

Overview

The [PCC001 – Projects \(for accounting purposes\) Conversion](#) will provide agencies with the ability to migrate project information currently in FLAIR to Florida PALM. This conversion will consume nonfinancial data pertaining to projects and insert the data into the Florida PALM Project Costing records.

Use the information in this supplemental as a resource for completing Readiness Workplan (RW) subtask 545-B which requires agencies to complete the PCC001 Conversion Workbook. This supplemental describes the specific workbook added to the new Conversion Workbook Inventory folder located in your agency-specific folder in the Florida PALM Secure File Share portal in SharePoint.

Table 1 provides information about the conversion worksheet for RW Task 545-B which allows you to provide required Projects-related values.

Table 1: Segment IV Conversion Workbook

Conversion	Description	Primary Source Systems
PCC001 – Projects (for accounting purposes)	Conversion of titling and administrative information required to manage active projects that are authorized for continued use. <i>Determination of validity of active Project values from FLAIR (i.e., Conversion “yes” or “no”) and supplemental data values for Project record are required from agencies.</i>	FLAIR

As you complete the required workbook, this supplemental will guide your agency through a process of providing the correct values that will be converted for your agency for use in Florida PALM.

This workbook is being shared as an excel worksheet in the Secure File Share portal in SharePoint because of the large volume of data for some agencies.

NOTE: *The following agencies do not have active Project records in FLAIR today and therefore a conversion workbook has not been provided: AHCA, Citrus, DOL, FCOR, FGCC, PSC.*

NOTE: *The converted values, including the information provided by your agency, will be loaded as part of Mock 1 conversion activities and the results of the load will be provided back to your agency for review, analysis, and future data readiness. We anticipate providing the results during September.*

Projects (PCC001) Conversion

This workbook represents a core conversion for Florida PALM. Column/field definitions and instructions are provided below.

SharePoint Navigation:

Florida PALM Secure File Share Portal > (Agency) Folder > Conversion Workbook Inventory > PCC001 - Projects

Projects Conversion

Convert Value	PC Business Unit	Project	Project Description	Project Type	Project Start Date	Project End Date
Convert Value: Yes or No - Required Field - Field Type: Character - Field Length: 3	Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields. - Required Field - Field Type: Character - Field Length: 5	Represents the Project ChartField which is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked. - Required Field - Field Type: Character - Field Length: 15	Briefly defines the project's purpose. This field is also used as the Project's Title. - Required Field - Field Type: Character - Field Length: 30	Identifier of the type of project. - Required Field - Field Type: Character - Field Length: 5	Represents the project start date. The start date has to be before or equal to Project's Activity Start Date. Project Start Date should be before the Project End Date. *Must be in MM/DD/YYYY format - Required Field - Field Type: Date - Field Length: 10	Represents the date that the project ends. The end date has to be greater than or equal to Project's Activity End Date. *Must be in MM/DD/YYYY format - Required Field - Field Type: Date - Field Length: 10

Figure 1: Projects Conversion ChartFields Worksheet

Conversion Value Definition

Convert nonfinancial data pertaining to projects into the Florida PALM Project Costing module.

Business Process and Subprocess

The PCC001 Projects conversion can be found in the following business process and subprocesses:

Table 2: Projects Business Process and Subprocess

Business Process	Business Subprocess
90.1 Create and Maintain Projects	90.1.1 Add and Modify Project
	90.1.2 Add or Modify PC Activity

Conversion Value Purpose and Use

The conversion values are imperative for the transition from FLAIR to the Florida PALM operational system for projects. Agencies must provide the values for **Project Type, Project Start Date, and Project End Date** fields.

Failure to establish Project Type, Project Start Date, and Project End Date values will result in:

- Project values not being converted into Florida PALM for go-live; or
- Information being converted that is incorrect or that needs to be updated

Assumptions

The following assumptions are considered when defining converted projects:

- Converted projects must be active with a Status Code of "A" within FLAIR
- All new projects needed for conversion into Florida PALM must be added to FLAIR as Project ID

Conversion Field Details

Agencies must verify or provide the projects conversion values as listed in the <Agency> PCC001 - Projects Conversion workbook in the Secure File Share portal on Florida PALM SharePoint. The

list includes all current, active project values from FLAIR for your agency but require the three additional fields of information to be specified or provided by your agency.

Table 3 below provides:

- A list of the field names included in the conversion worksheet.
- Field descriptions.
- Indication if the field is required or optional in Florida PALM and within the worksheet.
- Field type and field length.
- Indication if the field value input is provided by the Project or if the agency needs to provide a response or information.

Valid Field Types include:

- Character – The field can include numbers, letters, spaces, or symbols.
- Date – The field must contain an 8-digit date (i.e., MM/DD/YYYY).

Valid Field Value Inputs include:

- Agency Indicated – Select “yes” or “no” in this field.
- Agency Provided – Provide (required or optional) information in this field, in accordance with the field type and field length requirements.
- Agency Specified – Select from the available drop-down values.
- Project Provided – Information is provided in the field. Some are locked (i.e., not editable) and some are unlocked (i.e., available for edit).

NOTE: Within the worksheet, for any field where information is provided by the agency and the provided information exceeds the allowable length, the cell will turn red, indicating that the value entered is too long and must be adjusted.

NOTE: Within the worksheet, for any field which requires agency input, even those with other field selection dependencies, the cell will turn yellow while empty, indicating that action must be taken by the agency.

Table 3: Project ChartFields Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Convert Value	Convert Value: “Yes” or “No”.	Required	Character	3	Agency Indicated
PC Business Unit	Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields.	Required	Character	5	Project Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Project	Represents the Project ChartField which is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked.	Required	Character	15	Project Provided
Project Description	Briefly defines the project's purpose. This field is also used as the Project's Title.	Required	Character	30	Project Provided
Project Type	Identifier of the type of project.	Required	Character	5	Agency Specified
Project Start Date	Represents the project start date. The start date has to be before or equal to Project's Activity Start Date. Project Start Date should be before the Project End Date.	Required	Date	10	Agency Provided
Project End Date	Represents the date that the project ends. The end date has to be greater than or equal to Project's Activity End Date.	Required	Date	10	Agency Provided

Table 4 provides the available Project Type values and descriptions.

Table 4: Project Types

Project Types	Description
FCO	Fixed Capital Outlay
GRANT	Grant
OPER	Operating
IT	Information Technology
ADMIN	Administrative
EDUC	Education
CMNTY	Community

Project Costing Screens

The following provides an example of the page(s) where the agency defined project values will be in Florida PALM.

The screenshot shows the 'General Information' section of the Florida PALM Project page. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are three input fields: '*Business Unit' with the value '43000', '*Project' with the value '43PC2024EGrant', and '*Create' with a dropdown menu showing 'Blank Project'. An orange 'Add' button is positioned below the fields. At the bottom of the section, there are links for 'Find an Existing Value' and 'Add a New Value'.

Figure 2: Project Page in Florida PALM

The screenshot displays the full Florida PALM Project page for project 43PC2024EGRANT. The top navigation bar includes the Florida PALM logo, a search bar, and links for 'Advanced Search' and 'Last Search Results'. Below the navigation are several tabs: 'General Information', 'Project Costing Definition', 'Primavera', 'Program Management', 'Manager', 'Location', 'Phases', 'Approval', 'Justification', 'User Fields', and 'Rates'. The 'General Information' tab is active, showing the project name '43PC2024EGRANT' and an 'Add to My Projects' button. The main form area contains several fields: '*Description' (E Grant Implementation), '*Integration' (43000), 'Project Type' (GRANT), and 'Percent Complete' (0.00). There are also checkboxes for 'Program' and 'Grant Project', and a 'Processing Status' dropdown set to 'Pending'. Below this is a 'Project Schedule' section with '*Start Date' (07/02/2024) and '*End Date' (07/02/2024). The bottom section is titled 'Description' and shows a 'Date/Time Stamp' (07/02/24 9:57:31AM) and 'User ID' (DAWNA.JOHNSON). It includes a 'Description' text area and a 'Long Description' text area, with a note that 254 characters remain.

Figure 3: Project Page in Florida PALM

Worksheet Instructions

The below information provides detailed instructions on how to complete the <Agency> PCC001 - Projects Conversion workbook.

Task Completion Requirement: For this task (RW Subtask 545-B) 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.

For each Project listed:

1. Review the list and indicate whether the existing values should be included or not included in Florida PALM. A *Convert Value* column is provided to capture your agency's determination of the final disposition of an existing Project value. Indicate "Yes" or "No", as appropriate.
2. For all values that are indicated with a "Yes" to convert, you will need to:
 - a. Select a Project Type from the provided values in the Project Type column.
 - b. Provide a 6-character date value in the Project Start Date Column.
 - c. Provide a 6-character date value in the Project End Date Column.
3. Add Comments *optionally* for your internal purposes.

Convert Value	PC Business Unit	Project	Project Description	Project Type	Project Start Date	Project End Date
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Figure 4: PCC001 – Projects Conversion Worksheet Required Columns

NOTE: If it is determined that your agency will need to add a new Project that is not listed, you must first add the Project ID in FLAIR and will be asked to provide the additional values needed for Florida PALM conversion in a future RW task. If new Project IDs are not added in FLAIR before final conversion, the Project ID's will not be converted to Projects in Florida PALM.