

Task Instructions

Task ID: FUNC55

Wave: Financials Wave

Task Name: Confirm Understanding of Planned Florida PALM Functionality for the Financials Wave and Submit Business Transformation Plan

Task Type: Business Processes

Task Due Date: January 21, 2022

Task Overview

Your agency has participated in Module Workgroups and gained a better understanding of the Financials Wave business processes, interfaces, data conversions, and reports for the Accounts Payable (AP), Purchasing (PO), General Ledger (GL), Accounts Receivable (AR), Billing (BI), Cash Management (CM), Commitment Control (KK), Asset Management (AM), Project Costing (PC), and Grants modules. Discussions during the Module Workgroups were designed to help your team plan for the adoption of Florida PALM functionality at the Financials Wave. Your agency has previously identified obstacles, if any, that may prohibit your adoption of the standardized Florida PALM functionality (FUNC53 and FUNC54). Following submission of these tasks, your agency may have met with the Project team to discuss steps to overcome obstacles. Use the feedback template provided to confirm understanding of the planned Florida PALM functionality for the Financials Wave. Document your agency's planned steps to overcome identified obstacles, if applicable. Your responses for this task should align with your Business System Analysis and Interface Inventory documented in the TECH121 Technical Workbook. Record one response for your agency. Your response may be discussed during a monthly Touchpoint.

What will the Florida PALM Team do with this information?

The Florida PALM Team will use this information to support your agency as you begin your business transformation to adopt Florida PALM. The Project will also share responses with the Executive Steering Committee (ESC) prior to their approval of the additional detail incorporated into the Business Process Models in early 2022.

Task Instructions

Work with your agency's Change Champion Network (CCN) and those who previously attended the Module Workgroups to coordinate who will be completing each of the items involved with this task.

| Instructions |
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| 1) Plan for the adoption of AP, PO, GL, AR, BI, CM, KK, AM, PC, and Grants module functionality following the Module Workgroups. |
| 2) Confirm understanding of the planned Florida PALM functionality for the Financials Wave on the feedback template provided. |
| 3) If obstacles were identified during FUNC53 and FUNC54, document the steps to overcome the obstacles on the template provided. |
| 4) Be prepared to discuss the steps for obstacle resolution with your Readiness Coordinator during the monthly touchpoint. |
| 5) Submit the feedback template by January 21, 2022 to FloridaPALM@myfloridacfo.com |

Supporting Materials & Resources:

- [Feedback Template](#) to Confirm Understanding of AP, PO, GL, AR, BI, CM, KK, AM, PC, and Grants functionality

- [Meetings & Workshops](#) (*session recording, session outline, study guide, updated Business Process Models*)
- [Pathfinder](#)