

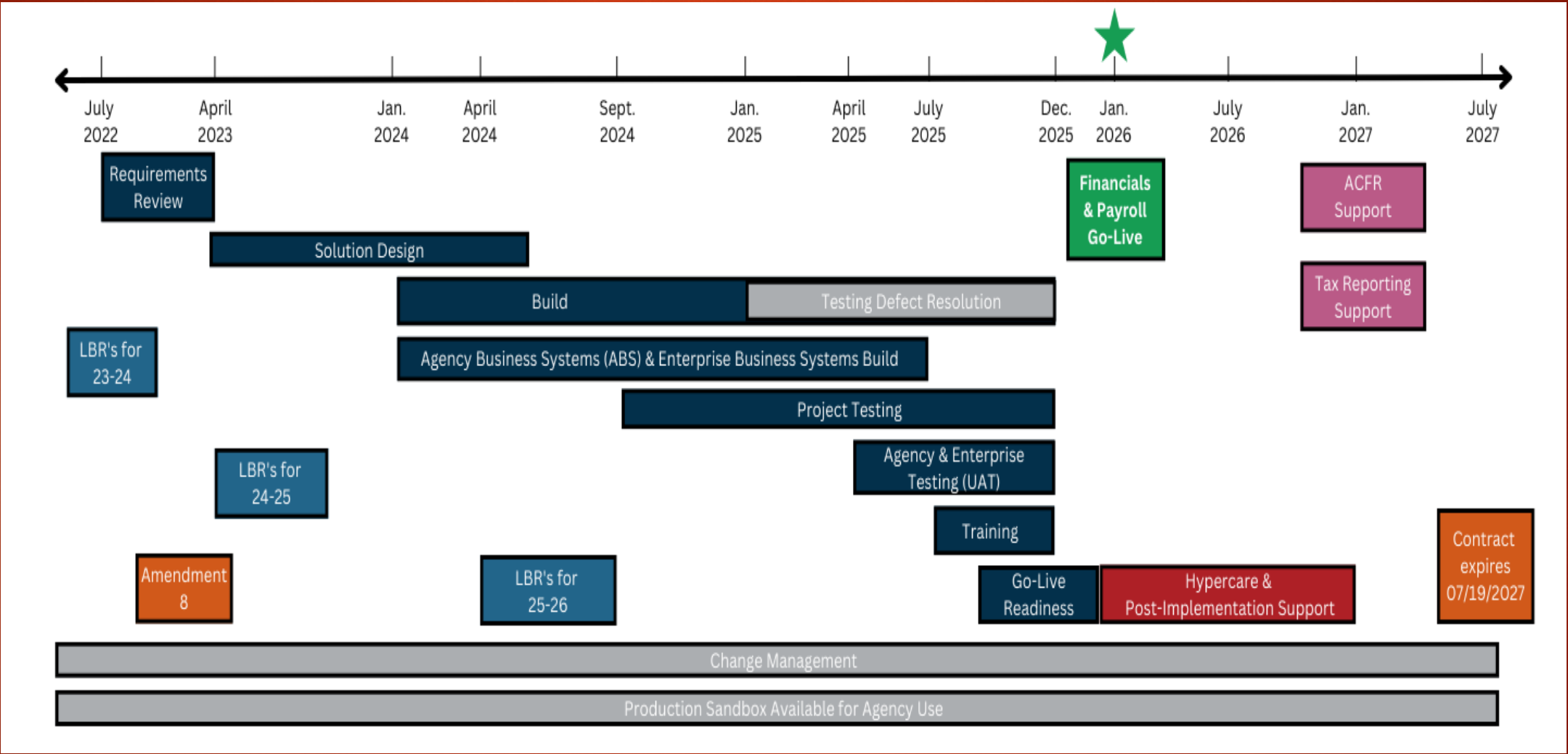


Florida PALM Update

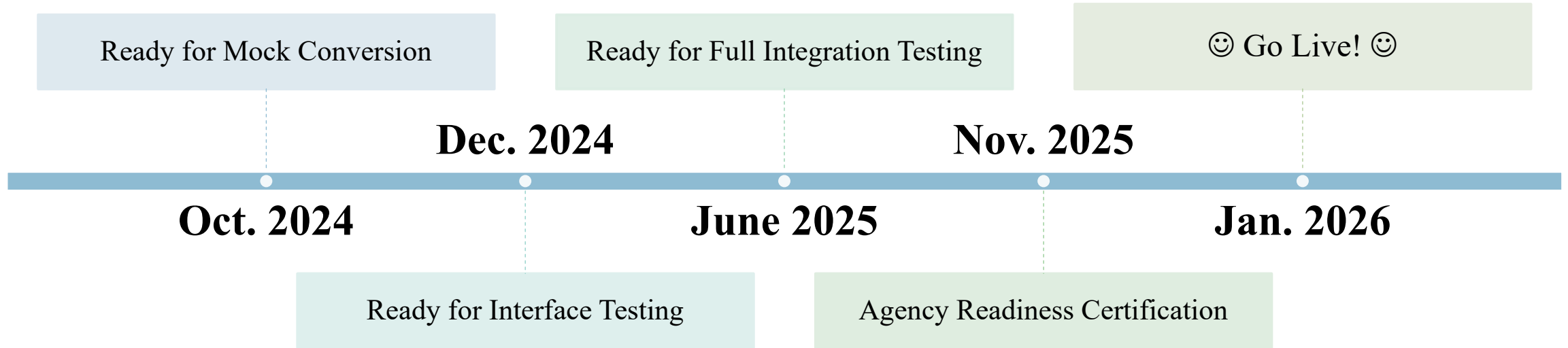
FLORIDA COMMERCE

FEBRUARY 14, 2024

PALM TIMELINE



Key Milestones



Current Readiness Tasks

Task	Task Talk Video & Instructions	Release Date	Due Date
<u>512 – Identify Future PALM End Users</u>	<u>Register and Watch Here</u>	01/16/2024	03/01/2024
<u>513 – Complete Configuration Workbooks for Segment I and II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>514 – Complete Data Readiness Analysis & Data Cleansing Activities for Segments I and II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>515 – Identify Change Impacts & Update Agency Business Process Documentation for Segments I and II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>516 – Update Agency Business System Documentation for Segment II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>517 – Update Florida PALM Conversion Inventory for Segment II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>518 – Update Florida PALM Interface Inventory for Segment II</u>	<u>Register and Watch Here</u>	01/29/2024	04/12/2024
<u>519 – Remediate Agency Business Systems based on Segment I</u>	<u>Register and Watch Here</u>	01/29/2024	06/28/2024

SME Team by Task

Task	<u>512</u>	<u>513</u>	<u>514</u>	<u>515</u>	<u>516</u>	<u>517</u>	<u>518</u>	<u>519</u>
Lead SME	Lisa S.	Dean M.	Dean M.	Lisa S.	Lisa S.	Lisa S.	Lisa S.	Lisa S.
SME	Stephen H.	Lemuel T.	See Implementation Plan for detailed list of team members.	See F & A Contact List for detailed list of team members.	Lemuel T.	Lemuel T.	Lemuel T.	Lemuel T.
SME		Aniseh A.			Ken H.	Ken H.	Ken H.	Ken H.
SME		Elijah L.			Dean M.	Dean M.	Dean M.	Dean M.
SME		Ramone S.						
SME		Budget Chief						
SME		Tisha W.						
SME		Lisa S.						
SME								

New Way of Working on PALM

- ▶ No more lengthy PALM task emails 😊
- ▶ Kick-off meetings for each task
- ▶ Personalized Agency Working Sessions (PAWS) for each task
- ▶ Commerce PALM TEAMS Team (Coming Soon 😊)

Kick-Off Meeting Format

Facilitator: Tulani Honablew, Project Manager

- **Introduce Task Instructions** - Facilitator
- **Preliminary Discussion** - Facilitator
 - Identify additional team members (i.e. backups, need to know, etc.)
 - Identify resources (people, tools, etc.)
- **Technical Discussion** – Lead SME
 - What does this mean for Florida Commerce?
 - What are the technical requirements/expectations of task?
 - Will this task require documentation updates?
 - Are there any internal decisions that need to be made?
 - Review technical material(s)
- **Wrap-Up** – Facilitator
 - Initial risks, issues, concerns, assumptions
 - Team Action Expectations
 - Get acquainted with task material(s)
 - Be prepared to engage during subsequent **PAWS** (Personalized Agency Working Session)

PAWS



- **Brief Task Instructions Review** - Facilitator
- **Brief Preliminary Discussion** - Facilitator
 - Identify additional team members (i.e. backups, need to know, etc.)
 - Identify resources (people, tools, etc.)
- **Technical Discussion** – Lead SME
 - Technical deep dive technical requirements and expectations
 - What does this mean for our program area?
 - Identify SMEs based on technical requirements/expectations of task
 - Are there any documentation updates to be made?
 - Are there any internal decisions that need to be made?
- **Wrap-Up** – Facilitator
 - Risks, issues, concerns, assumptions
 - Team Action Expectations
 - Continue to get acquainted with task material(s)
 - Be prepared to engage during subsequent **PAWS** (Personalized Agency Working Session)

Upcoming Meetings & Workshops



PALM Hosted Meetings

Meeting	Date	Time	Location	Registration
Advisory Council Meeting	February 21, 2024	10a – 12p		No virtual option
Task Talks	Thursdays	10a – 10:30a		See Current Tasks slide
*Florida PALM Readiness Touchpoint Meeting	February 20, 2024	11a – 12p	G-32 & Virtual	Send me an email
Segment III Design Meetings	See next slide			

**** - please make effort to attend Touchpoint Meeting***

Segment III Design Meetings & Information

- Phase: February 2024 – April 2024
- *Financial Wave BPM*

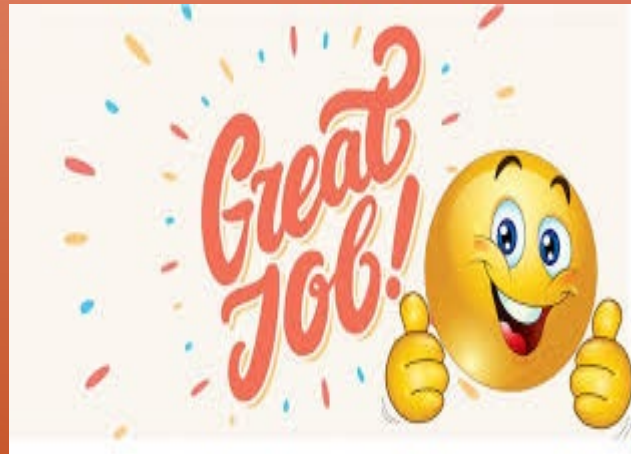
	Date	Time	Online Registration
Disbursement Management <i>Topic(s) of Discussion:</i> <ul style="list-style-type: none"> • 30.1 Set Up and Maintain Suppliers • 30.3.5 Enterprise Process Vouchers (Pcard) 	February 12, 2024	8:30a – 12p	<u>Virtual Attendance</u>
Asset Accounting and Management <i>Topic(s) of Discussion: 40.2 Deploy and Maintain Assets</i>	February 12, 2024	1:30p – 5p	<u>Virtual Attendance</u>
Accounts Receivables, Revenue Accounting, and Grants Management <i>Topic(s) of Discussion:</i> <ul style="list-style-type: none"> • 50.1 Set Up and Maintain Customer • 60.1 Enter and Maintain Receivables • 60.2.2 AR Deposits • 90.2.4 Monitor CMIA 	February 13, 2024	8:30a – 12p	<u>Virtual Attendance</u>
Account Management & Financial Reporting <i>Topic(s) of Discussion: 10.3.1 Perform Month End</i>	February 13, 2024	1:30p – 5p	<u>Virtual Attendance</u>

Completed Implementation Tasks

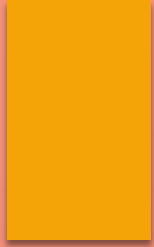


Readiness Tasks COMPLETED

*Each task title is linked to the Tuesday Task Talk page. You may view Task Instructions and other supplemental documents or updates. You will have access to associated video recordings as well.



TASK	DUE DATE
Task 324 – FLAIR Data Elements Inventory	03/31/2023
Task 325 – Data Security and Access Survey	02/03/2023
Task 326 – Update Current State Agency Business System Inventory and Documentation	10/27/2023
Task 327 – Reports Inventory	07/28/2023
Task 328 – Document Current Agency Business Processes	12/15/2023
Task 329 – Update CCN and Project Contacts	6/2/2023
Task 330 – Update Authorized Smartsheet Users	6/23/2023
Task 331 – Submit Bimonthly Agency Status Report	9/11/2023
Task 500 – Create Agency Specific Project Charter	12/15/2023
Task 501 – Create Agency Specific Implementation Schedule	12/15/2023
Task 502 – Create Agency Specific Risks & Issues Management Plan	12/15/2023
Task 503 – Create Workforce Readiness Plan	12/15/2023
Task 506 – Submit Bimonthly Agency Status Report (see Task 331)	11/13/2023



Readiness Tasks COMPLETED

*Each task title is linked to the Tuesday Task Talk page. You may view Task Instructions and other supplemental documents or updates. You will have access to associated video recordings as well.

TASK	DUE DATE
507 – Manage Agency Specific Implementation Schedule, Risks, and Issues	12/27/2023
508 – Review Payroll Wave Business Process Models	1/26/2024
509 – Submit Bimonthly Agency Business Status Report	1/10/2024
511 – Update CCN and Contacts	1/26/2024





Questions
anyone?

RESOURCES

NETWORK
CAPTURE

STORAGE

SEARCH
BUSINESS

SUGGEST
INFORMATION

BYT

BUSINESS
ASSET
ANALYSIS

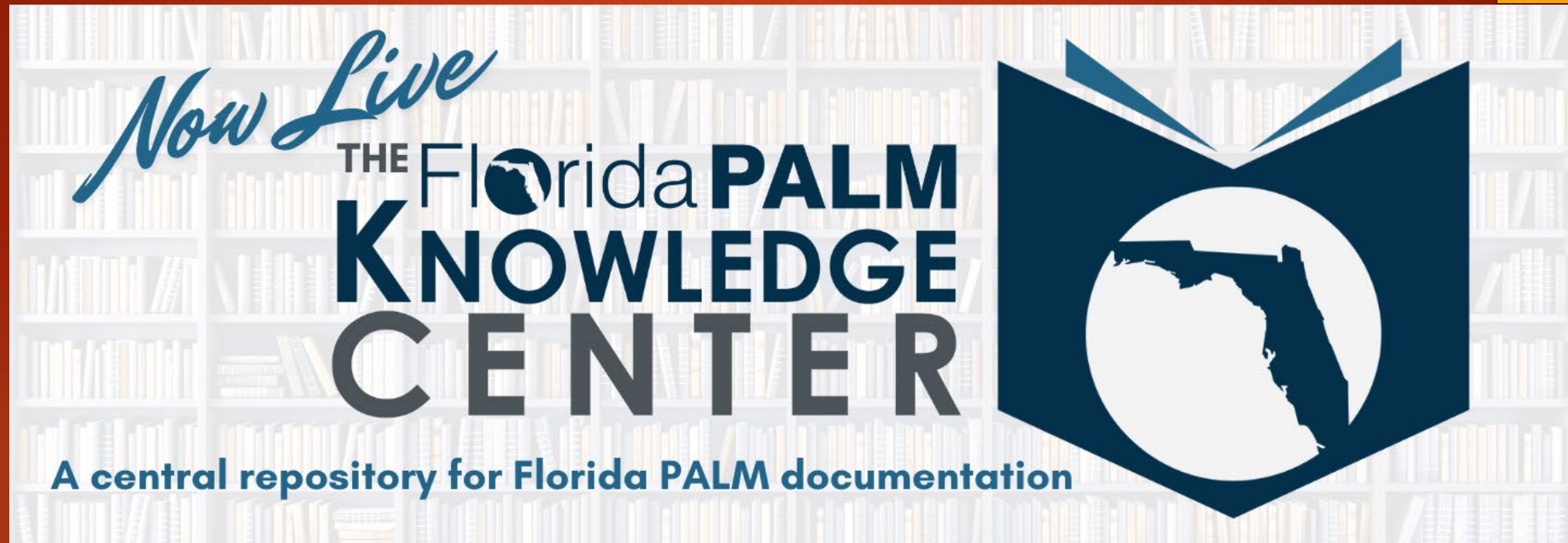
MARKETING

PALM

Resources

RESOURCE	Link
Agency Readiness Webpage	https://myfloridacfo.com/floridapalm/agency-readiness
Meetings and Workshops <ul style="list-style-type: none">• Advisory Council Meetings• CCN Forums• CCN Town Hall Meetings• Tuesday Task Talks (RW Tasks)	https://myfloridacfo.com/floridapalm/meetings-workshops
PALMcast *most episodes are 15 minutes or less	https://myfloridacfo.com/floridapalm/palmcast
Statewide Chart of Accounts Design	https://myfloridacfo.com/floridapalm/chart-of-accounts
Business Processes and Modules	https://myfloridacfo.com/floridapalm/business-processes-and-modules
Reporting	https://myfloridacfo.com/floridapalm/reporting
Interfaces	https://myfloridacfo.com/floridapalm/interfaces
Florida PALM Communications Subscription	https://app.smartsheet.com/b/form/01bce82ec64d4c9aa312af96aff86113
End User Training	https://myfloridacfo.com/floridapalm/user-support/end-user-training

😊 New PALM Resource 😊



The [Florida PALM Knowledge Center](#) will provide a consolidated source for documentation about the functions and use of Florida PALM, including *business process models*, *interfaces*, and *reports*. This central repository will replace the Pathfinder, which has been retired in anticipation of the roll out of the Knowledge Center.

☺ New PALM Resource ☺

Florida PALM Revenue and Expenditure Account ChartField values have been published!!

The new document, found on the Florida PALM [COA webpage](#), contains three tabs. The first includes “General Information” about the content of the document. The second includes the list of Revenue Accounts and identifying information (e.g., Grouping, Family). The third includes the Expenditure Accounts, which have been cross walked to the applicable FLAIR Object and / or General Ledger Code.



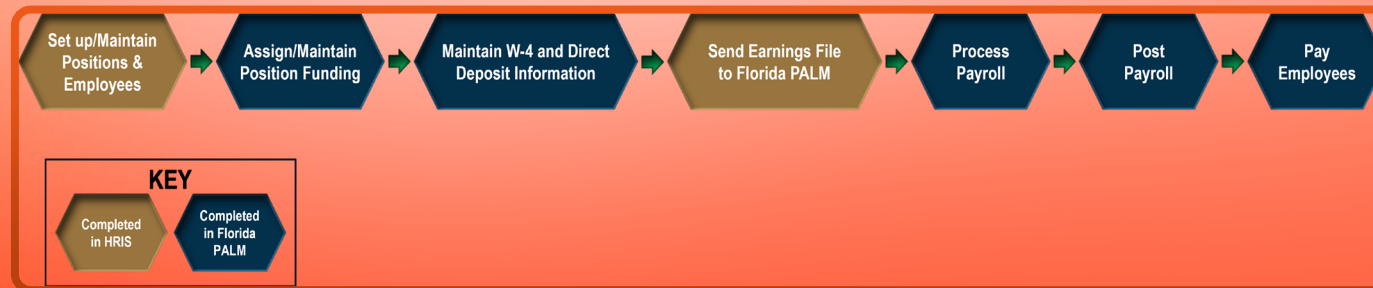
☺ New PALM Resource ☺

PAYROLL MANAGEMENT WEBPAGE

Information on this webpage will assist Commerce as we prepare for Payroll Wave implementation in January 2026, by building understanding of the changes anticipated with Florida PALM.

Most immediately, this webpage may help in completion of Readiness Workplan *Task 508: Review Payroll Wave Business Process Models*.

Information will be updated as we progress towards go-live, including adding new business process grouping-specific webpages in the near future.



Design Meetings Information – Segment II

Financials Wave BPM Reviews

BPM	Date	Material/Resources	Meeting Recording
Disbursements Management	12/5/2023	<ul style="list-style-type: none"> ➤ <u>Presentation</u> ➤ <u>30.2 Establish and Maintain Encumbrances</u> ➤ <u>30.4 Process Payments</u> ➤ <u>30.5 Manage Payments</u> 	Video Time: 3 hrs 24 mins <u>Register and View Meeting Here</u>
Asset Accounting and Management	12/5/2023	<ul style="list-style-type: none"> ➤ <u>Presentation</u> ➤ <u>40.1 Acquire and Set Up Assets</u> ➤ <u>40.3 Set Up and Maintain Asset Controls</u> 	Video Time: 3 hrs 4 mins <u>Register and View Meeting Here</u>
Account Management and Financial Reporting System Access and Controls	12/6/2023	<ul style="list-style-type: none"> ➤ <u>Presentation</u> ➤ <u>10.2 Enter and Process Journals</u> ➤ <u>120.1 Interface Error Handling Process</u> 	Video Time: 2 hrs 39 mins <u>Register View Meeting Here</u>

Design Meetings Information – Segment II

Financials Wave BPM Reviews

BPM	Date	Material/Resources	Meeting Recording
Accounts Receivable	12/7/2023	<ul style="list-style-type: none">➤ <u>Presentation</u>➤ <u>60.2 Deposit and Apply Receipts</u>	Video Time: 1 hr 18 mins <u>Register and View Meeting Here</u>
Grants Management Contracts Management	12/7/2023	<ul style="list-style-type: none">➤ <u>Presentation</u>➤ <u>90.2 Create and Maintain Grants</u>➤ <u>90.3 Create and Maintain Contracts</u>	Video Time: 1 hr 54 mins <u>Register and View Meeting Here</u>

Design Meetings Information – Segment II

Financials Wave Design Workshops

BPM	Date	Material/Resources	Meeting Recording
Disbursements Management	1/10/2024	<ul style="list-style-type: none"> ➤ Presentation ➤ 30.4 Process Payments ➤ 30.5 Manage Payments 	Video Time: 4 hrs 43 mins Register and View Meeting Here
Asset Accounting and Management	1/11/2024	<ul style="list-style-type: none"> ➤ Presentation ➤ 40.1 Acquire and Set Up Assets ➤ 40.3 Set Up and Maintain Asset Controls 	Video Time: 5 hrs Register and View Meeting Here
Disbursements Management	1/12/2024	<ul style="list-style-type: none"> ➤ Presentation ➤ 30.2 Establish and Maintain Encumbrances 	Video Time: 4 hrs 5 mins Register View Meeting Here

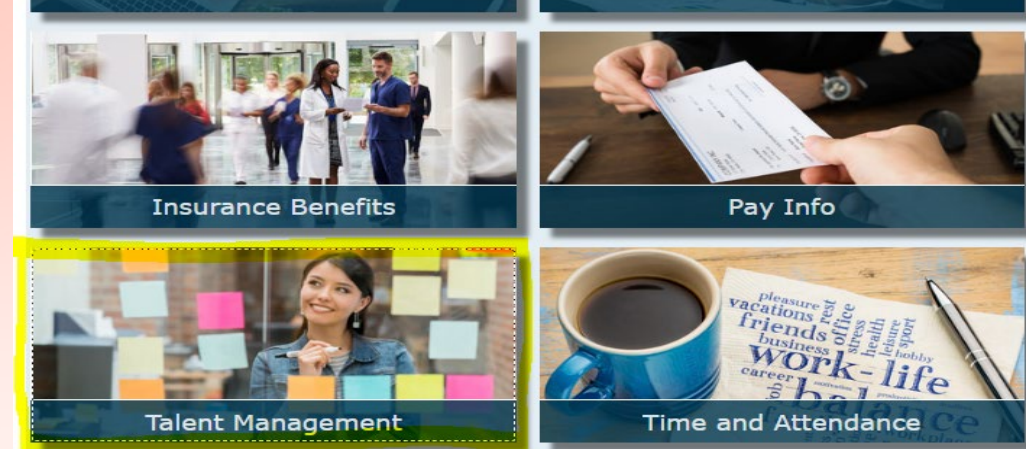
Design Meetings Information – Segment II

Financials Wave Design Workshops

BPM	Date	Material/Resources	Meeting Recording
Accounts Receivables	1/16/2024	<ul style="list-style-type: none"> ➤ Presentation ➤ 60.2 Deposit and Apply Receipts 	Video Time: 3 hrs 32 mins Register and View Meeting Here
Grants Management Contracts Management System Access and Controls	1/17/2024	<ul style="list-style-type: none"> ➤ Grants and Contracts Presentation ➤ Grant Structure (Draft) Presentation ➤ 90.2 Create and Maintain Grants ➤ 90.3 Create and Maintain Contracts ➤ Interface and Error Handling Process Presentation ➤ 120.1 Interface Error Handling Process 	Video Time: 4 hrs 29 mins View Meeting Here (as of 2/12/24)
Account Management and Financial Reporting	1/18/2024	<ul style="list-style-type: none"> ➤ Presentation ➤ 10.2 Enter and Process Journals 	Video Time: View Meeting Here (as of 2/12/24)

People First Training

*Type PALM into search bar



Quick Actions



Organizational Resources

