Asset Management Module Configurations

This workbook contains two worksheets that represent core configuration components in Florida PALM. Column/field definitions and instructions are provided below. This configuration workbook contains the following Asset Management module configurations to which agency-specific values are being obtained to setup in Florida PALM:

- Location Definition
- Area ID Values

NOTE: *The data provided in these worksheets are the configured values based on agencies RW Task 513 submission.*

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Inventories > Configuration Workbook Inventory > Asset Management (AM)

Location Definition

Figure 1: Location Definition Worksheet in Smartsheet

Configuration Value Definition

'Location Definition' indicates an agency's physical location (e.g., address) for each Location Code.

Business Process and Subprocess

The Location Definition configuration supports the following business process and subprocess:

Table 1: Location Business Process and Subprocess

Business Process	Business Subprocess
40.3 Set up and Maintain Asset Controls	N/A

Configuration Value Purpose and Use

- All Florida PALM modules use Location Address information to process and record agency transactions.

Configuration Design Details

The following design considerations are applied when defining Location Definition values in Florida PALM:

- Location Codes are values that represent unique sites or locales that populate Location Address values in Florida PALM.
- Location Code values are ten (10) characters in length and are established based on the physical locations of each agency.
- Location Code values are agency-specific and available only for transactions by the associated agency; these values are not shared across all agencies.
- Location Address information is labeled optional in the workbook because some locations may not have a 911 address. If there is valid address information available, please complete each address field for each Florida PALM Location Code.
- Location Codes are required in Florida PALM and will be required to convert existing FLAIR property items.
- Project Locations must be configured through the Asset Location configuration task, if different from Asset Locations. Project Location is not a required field.

The following assumptions are considered when defining a Location value:

- Agencies may enter additional addresses at the bottom of the Location Definition sheet, if an agency sees any missing locations.
- Values entered in the Florida PALM Location Code column must be agency unique.
- Attempts to create duplicate Florida PALM Location Codes will result in system error message.
- If the configured location addresses provided in the worksheet are incorrect, agencies will make corrections directly in those fields on the Location Definitions worksheet.
- Area IDs are optional configuration values that will be provided by agencies, if applicable, in a separate configuration workbook.

Florida PALM Location Code
The following information is intended to establish guidance in administering Location Codes in Florida PALM. Agencies will create a 10-character Florida PALM Location Code for each agency-occupied location address. There are two types of Location Codes in Florida PALM, which are included in the Location Definition worksheet:

- Agency Primary Location – used for administrative purposes only. Each agency will have one primary location.
- Agency Locations – used for recording daily operational transactions. Each agency will have multiple agency locations.

Agency Primary Location
The Agency's Primary Location is made up of the following:

- Agency Business Unit
- Agency Acronym

Example:

Agency: Department of Financial Services
Location Code: **43000_DFS**

(1st thru 5th Positions): **43000** = Agency Business Unit
(6th thru 10th Positions): **_DFS** = Agency Acronym

Agency Locations

The Agency Location Code is made up of the following:

- 2-character County Number
- 8-character identifier determined by the agency

Using the Location Code the Florida PALM:

Example 1:

Agency: Department of Health
Location: Alachua Regional Service Center East
Location Code = **01RegionaE**

(1st & 2nd Positions): **01** = Alachua County
(3rd thru 10th Positions): **RegionaE** = Agency defined location identifier

Example 2:

Agency: Department of Agriculture and Consumer Services
Location: ANIMAL INDUSTRY EQUIPMENT POLE BARN 24x120
Location Code = **37Equibarn**

(1st & 2nd Positions): **37** = Leon County
(3rd thru 10th Positions): **Equibarn** = Agency defined location identifier

Configuration Field Details

Agencies must provide the following Location Definition related configuration values as listed in the *<Agency> Location Definition* worksheet in Smartsheet.

Table 2: Location Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Configure Value	Configure Value: "Yes", "No", "Updated", "New"	Required for Smartsheet	Character	7	Agency Indicated
Error Details	Errors generated by Florida PALM initial configuration	Required	Alpha-Numeric	254	Project Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
	attempt using Agency provided data.				
Solution	Guidance to resolve Error Details.	Required	Alpha-Numeric	254	Project Provided
Set ID	Value used in Florida PALM to define setup data. It allows the sharing of common setup data across Business Units or specific to Business Unit.	Required	Alpha-numeric	5	Project Provided
Florida PALM Location Code	Florida PALM agency provided 10-character agency specific location identifier.	Required	Alpha-numeric	10	Agency Provided
Effective Date	Prior to system implementation, this date is defaulted to 01/01/1901. Following system implementation, this field will reflect the date when a row becomes effective, or the date that an action begins.	Required	Date	10	Project Provided
Status as of Effective Date	Status as of Effective Date: "(A)ctive", "(I)nactive". *Prior to system implementation this status is defaulted to "(A)ctive" for all agency confirmed values.*	Required	Character	1	Project Provided
Description	Location Description.	Required	Character	30	Agency Provided
Country	Country Abbreviation. (Example: USA)	Required	Character	3	Agency Provided
Phone	Agency Phone Number Associated with Location.	Optional	Character	24	Agency Provided
Address 1	Street Address of Asset Location OR Street Address or P.O. Box of Agency Primary Location	Optional	Character	55	Agency Provided
Address 2	Building Name at Location Address.	Optional	Character	55	Agency Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Address 3	Additional address details, if applicable.	Optional	Character	55	Agency Provided
City	City or Town of Location Address.	Optional	Character	30	Agency Provided
County	County of Location Address.	Optional	Character	30	Agency Provided
State	State of Location Address.	Optional	Character	6	Agency Provided
Postal	Postal Code of Location Address.	Optional	Character	12	Agency Provided
Jurisdiction	User Defined Field.	Optional	Character	5	Agency Provided
Building Number	Building Number occupied by Agency at the Location Address, if applicable.	Optional	Character	10	Agency Provided
Floor/Room Number	Floor/Room within the location, if applicable.	Optional	Character	10	Agency Provided
Sector	Agency District/Area, if applicable.	Optional	Character	10	Agency Provided
Comments	Agency comments.	Optional for Smartsheet	Character	254	Agency Provided

Configuration Page(s)

The following provides an example of the Location Definition configuration page.

Figure 2: Location Definition Configuration Page Example

The following provides an example of the Location Definition as used by the Asset Module component in Florida PALM.

Figure 3: Use of Location Definition Configuration Value on an Asset Transaction Page

Worksheet Instructions

The below information provides detailed column instructions on how to complete the *<Agency> Location Definition* worksheet in Smartsheet.

Task Completion Requirement: For this task (RW Task 567-G) to be considered complete, it is necessary that you follow all steps listed below to ensure you have filled in or selected the appropriate values.

RW Task 513 required the initial submission of Location values for configuration. These values have been configured and are being included in the worksheet for use to complete RW Task 567-G. A list of errors and solutions have been provided for Locations that could not be uploaded into Florida PALM.

Review each Florida PALM Location code provided.

1. If errors were identified, they will be listed in the Error Details column with a recommended action to resolve that error listed in the Solution column. Review list of errors with their recommended solutions and make the necessary updates. In the Configure Value column, select 'Updated' once the errors have been addressed.

NOTE: Florida PALM requires each Location Code to be unique. Addition of a different description and/or address to an existing Location Code is considered a duplicate Location Code and will not be configured in Florida PALM.

NOTE: A detailed explanation of all errors can be found in Table 6 in the appendix.

2. If no errors where identified, review the provided locations from RW Task 513.
   a. In the Configure Value column select:
      i. "Yes" if you still need this location.
      ii. "No" if you no longer need this location.
      iii. "Update" if any updates are needed for this location. Update the appropriate columns.
3. If a new location needs to be provided:
   a. Select "New" in the Configure Value column.
   b. Specify a 10-character value in the Florida PALM Location Code column, using the county code as the first two characters (See Table 7 in the appendix).
   c. Specify the following address details, as necessary, in the following columns:
      i. Description
      ii. Country
      iii. Phone (optional)
      iv. Address 1
      v. City
      vi. County
      vii. State
      viii. Postal
4. Enter additional address details in the following columns:
   a. Address 2 – Provide the building name associated with the location, occupied by your agency, that needs to be configured in Florida PALM.
   b. Address 3 – Additional optional address details, if needed.
   c. Floor/Room Number – Provide the optional Floor/Room number of buildings occupied by your agency that need to be configured in Florida PALM. Additional floor or room information can also be added via the Area ID field, described in the next section.
   d. Jurisdiction/Building Number/Sector – Provide the optional jurisdiction, building number, and/or sector to further define asset locations if such designation(s) meet the needs of your agency.

Figure 4: Location Definition Worksheet Required Columns (if applicable)

Area ID

Figure 5: Area ID Values Worksheet in Smartsheet

NOTE: *This worksheet should be completed after the Asset Management (AM) Location Definition Worksheet, due to the data-related dependencies.*

Configuration Value Definition

An Area ID provides an opportunity to identify specific areas within an established location. This function can be used to identify multiple rooms or floors within a single location, or any other granular sub-division of the agency location. The system provides a 10-character (alphanumeric) field to populate an Area ID. Once the address and location code are created in Florida PALM, the floor, or floor and room number can be added to the Area ID field. Numerous lines can be added to reflect multiple floors or multiple floor / room combinations.

NOTE: *This is an optional feature that can be exercised by agencies and the values provided are for configuration in Florida PALM.*

Business Process and Subprocess

The Area ID configuration supports the following business process and subprocess:

Table 3: Area ID Business Process and Subprocess

Business Process	Business Subprocess
40.3 Set up and Maintain Asset Controls	N/A

Configuration Value Purpose and Use

- Area ID is an optional field. This field can be used to identify multiple rooms or floors within a single agency location.
- If Area ID is not provided, Florida PALM cannot associate rooms or floors with converted asset records.

Configuration Design Details

The following values must be provided by the agency when establishing an Area ID:

- Florida PALM Location Code: 10-character (alphanumeric) Florida PALM agency specific location identifier.
- Area ID: 10-character (alphanumeric) user defined field – value that will be displayed for the Area ID.
- Description: 30-character (alphanumeric) Area ID Description.
- Area Detail: 2GB (limited to 254 in Smartsheet cells) character detailed information field for the Area ID.

Example:

Agency: Department of Health
Location: Alachua Regional Service Center East
Location Code = **01RegionaE**

Table 4: Area ID Example

Location Code	Area ID	Description	Area Detail
01RegionaE	Fl 3 Rm 12	Floor 3 Room 12	Office administrator storage area
01RegionaE	Fl 3 Rm 14	Floor 3 Room 14	
01RegionaE	Floor 2	Second Floor	
01RegionaE	Fl 2 Rm 16	Floor 2 Room 16	Director's office

Configuration Field Details

Agencies have the option to provide the following Area ID related configuration values as listed in the *<Agency> Area ID Values* worksheet in Smartsheet. Please note, the following information is only required if agencies choose to configure Area ID(s):

Table 5: Area ID Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Configure Value	Configuration Needed: "Yes", "No", "Updated", "New". *Area ID is an optional agency configuration.*	Required for Smartsheet	Character	7	Agency Indicated
Error Details	Errors generated by Florida PALM initial configuration attempt using Agency provided data.	Required	Alpha-numeric	254	Project Provided
Solution	Guidance to resolve Error Details.	Required	Alpha-numeric	254	Project Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Florida PALM Location Code	Florida PALM system provided 10-character (alphanumeric) agency specific location identifier. *This must be a Location Code value already established in the <Agency> Location Definition worksheet.*	Required	Alpha-numeric	10	Agency Indicated
Area ID	Florida PALM location specific area identifier. This is a user defined field that is associated to a specific Location Code.	Required	Alpha-numeric	10	Agency Provided
Description	Area ID Description.	Required	Character	30	Agency Provided
Area Detail	Detailed information field for the Area ID.	Optional	Character	254	Agency Provided
Comments	Agency comments.	Optional for Smartsheet	Character	254	Agency Provided

Configuration Page(s)

The following provides an example of the Area Definition configuration page

Figure 6: Area Definition Configuration Page Example

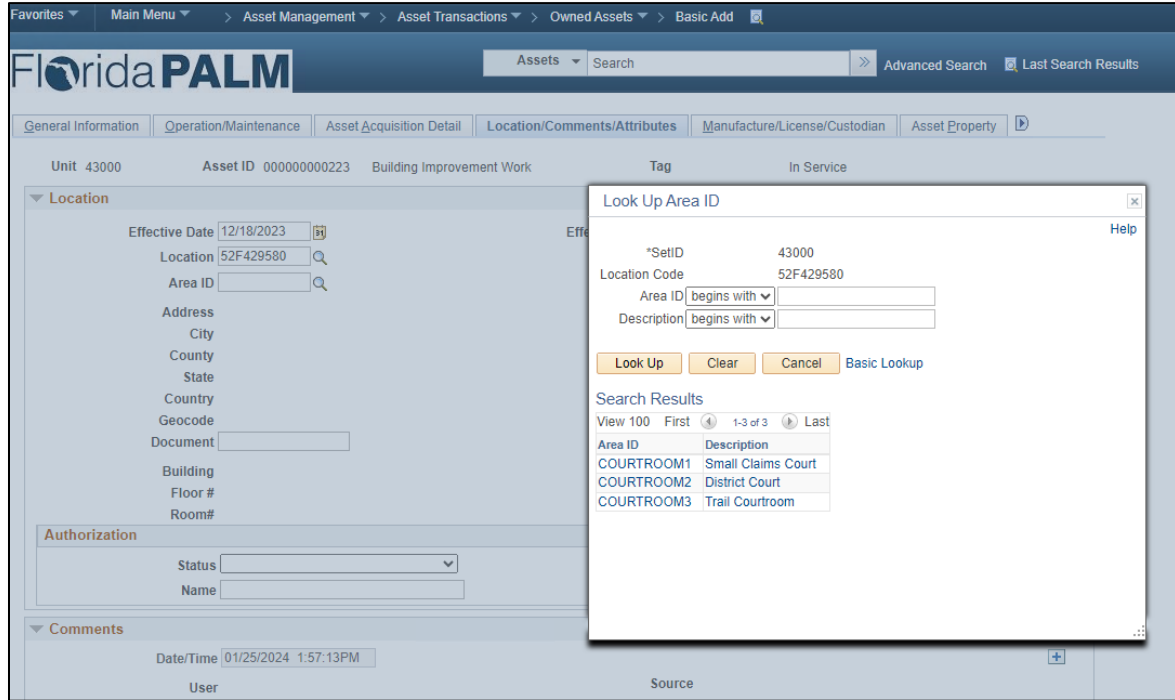The following provides an example of the Area ID as used by the Asset Module component in Florida PALM.

Figure 7: Use of Area Definition Configuration Value on an Asset Transaction Page

Worksheet Instructions

The below information provides detailed column instructions on how to complete the *<Agency> Area ID Values* worksheet in Smartsheet.

Task Completion Requirement: For this task (RW Task 567-G) to be considered complete, it is necessary that you follow all steps listed below to ensure you have filled in or selected the appropriate values.

RW Task 513 requested the initial submission of Area ID values for configuration. These values have been configured and are being included in the worksheet for use to complete RW Task 567. A list of errors and solutions have been provided for Area ID's that could not be uploaded into Florida PALM.,

Review each Area ID provided.

1. If errors where identified, they will be listed in the Error Details column with a recommended action to resolve that error listed in the Solution column. Review list of errors with their recommended solutions and make the necessary updates. In the Configure Value column, select 'Updated' once the errors have been addressed.

NOTE: *Florida PALM requires each Area ID to be unique per Location. If an associated Location Code was updated, the Location code also needs to be updated in the Area ID Values worksheet.*

NOTE: *A detailed explanation of all errors can be found in Table 6 in the appendix.*

2. If no errors where identified, review the provided locations from RW Task 513.
   a. In the Configure Value column select:
      i. "Yes" if you still need this Area ID
      ii. "No" if you no longer need this Area ID
      iii. "Update" if any updates are needed for this location. Update the appropriate columns.
3. If a new additional location needs to be provided:
   a. Select "New" in the Configure Value column
   b. Provide the Area ID that you would like to create. This is a 10-character agency defined field which will be available for selection when setting the location of an asset. Examples include:
      i. LUNCHROOM
      ii. OFFICE104
      iii. COURTROOM1
4. Complete the following in the Description column for each Area ID:
   a. Provide the Description of the Area ID and Area Detail information (e.g., Rooms, floors), if applicable. Examples include:
      i. Employee lunchroom
      ii. Office #104
      iii. Small Claims Court

Optionally, you may also provide a more detailed description of the Area in the Area Detail field.

Figure 9: Area ID Values Worksheet Required Columns (if applicable)

Appendix

Table 6: Error Details

Error Name	Details
ERROR - Duplicate: A location has already been loaded with this Location Code value	Duplicate Location Code values cannot be loaded. Agencies will need to have distinct Location Codes, only one row is allowed per value in the 'Location Code' column. Agencies need to create different Location Code values or utilize Area ID to suit their needs.
ERROR - Invalid value: Cannot have a value of 'N/A' in the State column	The State column needs to be blank or a valid state value if provided.
ERROR - The Location Code is too long for the field (Max length 10)	The Location Code needs to be updated to a valid value within the character limit.
ERROR - Description is a required value	The Description column needs to be populated in order to load an Area ID value.
ERROR - Duplicate: An Area ID has already been loaded with this Area ID value	Duplicate Area ID values cannot be loaded. Agencies will need to have distinct Area IDs per Location, only one row is allowed per value in the 'Area ID' column.
NEED ACTION - The Location Code for this Area ID does not exist	This Area ID row was successfully loaded into the system. However, analysis showed that the value in the 'Location Code' column is not a value that has been created in the LOCATION DETAIL tab. As a solution, the agency will need to create a row for this location code in the LOCATION DETAIL tab, or they will need to associate that Area ID to a different location code which exists.

Table 7 provides a list of all Florida county codes.

Table 7: Florida County Codes

Code	County	Code	County
01	Alachua	35	Lake
02	Baker	36	Lee
03	Bay	37	Leon
04	Bradford	38	Levy
05	Brevard	39	Liberty
06	Broward	40	Madison
07	Calhoun	41	Manatee
08	Charlotte	42	Marion
09	Citrus	43	Martin
10	Clay	44	Monroe
11	Collier	45	Nassau
12	Columbia	46	Okaloosa
13	Miami-Dade	47	Okeechobee
14	Desoto	48	Orange
15	Dixie	49	Osceola
16	Duval	50	Palm Beach
17	Escambia	51	Pasco
18	Flagler	52	Pinellas
19	Franklin	53	Polk
20	Gadsden	54	Putnam
21	Gilchrist	55	St. Johns
22	Glades	56	St. Lucie
23	Gulf	57	Santa Rosa
24	Hamilton	58	Sarasota
25	Hardee	59	Seminole
26	Hendry	60	Sumter
27	Hernando	61	Suwanee
28	Highlands	62	Taylor
29	Hillsborough	63	Union
30	Holmes	64	Volusia
31	Indian River	65	Wakulla
32	Jackson	66	Walton
33	Jefferson	67	Washington
34	Lafayette		