Florida PALM
Planning, Accounting, and Ledger Management

Department of Financial Services
*Task 555-A – Complete Data Cleansing
Based on Mock Conversion 1 – Projects
(PCC001)*

Task Instructions

Task ID: 555-A
Task Name: *Complete Data Cleansing Based on Mock Conversion 1 – Projects (PCC001)*
Task Start Date: *October 7, 2024*
Task Due Date: *November 22, 2024*
Project Impact: *Direct*

Task Description

Review Mock Conversion 1 results and perform data cleansing activities to prepare data for Mock Conversion 2.

555-A: Review the Conversion Approach to prepare for Mock Conversion activities. Review Mock Conversion 1 results for Projects - (PCC001), perform data cleansing and provide agency-specific conversion values.

Task Overview

As described in the Agency Data Readiness Guidance document, agencies are responsible for evaluating and managing their data to ensure agency data readiness for conversion activities. This includes agency managed data in FLAIR and enterprise systems. You have prepared for conversion activities through a series of previous RW Tasks (514, 517, 526, 529, 542, and 545) requiring you to:

- Understand the planned conversions for Florida PALM;
- Identify which conversions are needed for your agency (i.e., some agencies do not have active customers or projects that need to be converted);
- Analyze your related data and develop an agency-specific Data Readiness Plan; and
- Perform data cleansing of the identified data groups to prepare for conversion activities (e.g., remove or inactivate all unnecessary information).

The Project is performing tests with agency data to see if it can be successfully converted into Florida PALM. This process is called Mock Conversion. The Conversion Approach describes how the Project will complete multiple cycles of Mock Conversion activities where agency data will be **extracted** from source enterprise systems (e.g., FLAIR and People First), **transformed** from the legacy data structure to the Florida PALM data structure, and **loaded** to Florida PALM.
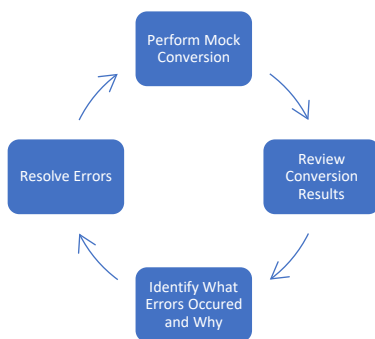

Figure 1: Mock Conversion Cycle

With each cycle of Mock Conversion, the Project will provide you with the results of the conversions for your agency through a series of related RW Tasks (RW Tasks 555, 571, 587, 597). You must review your agency's result to understand the data that is being converted and the errors that occurred during the conversion, if any. This is your opportunity to perform additional data cleansing in the source systems to improve the success rate of the data load results for the next Mock Conversion cycle and ultimately for the final conversion at go-live in January 2026.

This task has been split into two manageable subtasks as described in the table below.

Table 1: Subtask Overview

Subtask	Subtask Overview	Planned Dates
555-A	Review the Conversion Approach to prepare for Mock Conversion activities. Review Mock Conversion 1 results for Projects - (PCC001), perform data cleansing and provide agency-specific conversion values.	Oct. 7, 2024 – Nov. 22, 2024
555-B	Review Mock Conversion 1 results for AMC001, CTC001, GMC001, POC001, and PCC002 and perform data cleansing activities to prepare data for Mock Conversion 2.	Oct. 28, 2024 – Nov. 22, 2024

Task Elements

This task contains four parts:

1. Review the Conversion Approach to develop an understanding of conversion activities.
2. Review the Mock Conversion 1 results for PCC001, if applicable.
3. Perform data cleansing and provide projects data needed for PCC001 for Mock Conversion 2, if applicable.
4. Report data readiness progress in Smartsheet.

NOTE: *Items number two and three are only applicable for agencies with Project values in FLAIR and therefore, have values to convert to Florida PALM.*

Review the Florida PALM Conversion Approach

Review the Conversion Approach to develop an understanding of the data that is planned to be converted to Florida PALM and the Mock Conversion activities that will be performed to test and validate the conversions. As described in the Conversion Approach, Mock Conversion is a shared responsibility of the Project and agencies. The Project is responsible for performing conversions, specifically extracting agency legacy data from source systems, transforming that data, and loading it in Florida PALM. The Project will collaborate with source system owners (e.g., Department of Financial Services and People First) to obtain the necessary data for conversion. Agencies are responsible for ensuring their data is ready for conversion.

Based on your understanding of Conversion activities, consider the following for your agency:

- *Who are my primary subject matter experts that understand my agency data sets and can lead the effort in reviewing conversion results and performing data cleansing?*
- *Are there known issues with current data that need to be addressed?*
- *Are there data cleansing efforts for certain data groups that should be prioritized?*
- *What are the risks to my agency if our data is not ready to be converted?*
- *What are my agency mitigation strategies if our data is not ready to be converted?*
- *Are there updates needed to my Data Readiness Plan?*

Review Mock Conversion 1 Results for PCC001

The Project has completed Mock Conversion 1 for PCC001 – Projects (for Accounting Purposes). The data used for Mock Conversion 1 was as of September 7, 2024. This conversion was

completed using your current Projects data in FLAIR and the data you previously provided in your agency's *Projects - PCC001 Conversion Workbook* (Task 545-B).

NOTE: *The following agencies have active Projects in FLAIR and were included in the PCC001 run of Mock Conversion 1: APD, DACS, DCF, DEP, DFS, DJJ, DLA, DMA, DMS, DOE, DOEA, DOH, DOS, DVA, EOG/DEM, FDC, FDLE, FDOT, FLHSMV, FSDB, FWC, LEG, SCS.*

Four documents detailing the conversion results have been added to your Florida PALM Secure File Share Portal in the Conversion Workbook Inventory folder, Mock 1 folder, PCC001 – Projects folder.

1. ***<Agency>* PCC001 Conversion Flat File** generated using your Projects data from FLAIR as well as the Project Type and Project Start and End Dates you previously provided.
   - *Agency action:* Compare the Conversion Flat File to the conversion layout and the conversion data mapping in Knowledge Center to support your understanding of the conversion.
2. ***<Agency>* PCC001 Log File** generated from Florida PALM after your data was transformed and loaded.
   - *Agency action:* Review the log file for summary count of processed and rejected records. This log shows the total number of records extracted from FLAIR, total records successfully processed, and total records with errors.
3. ***<Agency>* PCC001 Error File** generated from Florida PALM after your data was transformed and loaded.
   - *Agency action:* Review the error file to understand your records with errors. The file indicates the record row in the Conversion Flat File and provides the field name that caused the error.
4. ***<Agency>* PCC001 Record Extract** generated from Florida PALM after your data was transformed and loaded.
   - *Agency action:* Review the record extract to view the project records that successfully loaded into Florida PALM. This will help you understand how your data will look in Florida PALM.

Provide Data Needed for PCC001 for Mock Conversion 2

PCC001 requires supplemental data to be provided by agencies. Specifically, you must provide Project Type and Project Start and End Dates for all Projects to be converted from FLAIR. A fifth document has been added to your Florida PALM Secure File Share Portal in the Conversion Workbook Inventory folder, Mock 1 folder, PCC001 – Projects folder that provides a summary of the Mock 1 Conversion results and allows you to provide additional supplemental data, if needed.

<Agency> PCC001 – Projects Conversion Workbook

The PCC001 Conversion Workbook contains two different tabs: Successful Conversions and Conversion Errors.

Successful Conversions Tab

The Projects records that successfully loaded for Mock Conversion 1, as indicated in the PCC001 Report Extract, have been populated in the Successful Conversion Tab of your *<Agency>*

PCC001 – Projects Conversion Workbook. This includes all the Projects that you identified as applicable for conversion and provided the additional required data in previous task 545-B.

Review the data in the Successful Conversions tab to confirm the data is correct. If the data is incorrect, you may make any of the following updates:

- If a Project should not be converted, you may change the pre-populated "Convert Value" status of "Yes" for that project to "No." This will exclude that project from future conversions.
- Project Type and Project End Dates may be updated, if needed.

Review RW Task 555-A Supplemental for detailed instructions on how to update the workbook.

NOTE: *If your agency previously selected 'Yes' to convert a Project, but it is currently Inactive in FLAIR, that Project will not be found in the PCC001 Conversion Workbook.*

NOTE: *Projects will only be converted from FLAIR. If you have additional Projects that should be converted, you must enter them in FLAIR for them to appear in future conversion cycles.*

Conversion Errors Tab

The Projects records that received an error for Mock Conversion 1, as indicated in your PCC001 Error File, have been populated in the Conversion Errors tab of your *<Agency> PCC001 – Projects Conversion Workbook.*

The Project has reviewed all agency PCC001 results for Mock Conversion 1 and determined that there were two different types of errors that occurred.

1. **Missing Data** – Any Projects in FLAIR that were converted without the additional supplemental information needed, specifically the Project Type and Project Start and End Dates, caused an error. This occurred if an agency recently added a new Project to FLAIR or if any agency failed to provide the supplemental data required in previous task 545-B. This was the most common error.
2. **Date Errors** – Any Project that has a Start Date that begins after the End Date received an error. Project Start Dates must occur before the End Date.

Review RW Task 555-A Supplemental for detailed instructions on how to update the workbook.

Report Data Readiness Progress in Smartsheet

A new Smartsheet worksheet, *<Agency> Mock Conversions*, has been created with a summary of your agency's mock conversion results. This worksheet will be used to include all summary data for all conversions for all Mock Conversion cycles. With this worksheet, your agency can get a snapshot of the number of records converted for each conversion and the successful load percentage, as well as provide you with the opportunity to report progress on data cleansing effort.

Figure 3: Demo Mock Conversions Worksheet in Smartsheet

Table 2: <Agency> Mock Conversions Worksheet Columns

Column Name	Column Description	Field Value Input
Conversion Name	Name of the conversion, beginning with the Project-assigned RICEFW ID.	Project Provided
Total Number of Records Received	Number of records received from the source system for the Mock Conversion.	Project Provided
Successful Load Percentage	The percentage of records that successfully loaded for the Mock Conversion. The objective is to have a higher percentage each Mock Conversion cycle.	Project Provided
Data Cleansing Status	Agency reported status of data cleansing per Mock Conversion. Available Drop-Down Options: • <u>Not Applicable</u>: Select this value if the conversion does not apply to your agency. • <u>In Progress</u>: Select this value if your data cleansing efforts have begun. • <u>Complete</u>: Select this value if your data cleansing efforts are complete.	Agency Indicated
Reviewed 10/07/24 Conversion Approach	Agency verification for review of the Florida PALM Conversion Approach. Available Drop-Down Options: • <u>Yes</u>: Select this value if your agency has reviewed the Florida PALM Conversion Approach document.	Agency Indicated

Through the duration of this task, your agency should review your Data Readiness Plan to see how your agency planned for data cleansing and update as needed based upon ongoing data

cleanup efforts. You may also reference the [Agency Data Readiness Guidance](#) for additional information and resources to support your data cleansing activities. For the projects' conversion, document the status of your internal efforts of data-clean up in the Data Cleansing Status column in your *<Agency> Mock Conversion Error Log*.

How will agencies use this information?

Your understanding of and the alignment with the Conversion Approach is critical for successful completion of conversion activities. Agencies must be ready to participate in conversion activities with the Project during each mock conversion. Your agency's business processes and agency business systems benefit from having good, clean data converted to Florida PALM. The Mock Conversion activities provides you with the understanding of your agency's current data readiness status and provides you with an understanding of the data that will be available in Florida PALM at go-live.

What will the Florida PALM Team do with this information?

This task has a direct impact on the Florida PALM Project for mock conversion activities. The updated data you provide for PCC001 will be used in Mock Conversion 2. The results of Mock Conversion 2 will be shared with you during RW Task 571.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 3: Task Completion Rubric

Task Completion Rubric
The Conversion Approach has been reviewed, impacts considered, and the Mock Conversions workbook in Smartsheet updated to note review completion.
In the PCC001 workbook in your Agency's Secure File Share portal, the Convert Value column contains a value of 'Yes' or 'No' for each row of data in the Successful Conversions tab and the Conversion Error tab.
In the PCC001 workbook in your Agency's Secure File Share portal, if the Convert Value column has a selection of Yes, the following columns contain valid values: • Project Type • Project Start Date (date is before End Date) • Project End Date (date is after Start Date)
In the PCC001 workbook in your Agency's Secure File Share portal, no cells are yellow or red, indicating all required fields contain values and do not exceed the allowable field length.
In the Mock Conversions workbook in Smartsheet, a Mock 1 – Data Cleansing Status of 'Complete' has been selected or 'N/A' if there are no values to be converted for your agency.
Task tracker must be marked as 100% complete.

Task Instructions

Collaborate with your Change Champion Network and functional and technical subject matter experts to understand the approach to conversion activities. Review the PCC001 conversion results, provide updated Projects data in your *<Agency> PCC001 – Projects Conversion Workbook* in SharePoint, and provide a data cleansing status in your *<Agency> Mock Conversions* worksheet in Smartsheet.

SharePoint Navigation:

Florida PALM Secure File Share Portal > (Agency) Folder > Conversion Workbook Inventory > Mock 1 > PCC001 – Projects

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Inventories > Conversion Inventory > Mock Conversions

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 3 above.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Review the Conversion Approach with your Change Champion Network.
2) For applicable agencies, review PCC001 Mock Conversion results and complete updates to the PCC001 – Project Conversion Workbook, as necessary
3) Review your Data Readiness Plan and update, as necessary.
4) Provide you Data Cleansing Status in your Mock Conversions Worksheet in Smartsheet.
5) Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.
6) Complete task by **November 22, 2024**.
7) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
8) If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- Conversion Approach
- Data Readiness Guidance
- RW Task 555-A Supplemental
- PCC001 Layout
- Conversion Field Mapping