

Task Instructions

Task ID: *TECH119*

Wave: *Financials Wave*

Audience: *All Agencies, All Enterprise Partners*

Task Name: *Create Interface Connection Inventory*

Task Type: *Interfaces*

Task Due Date: *October 1, 2021*

Task Overview

The Florida PALM Catalog of Interface Offerings in Smartsheet (TECH113) has been updated to align with the Financials Wave interfaces offerings and include some interface layouts (TECH117). As a reminder, the remaining interface layouts will be added to the Catalog of Interface Offerings through September.

In addition, you began analyzing your current agency business systems to understand your agency data needs (FUNC41).

For the agency business systems you plan to retain, identify the Florida PALM interfaces your agency plans to implement for the Financials Wave. A Florida PALM Technical Inventory was created as one workbook to help you document necessary interfaces and conversions, as well as an agency business systems analysis. Please note the Spreadsheet Uploads are not included in the Interface Connection Inventory, as these will not be needed for interface testing and will be covered through a separate MRW task prior to User Acceptance Testing (UAT).

Attend the Module Workgroups this fall to gain a better understanding of the business processes, interface files, data conversions, and reports. A future task will provide additional information on the timing of interface testing to assist with completing the Technical Inventory (Timeline section).

What will the Florida PALM Team do with this information?

The Project team will use your agency's identified interfaces to maintain a consolidated list for the Financials Wave implementation. This information will also be used to support interface testing activities.

Task Instructions

Please work with your agency's Change Champion Network (CCN) and team familiar with Financials Wave functions to coordinate who will be completing each of the items involved with this task.

Instructions

- 1) *Review and begin completing the Florida PALM Technical Inventory with your agency's CCN and staff familiar with your agency's data and business needs.*
- 2) *Attend and participate in Module Workgroups to gain an understanding of the business processes, interface files, data conversions, and reports.*
- 3) *Begin completing the **Interface Connection Inventory Tab** by following the steps provided on the **Interface Instructions Tab**.*
 - a. *Macros will need to be enabled by selecting "Enable Content" when the document is opened.*
 - b. *Certain columns have been locked from editing, including CMS Wave Interface selections.*

c. For Central Wave Interfaces selected prior to the shift in implementation approach, select “Yes” or “No” to retain these in your Financials Wave Interface Connection Inventory.

4) Your Readiness Coordinator will review your progress for this task at a Readiness Touchpoint.

5) Contact your Readiness Coordinator if you have detailed or technical questions regarding the Interface Connection Inventory.

Supporting Materials & Resources:

- *Florida PALM Technical Inventory*
- [Catalog of Interface Offerings](#)
- [Standardized Business Process Models](#)
- [Interface Approach](#)