

## 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 non-financial data pertaining to projects and insert the data into the Florida PALM Project Costing records.

Use the information in this supplemental document as a resource for completing Readiness Workplan (RW) subtask 555-A, which requires agencies to provide additional projects information required for conversion by updating the PCC001 Conversion Workbook based on Mock Conversion 1 results. This supplemental describes the <Agency> PCC001 – Projects Conversion Workbook located in your agency-specific folder in the Florida PALM Secure File Share portal in SharePoint.

As you complete the required workbook, this supplemental document 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 and therefore a conversion workbook has not been provided: AHCA, Citrus, DBPR, COM, DOAH, DOL, DOR, FCOR, LEG, JAC, PSC.

**NOTE:** The information provided by your agency in this workbook will be loaded for Mock Conversion 2 and the results will be provided back to your agency for review, analysis, and future data readiness during RW Task 571.

## 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 > Mock 1 > PCC001 - Projects

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	New Project Start Date	Project End Date	New Project End Date	Comments
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	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - 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 MMDDYYYY format - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Start Date is missing or incorrect. *Must be in MMDDYYYY format - Required Field (based on prior column dependency) - 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 MMDDYYYY format - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. *Must be in MMDDYYYY format - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

Figure 1: Projects Conversion Errors ChartFields Worksheet

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	Project End Date	New Project End Date	Comments
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	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - 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 MMDDYYYY 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 MMDDYYYY format - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. *Must be in MMDDYYYY format - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

Figure 2: Projects Successful Conversion ChartFields Worksheet

### Conversion Value Definition

Convert non-financial 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 1: Projects Business Process and Subprocess*

Business Process	Business Subprocess
<a href="#">90.1 Create and Maintain Projects</a>	<a href="#">90.1.1 Add and Modify Project</a>
	<a href="#">90.1.2 Add or Modify PC Activity</a>

### Conversion Value Purpose and Use

The conversion values are imperative for the transition from FLAIR to the Florida PALM for Projects. This workbook contains agency Project records. Agencies must provide values for **Project Type, Project Start Date, and Project End Date** fields if the cell contains no data.

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

- Project records 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 will review Projects records that successfully loaded in Florida PALM during Mock Conversion 1. Table 2 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)

Table 2: Project ChartFields Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
<b>Convert Value</b>	Convert Value: “Yes” or “No”.	Required	Character	3	Agency Indicated
<b>PC Business Unit</b>	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
<b>Project</b>	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
<b>Project Description</b>	Briefly defines the Project's purpose. This field is also used as the Project's Title.	Required	Character	30	Project Provided
<b>Project Type</b>	Identifier of the type of Project.	Required	Character	5	Project Provided
<b>New Project Type</b>	Value is required to be entered here if the response in the Convert Value column is “Yes” and the value in the Project Type column is missing or incorrect.	Required or Optional (Based on prior column dependency)	Character	5	Agency Specified

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
<b>Project Start Date</b>	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	Project Provided
<b>New Project Start Date</b>	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Start Date is missing or incorrect.	Required or Optional (Based on prior column dependency)  <i>*This column is only available in the Conversion Errors Tab</i>	Date	10	Agency Provided
<b>Project End Date</b>	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	Project Provided
<b>New Project End Date</b>	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect.	Required or Optional (Based on prior column dependency)	Date	10	Agency Provided
<b>Comments</b>	Agency comments	Optional	Character	254	Agency Provided

Table 3 provides a list of the available Project Type values and descriptions.

Table 3: Project Types

Project Types	Description
<b>FCO</b>	Fixed Capital Outlay
<b>GRANT</b>	Grant
<b>OPER</b>	Operating
<b>IT</b>	Information Technology

Project Types	Description
<b>ADMIN</b>	Administrative
<b>EDUC</b>	Education
<b>CMNTY</b>	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 interface. It features two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are input fields for:
 

- \*Business Unit: 43000
- \*Project: 43PC2024EGrant
- \*Create: Blank Project (dropdown menu)

 An 'Add' button is located below the input fields. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Figure 2: Project Page in Florida PALM

The screenshot displays the project details 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 tabs for 'General Information', 'Project Costing Definition', 'Primavera', 'Program Management', 'Manager', 'Location', 'Phases', 'Approval', 'Justification', 'User Fields', and 'Rates'. The main content area shows:
 

- Project: 43PC2024EGRANT with an 'Add to My Projects' button.
- \*Description: E Grant Implementation
- \*Integration: 43000 (Dept of Financial Services)
- Project Type: GRANT (Grant Project)
- Percent Complete: 0.00
- Processing Status: Pending
- Project Status: P (Proposed)

 A 'Project Schedule' section shows \*Start Date: 07/02/2024 and \*End Date: 07/02/2024. The 'Description' section includes a 'Date/Time Stamp' (07/02/24 9:57:31AM), 'User ID' (DAWNA.JOHNSON), and two text input fields for 'Description' and 'Long Description'. A character count indicates '254 characters remaining'.

Figure 3: Project Page in Florida PALM

### Workbook 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 555-A) 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.

### Successful Conversions Tab

For each Project listed:

1. Review the list of successful Project conversions.
2. If necessary,
  - a. Update the *Convert Value* column to “No” if your agency no longer needs to convert the Project.
  - b. Update the Project Type from the provided values in the *New Project Type* column.
  - c. Update the 6-character date value in the *New Project End Date* column.
3. Add comments *optionally* for your internal purposes.

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	Project End Date	New Project End Date	Comments
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 or 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	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - 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	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. *Must be in MM/DD/YYYY format - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

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 Projects are not added in FLAIR before final conversion, the Project will not be converted to the Projects Costing module in Florida PALM.

### Conversion Errors Tab

For each Project listed:

1. Review the Project records that received an error during Mock Conversion 1.
2. Compare the errors in the worksheet to those identified in the <Agency> PCC001 Error File.
  - a. Sort by Project ID to find the corresponding error.
  - b. For each Project ID, review the Error Message in the <Agency> PCC001 Error File and make the required updates in the <Agency> Projects – PCC001 Conversion Workbook.

No. of Total Errors	: 639
<Error Type>,<Record Type>,<Line Nbr>,<Business Unit>,<Project Id>,<Field Name>,<Field Value>,<Error Message>,<End Indicator>	
E,H, 001, 12345, 12345678912,	START_DT, 2024-07-24, Start Date is after End Date for Project in the file uploaded, Z
E,H, 012, 12345, 14582697412,	START_DT, 2023-03-07, Start Date is after End Date for Project in the file uploaded, Z
E,H, 015, 12345, 15742698351,	START_DT, 2024-05-20, Start Date is after End Date for Project in the file uploaded, Z
E,H, 105, 12345, 15863958742,	START_DT, 2024-05-17, Start Date is after End Date for Project in the file uploaded, Z

Figure 5: PCC001 Error File

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	New Project Start Date	Project End Date	New Project End Date	Comments
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 CharFields.	Represents the Project CharField 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.	Briefly defines the projects purpose. This field is also used as the Projects Title.	Identifier of the type of project. - Required Field - Field Type: Character - Field Length: 5	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Character - Field Length: 5	Represents the project start date. The start date has to be before or equal to Projects Activity Start Date. Project Start Date should be before the Project End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Start Date is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Represents the date that the project ends. The end date has to be greater than or equal to Projects Activity End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

Figure 6: PCC001 Workbook – Conversion Errors Tab

3. Depending on the type of error:
  - a. Select a Project Type from the provided values in the *New Project Type* column.
  - b. Provide or update a 6-character date value in the *New Project Start Date* column.
  - c. Provide or update a 6-character date value in the *New Project End Date* column.

No. of Total Errors	: 639
<Error Type>,<Record Type>,<Line Nbr>,<Business Unit>,<Project Id>,<Field Name>,<Field Value>,<Error Message>,<End Indicator>	
E,H, 001, 12345, 12345678912,	START_DT, 2024-07-14, Start Date is after End Date for Project in the file uploaded, Z
E,H, 012, 12345, 14582697412,	START_DT, 2023-03-07, Start Date is after End Date for Project in the file uploaded, Z
E,H, 015, 12345, 15742698351,	START_DT, 2024-05-20, Start Date is after End Date for Project in the file uploaded, Z
E,H, 105, 12345, 15863958742,	START_DT, 2024-05-17, Start Date is after End Date for Project in the file uploaded, Z

Figure 7: PCC001 Error File

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	New Project Start Date	Project End Date	New Project End Date	Comments
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 CharFields.	Represents the Project CharField 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.	Briefly defines the projects purpose. This field is also used as the Projects Title.	Identifier of the type of project. - Required Field - Field Type: Character - Field Length: 5	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Character - Field Length: 5	Represents the project start date. The start date has to be before or equal to Projects Activity Start Date. Project Start Date should be before the Project End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Start Date is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Represents the date that the project ends. The end date has to be greater than or equal to Projects Activity End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

Figure 8: PCC001 Workbook – Conversion Errors Tab

4. Update Convert Value column, if necessary.

Convert Value	PC Business Unit	Project	Project Description	Project Type	New Project Type	Project Start Date	New Project Start Date	Project End Date	New Project End Date	Comments
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 CharFields.	Represents the Project CharField 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.	Briefly defines the projects purpose. This field is also used as the Projects Title.	Identifier of the type of project. - Required Field - Field Type: Character - Field Length: 5	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Type column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Character - Field Length: 5	Represents the project start date. The start date has to be before or equal to Projects Activity Start Date. Project Start Date should be before the Project End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project Start Date is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Represents the date that the project ends. The end date has to be greater than or equal to Projects Activity End Date. - Required Field - Field Type: Date - Field Length: 10	Value is required to be entered here if the response in the Convert Value column is "Yes" and the value in the Project End Date column is missing or incorrect. - Required Field (based on prior column dependency) - Field Type: Date - Field Length: 10	Agency comments. - Optional Field - Field Type: Character - Field Length: 254

Figure 9: PCC001 Workbook – Conversion Errors Tab

5. Add Comments *optionally* for your internal purposes.

***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.

***NOTE:*** It is recommended that you update Project Type, Project Start Date, and Project End Date in FLAIR as well to reduce data errors during Mock Conversions.