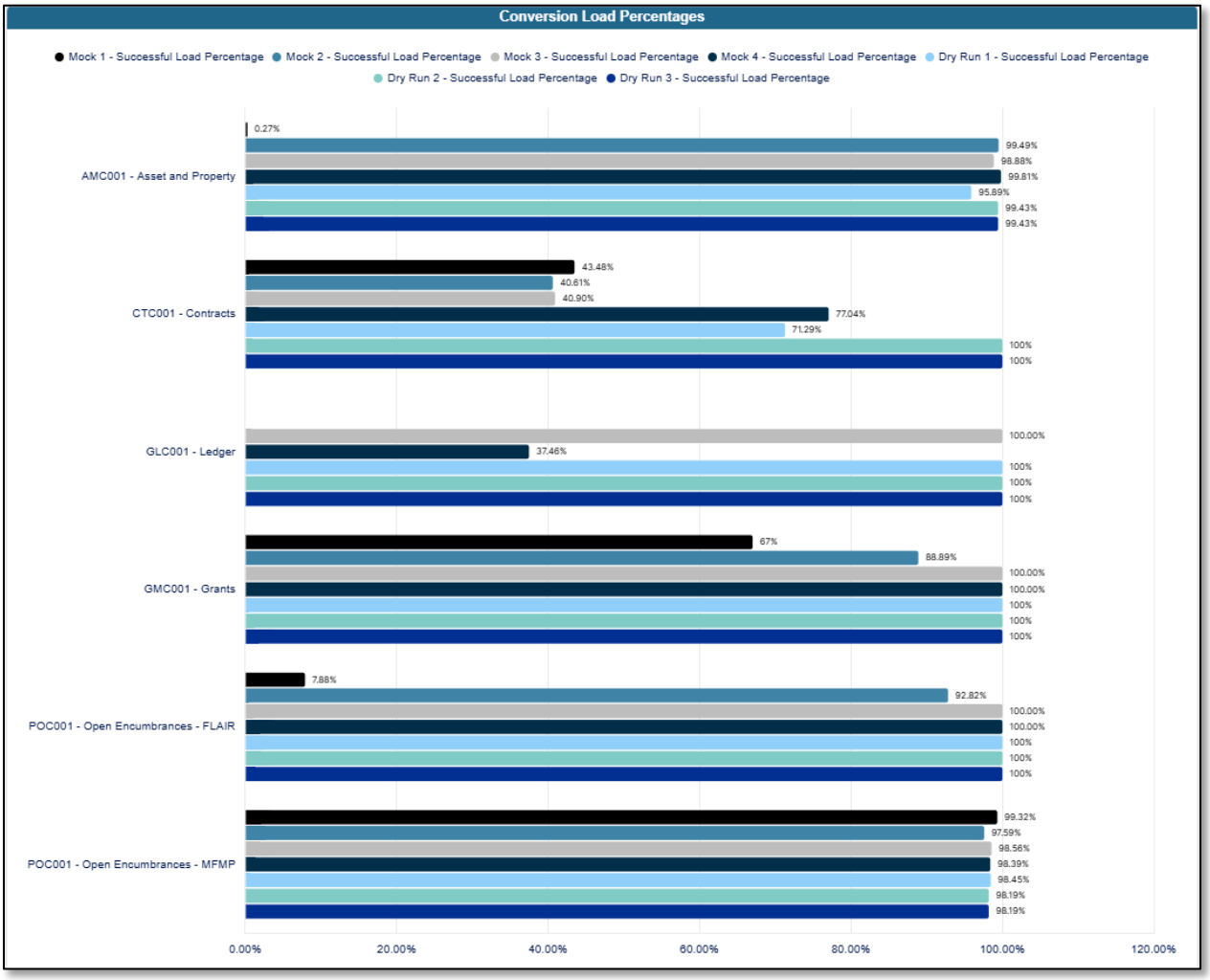


Figure 33: Conversion Load Percentages

NOTE: *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.*

Worksheet Errors

The Worksheet Errors (Figure 34) section displays a total count of rows in error in your agency's:

- combined configuration workbooks, and
- combined conversion worksheets

You can view all errors in your *<Agency> Consolidated Error Message Report* and review the individual worksheet supplemental documents for guidance on how to resolve worksheet errors.

NOTE: *Worksheet error counts may not be reflective of all issues requiring updates in a workbook. There may be missing data or other errors captured by conditional formatting that may not be captured in the Error Message counts.*

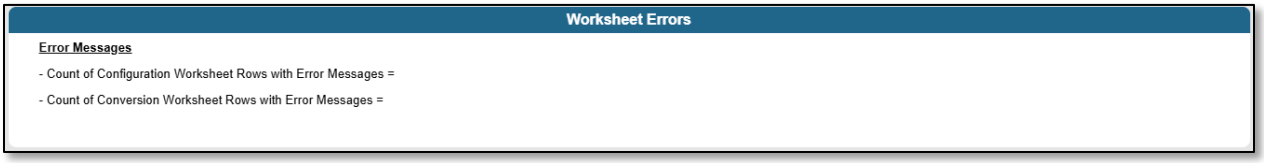


Figure 34: Worksheet Errors

Project Management Section

The Project Management section (Figure 35) offers an overview of your agency's risk and issue management activities and Readiness Certification #3 mitigation status updates for the reporting period.

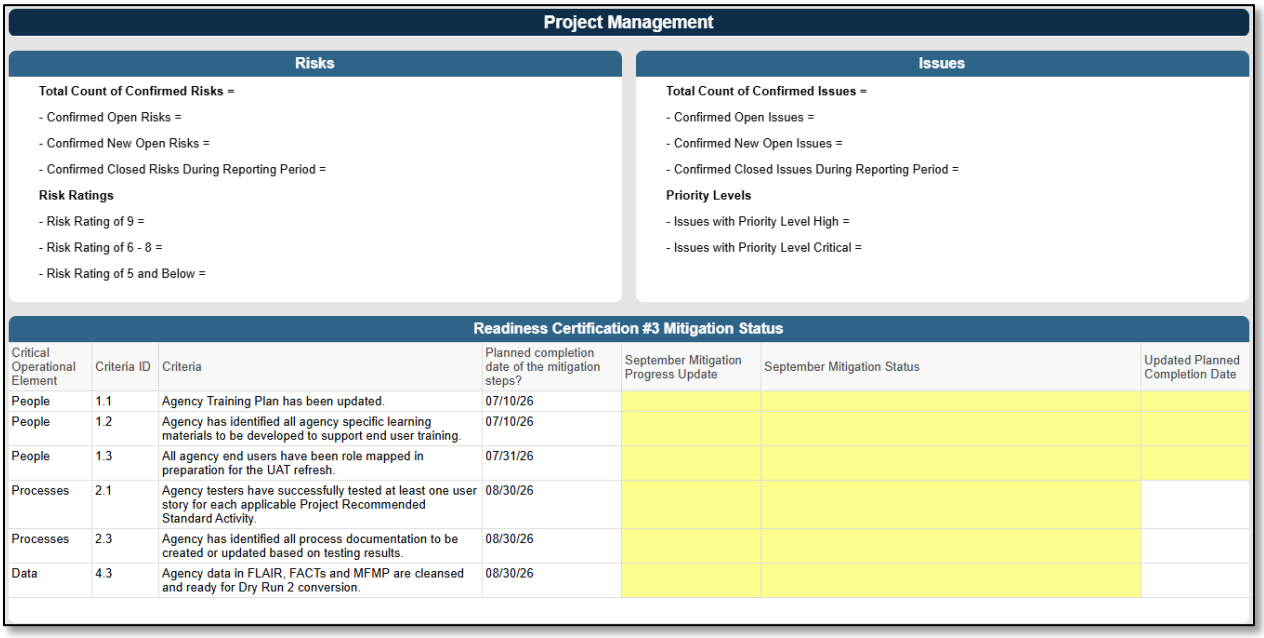


Figure 35: Project Management Section

Risks

The Risks (Figure 36) section summarizes your agency's confirmed risks for the reporting period. This data is pulled from your *<Agency> Risks* worksheet.

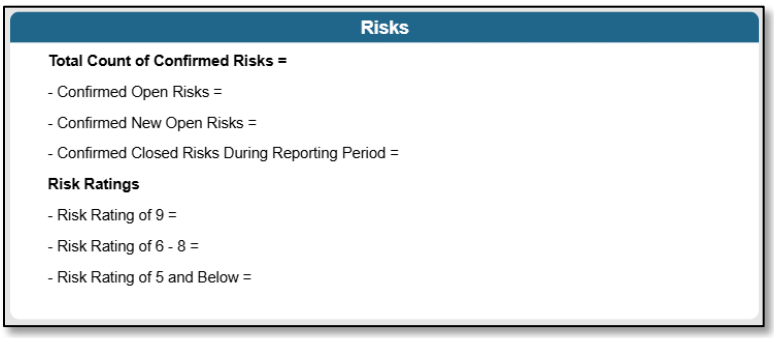


Figure 36: Risks

- *Total Count of Confirmed Risks* indicates your agency's total number of confirmed risks for the reporting period.
- *Confirmed Open Risks* indicates your agency's count of confirmed risks that are open during the reporting period.
- *Confirmed New Open Risks* indicates your agency's count of confirmed risks that were opened during the current reporting period.
- *Confirmed Closed Risks During Reporting Period* indicates your agency's count of confirmed risks that were closed during the current reporting period.
- *Risk Rating of 9* displays the count of your agency's confirmed, open risks that have a rating of 9.
- *Risk Rating of 6-8* displays the count of your agency's confirmed, open risks that have a rating of 6-8.
- *Risk Rating of 5 and Below* displays the count of your agency's confirmed, open risks that have a rating of 5 and below.

Issues

The Issues (Figure 37) section summarizes your agency's confirmed issues for the reporting period. This data is pulled from your *<Agency> Issues* worksheet.

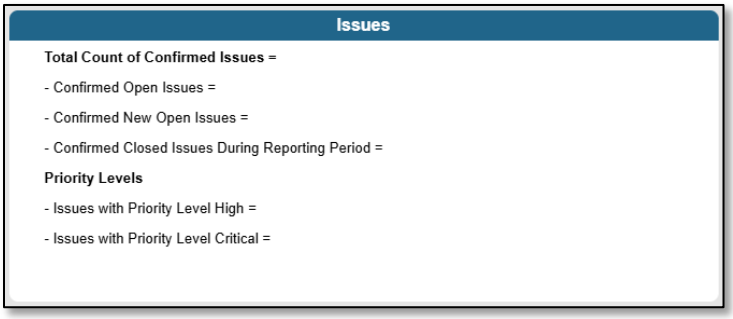


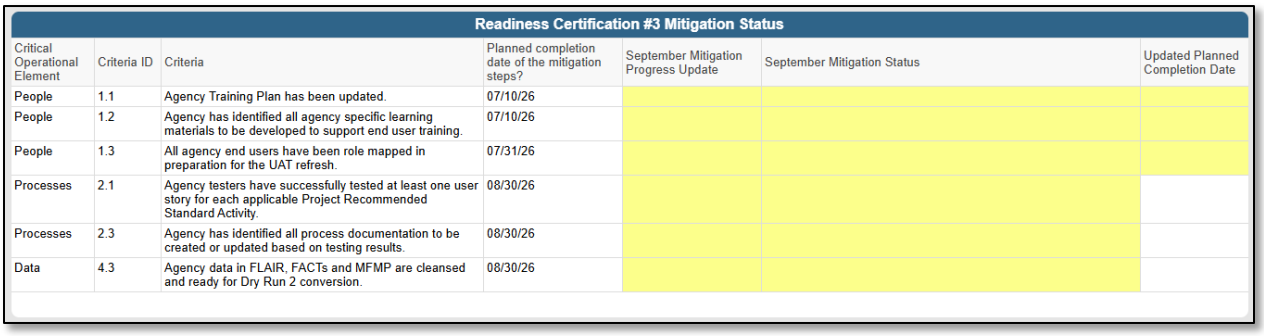
Figure 37: Issues

- *Total Count of Confirmed Issues* indicates your agency's total number of confirmed issues for the reporting period.
- *Confirmed Open Issues* indicates your agency's count of confirmed issues that are open for the reporting period.
- *Confirmed New Open Issues* indicates your agency's count of confirmed issues that were opened during the current reporting period.
- *Confirmed Closed Issues During Reporting Period* indicates your agency's count of confirmed issues that were closed during the current reporting period.
- *Issues with Priority Level High* indicates the count of your agency's issues that have a priority level of 'High'.
- *Issues with Priority Level Critical* indicates the count of your agency's issues that have a priority level of 'Critical'.

Review the Risk and Issues Supplemental for more information on how to complete this section.

Readiness Certification #3 Mitigation Status Update

The Readiness Certification #3 Mitigation Status Update (Figure 38) report displays status updates to mitigation plans that were submitted for any criteria 'not met' for Agency Readiness Certification #3.



Readiness Certification #3 Mitigation Status

Critical Operational Element	Criteria ID	Criteria	Planned completion date of the mitigation steps?	September Mitigation Progress Update	September Mitigation Status	Updated Planned Completion Date
People	1.1	Agency Training Plan has been updated.	07/10/26			
People	1.2	Agency has identified all agency specific learning materials to be developed to support end user training.	07/10/26			
People	1.3	All agency end users have been role mapped in preparation for the UAT refresh.	07/31/26			
Processes	2.1	Agency testers have successfully tested at least one user story for each applicable Project Recommended Standard Activity.	08/30/26			
Processes	2.3	Agency has identified all process documentation to be created or updated based on testing results.	08/30/26			
Data	4.3	Agency data in FLAIR, FACTs and MFMP are cleansed and ready for Dry Run 2 conversion.	08/30/26			

Figure 38: Readiness Certification #3 Mitigation Status

NOTE: *If your agency has completed all mitigation this section will not appear in your Monthly Progress Report Dashboard.*

Review the Readiness Certification #3 Mitigation Supplemental for more information on how to complete this section.

Deployment and Cutover Section

The Deployment and Cutover section displays data collected from your Cutover Checklist.

Cutover Checklist

The Cutover Checklist (Figure 39) section provides data on the total amount of tasks and their progress that have been listed in your *<Agency> Cutover Checklist* worksheet.

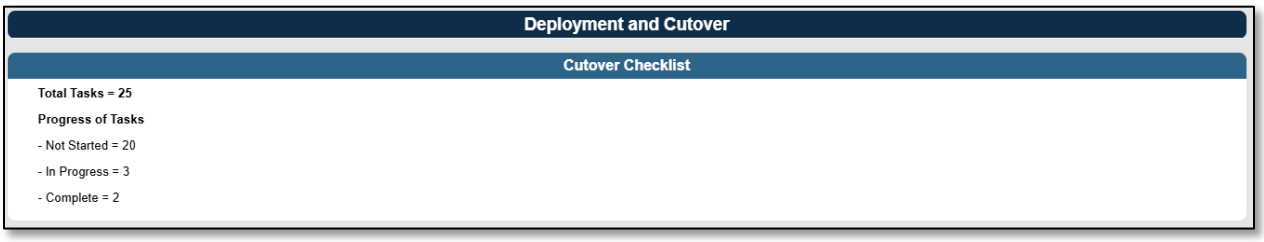


Figure 39: Cutover Checklist Widget

- *Total Tasks* indicates your agency's total number of tasks in your Cutover Checklist.
- *Not Started* indicates the total number of tasks with a progress status of "Not Started".
- *In Progress* indicates the total number of tasks with a progress status of "In Progress".
- *Complete* indicates the total number of tasks with a progress status of "Complete".

Review the Cutover Checklist Supplemental for more information on how to complete this section.

Submission Section

The Submission (Figure 40) section includes a form for your Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

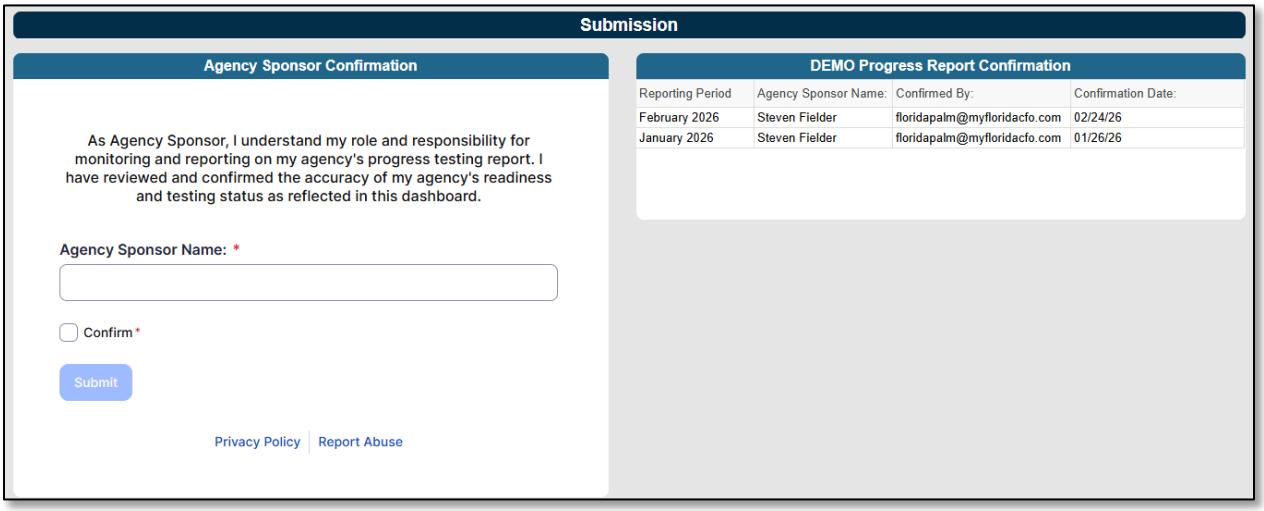


Figure 40: Submission

Agency Sponsor Confirmation

The Agency Sponsor Confirmation (Figure 41) section allows for easy submission of the Monthly Progress report. For each reporting period, Primary or Backup Agency Sponsors must review all Dashboard information and provide confirmation that the data represented is accurate.

***NOTE**: This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration.*

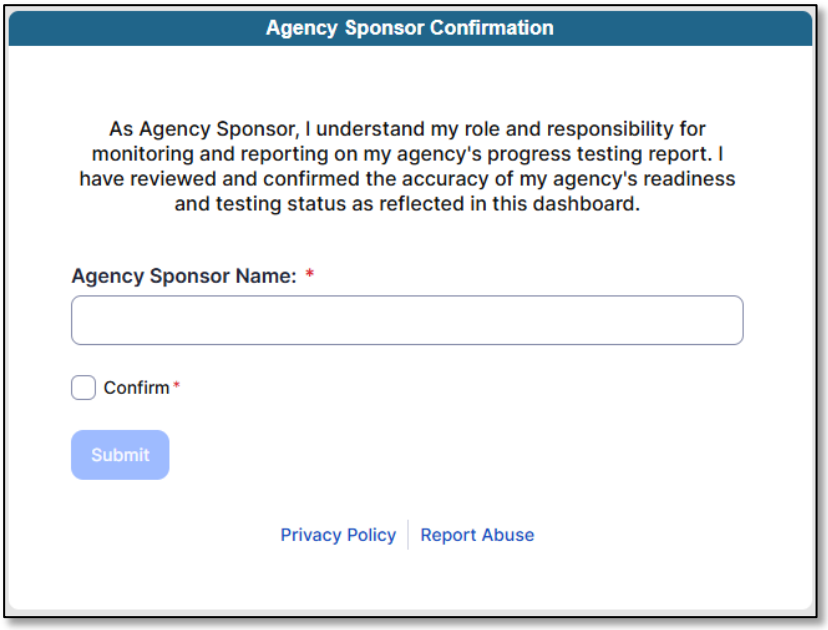
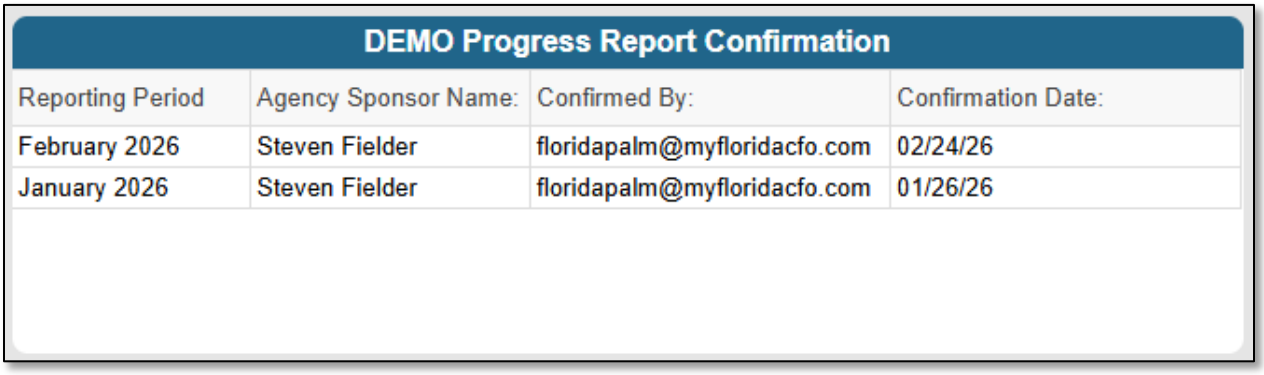


Figure 41: Agency Sponsor Confirmation

Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation (Figure 42) section.



DEMO Progress Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
February 2026	Steven Fielder	floridapalm@myfloridacfo.com	02/24/26
January 2026	Steven Fielder	floridapalm@myfloridacfo.com	01/26/26

Figure 42: Agency Sponsor Confirmation History