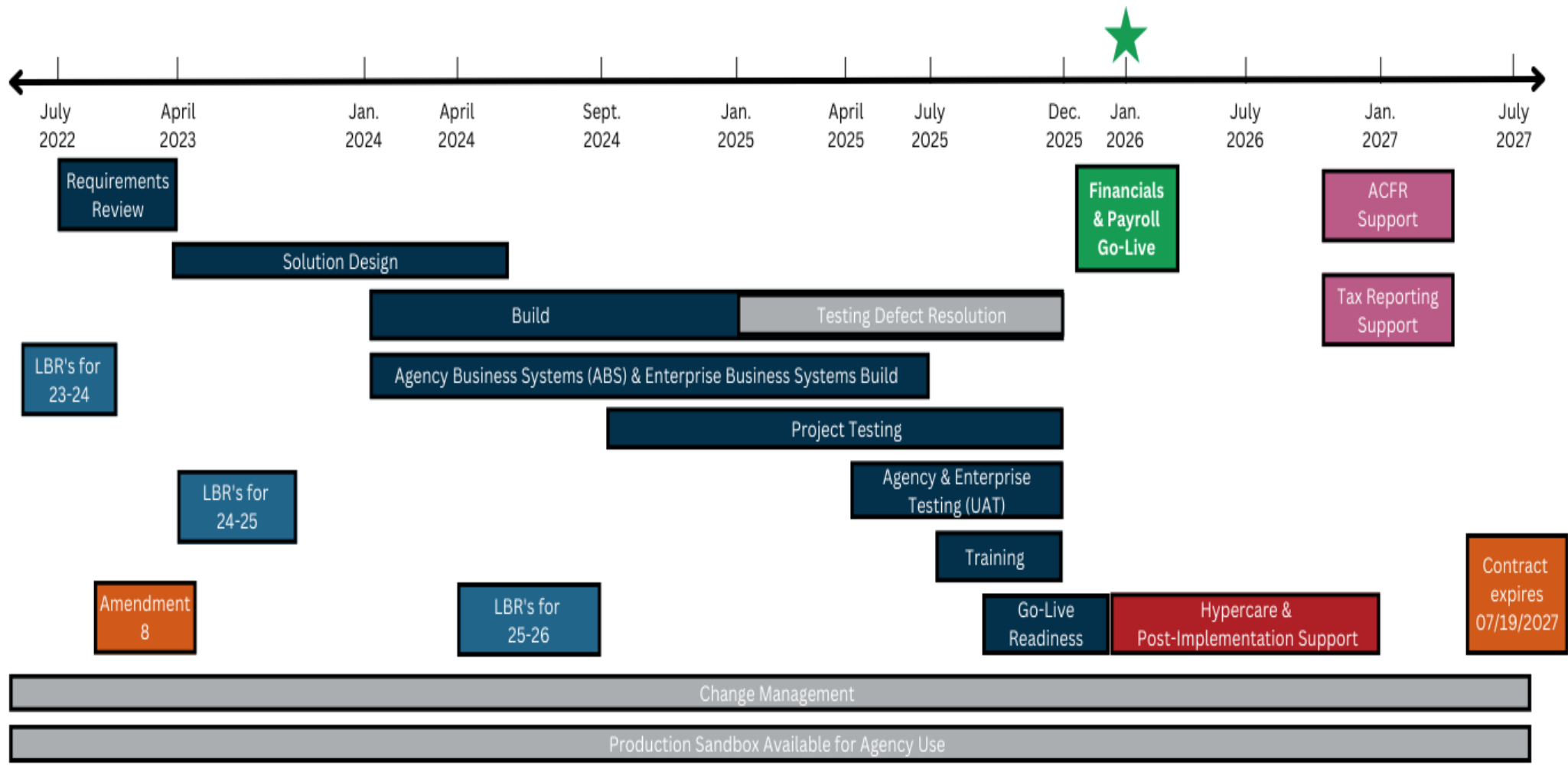


# FLORIDA COMMERCE PALM UPDATE

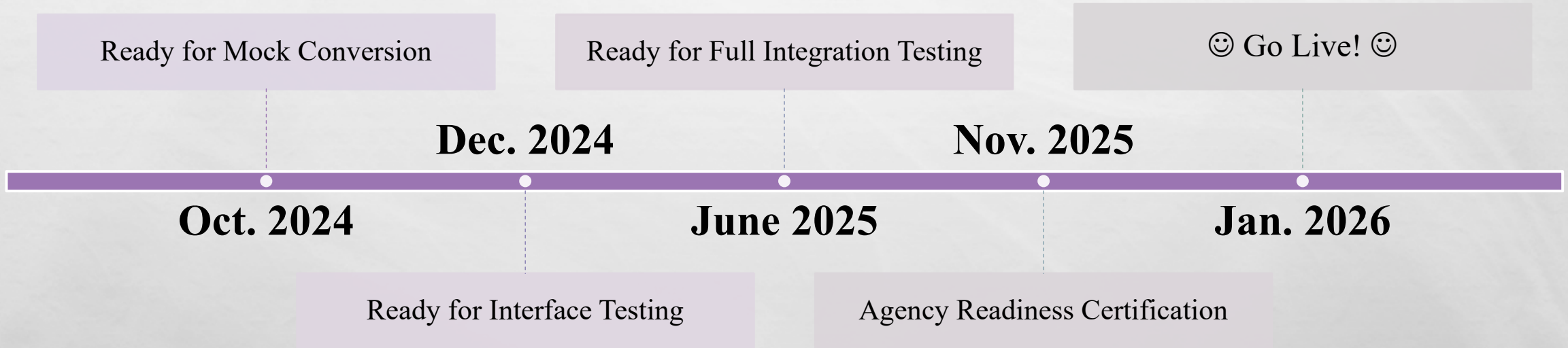
MARCH 13, 2024



# PALM TIMELINE



# KEY MILESTONES



# CURRENT READINESS TASKS

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

# SME TEAM BY TASK

Task	<u>513</u>	<u>514</u>	<u>515</u>	<u>516</u>	<u>517</u>	<u>518</u>	<u>519</u>
<b>Lead SME</b>	Dean M.	Dean M.	Lisa S.	Lisa S.	Lisa S.	Lisa S.	Lisa S.
<b>SME</b>	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.
<b>SME</b>	Aniseh A.			Ken H.	Ken H.	Ken H.	Ken H.
<b>SME</b>	Elijah L.			Dean M.	Dean M.	Dean M.	Dean M.
<b>SME</b>	Ramone S.						
<b>SME</b>	Budget Chief						
<b>SME</b>	Tisha W.						
<b>SME</b>	Lisa S.						
<b>SME</b>							

# WILL FLORIDA PALM AFFECT YOU?

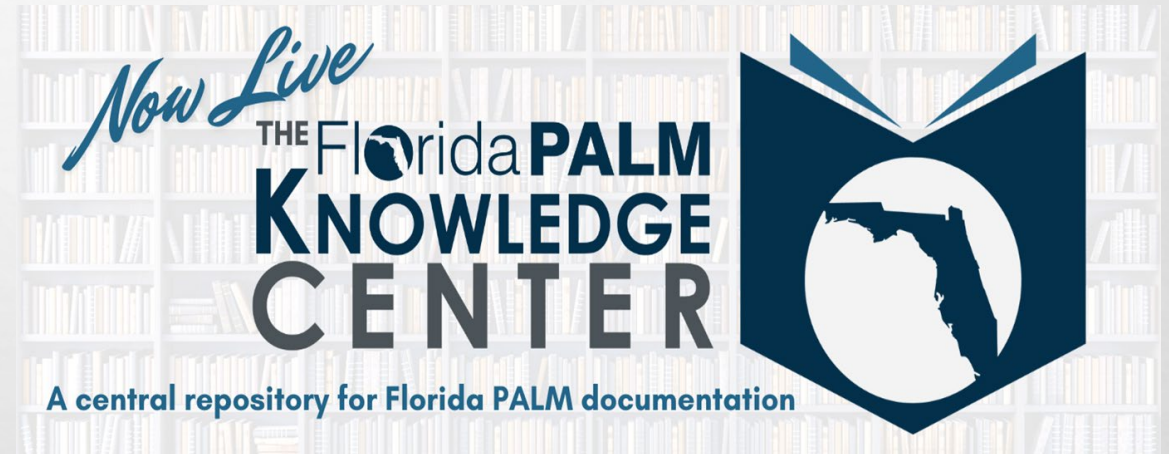


**Change Champion Network**   
Journey to Success with Florida PALM

Last Modified: February 2024

# IF YOU SAID YES, THEN...

- GET FAMILIAR WITH PALM
  - VISIT THE KNOWLEDGE CENTER 😊
  - SEE RESOURCE SECTION OF THIS SLIDE SHOW



# **UPCOMING MEETINGS & WORKSHOPS**





# FLORIDA COMMERCE HOSTED PALM MEETINGS

Meeting	Date	Time	Registration
PALM Update	4/10/2024	10a – 10:15a	
Task Team Meetings	TBA	TBA	

# PALM HOSTED MEETINGS

Meeting	Date	Time	Location	Registration
Task Talks	Thursdays	10a – 10:30a	Virtual	See Current Tasks slide
Sponsor Summit	April 11, 2024	9a – 11a	DCF	N/A
*Florida PALM Readiness Touchpoint Meeting	April 15, 2024	11a – 12p	132 & Virtual	Send me an email
Segment IV Design Meetings				

# SEGMENT IV DESIGN MEETINGS

■ PHASE: MAY 2024 – SEPT 2024

■ *FINANCIAL WAVE BPM*

Design Workshop	Date	Time
Project Costing	July 23 – 24, 2024	TBA
Accounts Payable / Purchase Order	July 25, 2024	TBA
Inter / IntraUnit	August 13 – 14, 2024	TBA
Asset Management	August 15, 2024	TBA
Payroll	August 27-29, 2024	TBA
Carry Forward / Certified Forward	September 10, 2024	TBA
Cash Check / Financial Statement Close / Budget Close	September 11-12, 2024	TBA
Design Recap	October 1-3, 2024	TBA



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***COMPLETED  
READINESS  
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
<a href="#"><u>Task 324 – FLAIR Data Elements Inventory</u></a>	03/31/2023
<a href="#"><u>Task 325 – Data Security and Access Survey</u></a>	02/03/2023
<a href="#"><u>Task 326 – Update Current State Agency Business System Inventory and Documentation</u></a>	10/27/2023
<a href="#"><u>Task 327 – Reports Inventory</u></a>	07/28/2023
<a href="#"><u>Task 328 – Document Current Agency Business Processes</u></a>	12/15/2023
<a href="#"><u>Task 329 – Update CCN and Project Contacts</u></a>	6/2/2023
<a href="#"><u>Task 330 – Update Authorized Smartsheet Users</u></a>	6/23/2023
<a href="#"><u>Task 331 – Submit Bimonthly Agency Status Report</u></a>	9/11/2023
<a href="#"><u>Task 500 – Create Agency Specific Project Charter</u></a>	12/15/2023
<a href="#"><u>Task 501 – Create Agency Specific Implementation Schedule</u></a>	12/15/2023
<a href="#"><u>Task 502 – Create Agency Specific Risks &amp; Issues Management Plan</u></a>	12/15/2023
<a href="#"><u>Task 503 – Create Workforce Readiness Plan</u></a>	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
<a href="#">507 – Manage Agency Specific Implementation Schedule, Risks, and Issues</a>	12/27/2023
<a href="#">508 – Review Payroll Wave Business Process Models</a>	1/26/2024
509 – Submit Bimonthly Agency Business Status Report	1/10/2024
511 – Update CCN and Contacts	1/26/2024
512 – Identifying Future Florida PALM End Users	3/1/2024





QUESTIONS  
ANYONE?

MANAGEMENT  
INFORMATION TECHNOLOGY

RESOURCES

DATA

INFORMATION

QUALITY

# RESOURCES

NETWORK  
CAPTURE

STORAGE

SEARCH

BUSINESS

SUGGEST  
INFORMATION

BYT

BUSINESS  
ANALYSIS

MARKETING



# NEW CONTENT ALERT!!!

- NEW REPORTS, INTERFACES, AND CONVERSIONS FOR SEGMENT III OF THE DESIGN PHASE ARE NOW AVAILABLE AT THE KNOWLEDGE CENTER

SAMPLE:

AP HOLDS BY HOLD TYPE REPORT (APR091)" HAS BEEN ADDED TO THE KNOWLEDGE CENTER

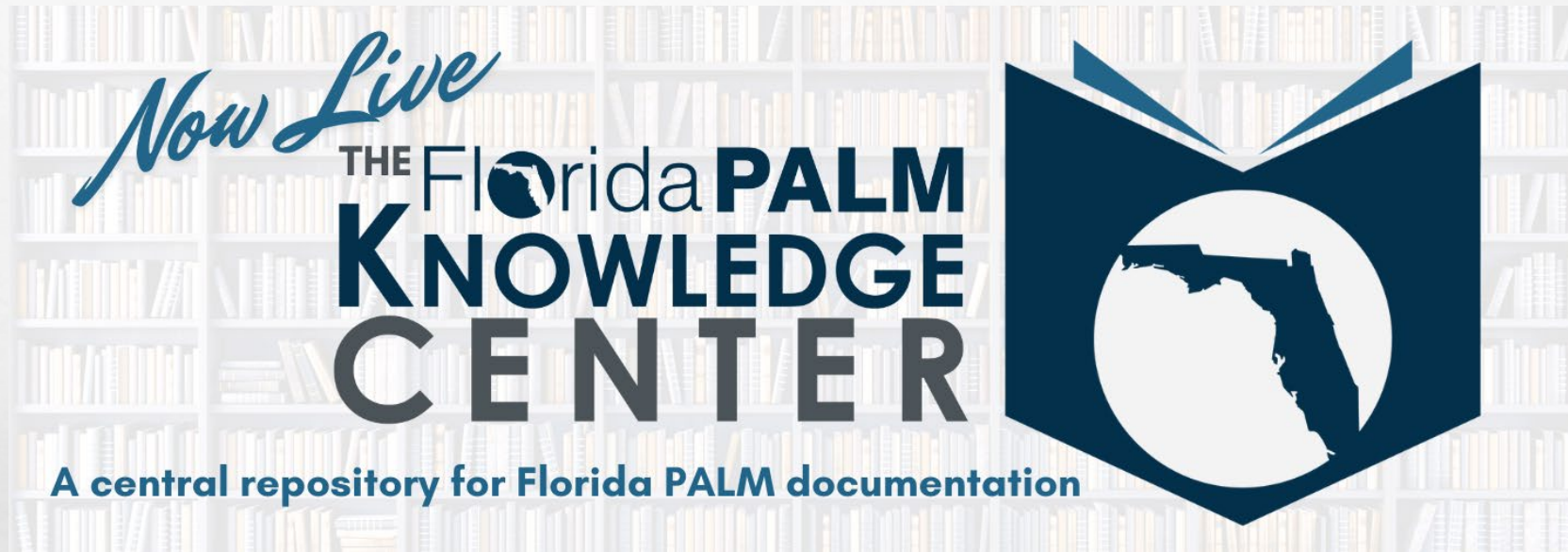
AP Holds by Hold Type Report  
(APR091)

New

# ***PALM RESOURCE QUICKLINKS***

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

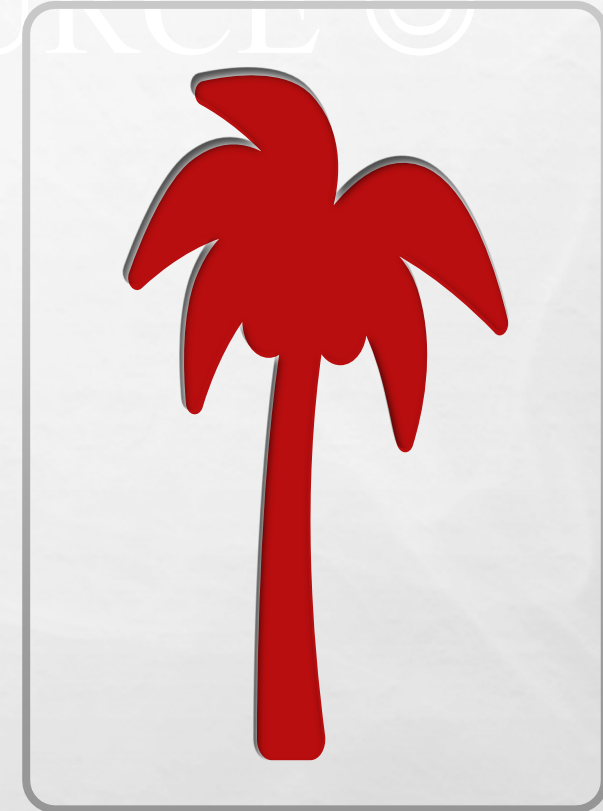
# ☺ NEW PALM RESOURCE ☺



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.

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.



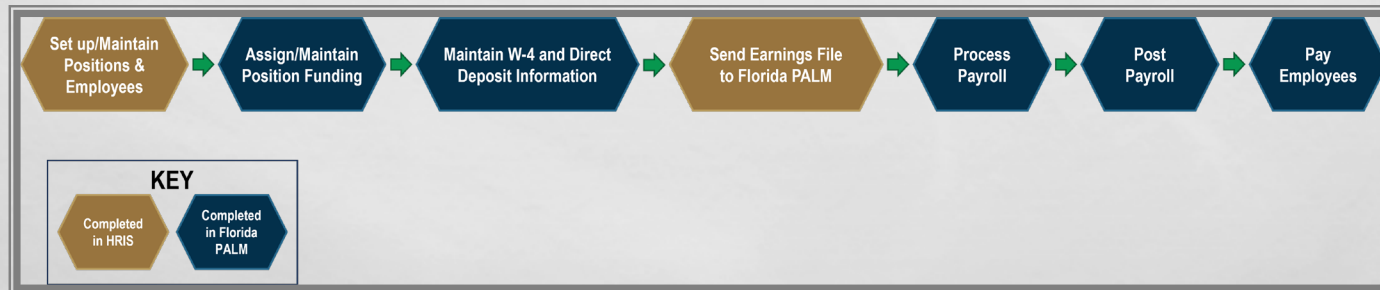
# ☺ NEW PALM RESOURCE ☺

## 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.



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

# DESIGN MEETINGS INFORMATION – SEGMENT II FINANCIALS WAVE BPM REVIEWS



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

## DESIGN MEETINGS INFORMATION – SEGMENT II FINANCIALS WAVE BPM REVIEWS



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

# DESIGN MEETINGS INFORMATION – SEGMENT II FINANCIALS WAVE DESIGN WORKSHOPS





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

# DESIGN MEETINGS INFORMATION – SEGMENT II FINANCIALS WAVE DESIGN WORKSHOPS



# PEOPLE FIRST TRAINING

\*TYPE *PALM* INTO THE  
SEARCH BAR



Personal Info

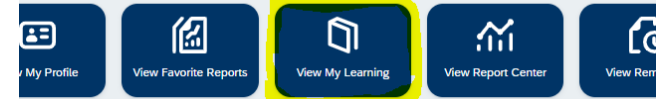


Insurance Benefits



Talent Management

Work Actions



Organizational Resources

