

## Task Instructions

**Task ID:** RPTG18

**Wave:** Financials Wave

**Task Name:** Review and Respond to the Reports Catalog and Survey

**Task Type:** Reporting

**Task Due Date:** December 17, 2021

### Task Overview

Review the Reporting Approach, Reports Catalog, and other Florida PALM resources, such as the Pathfinder, Business Process Models, and Module Workgroup recordings, to consider your agency's reporting and data needs. Then, share feedback on the planned Florida PALM reports by completing a reporting survey to capture your data needs.

### Reporting Approach

The [Florida PALM Reporting Approach](#) has been updated to describe how agency data needs will be met. Review this document first to better understand what Florida PALM will offer through standard reports, online inquiries, queries, data extracts, and dashboards.

### Reporting Catalog

The [Reports Catalog](#) has been updated to include the reports available in Florida PALM at the Financials Wave. The term "Reports" includes Florida PALM reports that are formatted for printing or publishing, data queries and extracts within Florida PALM, and online inquiries within Florida PALM. You should review the catalog to see if the reports will meet your agency-specific reporting needs. These reports were identified in collaboration with agencies, during the Business Process Model activities. Feedback on the Reports Catalog should be submitted through the reporting survey.

### Reporting Survey

Complete **one** reporting survey for your agency. The survey response should represent a collective review and analysis of the Reports Catalog and your agency's data needs with your team. Survey responses should be consolidated and provided using Survey Monkey: <https://www.surveymonkey.com/r/PR8GN8M>.

To facilitate collaboration within your agency, the survey questions are listed here:

- 1) Based on your review of the Reports Catalog, do the identified reports and the key data elements of each report, meet your expected agency reporting needs? If not, please describe any additional reports or data elements (for specific reports) needed to meet agency reporting needs.
- 2) For the Financials Wave, what are your agency's expected needs for the number of users to be assigned to a query writer role in order to create agency specific queries in Florida PALM?
- 3) Does your agency use agency-managed reporting tools? If so, please describe the tools and the sources of the information.
- 4) Please describe the specific types of financial and accounting data maintained in your agency business systems or databases.
- 5) Please describe how your agency uses the Information Warehouse.
- 6) Does your agency anticipate obstacles to adopt usage of Florida PALM reports? If so, please describe.

- 7) Please identify specific reports that your agency is required to submit or publish which include multiple years of information. If applicable, please identify the law or other requirement for this report and any other information regarding the report specifications.
- 8) Please describe expected data needs which require the use of both legacy and Florida PALM information.

### What will Florida PALM Team do with this information?

The Florida PALM Team will use agency feedback to validate the Reports Catalog and will consider agency feedback for specific report designs.

### Task Instructions

Please work with your Change Champion Network and team familiar with Financials Wave reporting functions to coordinate who will be completing each of the items involved with this task.

Instructions
1) <i>Review the Reporting Approach to understand how Florida PALM will meet your reporting and data needs.</i>
2) <i>Review the Reports Catalog to understand the planned reports within Florida PALM at the Financials Wave.</i>
3) <b>Complete one reporting survey</b> in Survey Monkey to share your agency's feedback on the Reports Catalog and your agency's specific needs by <b>December 17, 2021</b> .
4) <i>If you have questions regarding the Reports Catalog, meetings with the Florida PALM Team should be coordinated through your Agency Liaison.</i>

### Supporting Materials & Resources:

- [Reporting Approach](#)
- [Reports Catalog](#)
- [Reporting Survey](#)