

## Task Instructions

**Subtasks ID:** 658-A

**Task Name:** *Submit Data Field Mapping (Org)*

**Task Start Date:** December 18, 2024

**Task Due Date:** February 14, 2025

**Project Impact:** Direct

## Task Description

Complete and submit data field mapping to support conversion activities.

658-A: Complete and submit mapping of FLAIR Org codes to Florida PALM Organization values to support conversion activities.

## Task Overview

***This task relies on Florida PALM Organization values provided by agencies in RW Task 567-B. If your agency's RW Task 567-B is incomplete, your <Agency> Field Mapping – Organization worksheet will be locked from editing until 567-B is verified as complete. If your Task was submitted late or had to be returned for correction, this can also delay the unlocking of your worksheet.***

Data conversion refers to the activities of **extracting** and **transforming** legacy data and **loading** it to Florida PALM. Florida PALM will use legacy data from FLAIR and enterprise systems to populate opening balances in the General Ledger and many other pieces of data needed to support operations at go-live. Data conversion is a shared responsibility between the Florida PALM Project (Project) and agencies.

Conversion activities requires accurate field data mapping of legacy data to Florida PALM. To support the understanding of conversion mapping, the Project has provided the Excel file, titled ***Agency Conversion Field Mapping Spreadsheet***, in the Knowledge Center on the [Conversion Catalog](#) page. This task requires agencies to confirm the mapped values of FLAIR Organization, OCA, Location Code, and Grant ID, which are required in agency conversions.

This task (Task 658) has been separated into multiple subtasks for ease of data management and agency progress reporting. Each subtask represents a separate field mapping workbook. Subtasks A-D are described below in Table 1.

*Table 1: Field Mapping RW Subtasks*

Subtask	Configuration Workbook Description	Planned Dates
658-A	Agencies will be required to review and update mapping of FLAIR Org values to Florida PALM Organization values.	Dec. 18, 2024 – Feb. 14, 2025
658-B	Agencies will be required to review and update mapping of FLAIR OCA values to Florida PALM values.	Dec. 18, 2024 – Feb. 14, 2025
658-C	Agencies will be required to review and update mapping of FLAIR Grant ID values to Florida PALM values.	Jan. 6, 2025 – Feb. 14, 2025
658-D	Agencies will be required to review and update mapping of FLAIR Location Codes values to Florida PALM Location Code values.	Feb. 3, 2025 – March 14, 2025

## Task Elements

A new worksheet, *<Agency> Field Mapping – Organization*, has been added to the Conversion Inventory folder of your Agency Workspace in Smartsheet. You previously provided the initial submission of Florida PALM Organization configuration values with RW Task 513, which allowed agencies to map FLAIR Organization codes to new Florida PALM Organization IDs. You then provided any necessary updates and confirmation of agency needed Florida PALM Organization configuration values in RW Task 567-B.

If you provided a mapping of FLAIR Organization Codes to Florida PALM Organization IDs during RW Task 513, that mapping has been prepopulated in your *<Agency> Field Mapping – Organization* worksheet. You must review the mapping and update as necessary. If you did not provide a mapping of values with RW Task 513, you must provide a mapping using this task. **All FLAIR Organization Codes provided in the worksheet must be mapped to a valid Florida PALM Organization ID or marked as not valid.**

Your worksheet is pre-populated with FLAIR Organization Codes that were found in the following active record types in FLAIR as of November 30, 2024:

- GL Balances
- Assets
- Encumbrances (with balances)
- Open Accounts Receivables

A supplemental Excel document is attached to the top row of your *<Agency> Field Mapping – Organization* worksheet. This supplemental document provides a listing of the active records that were pulled from FLAIR on November 30, 2024, that included the FLAIR Organization Codes listed in your worksheet. Use this supplemental document to support your understanding of how the FLAIR values are being used for Florida PALM conversion items.

Value Mapping Confirmation	FLAIR Organization Code	Mapped Florida PALM Organization ID	Update Mapping to Florida PALM Organization ID	Comments
Yes - Mapping is Correct				
Remove - FLAIR Organization Code Not Valid				
Update Mapping				

Figure 1: Conversion Mapping – Organization Worksheet

The *<Agency> Field Mapping – Organization* worksheet contains the following columns:

- Value Mapping Confirmation (Required for all rows of data)
  - Select the appropriate option from the drop-down.
    - Yes – Mapping is Correct: Select this option if the provided 'FLAIR Organization Code' and 'Mapped Florida PALM Organization ID' is correct and no changes are needed.

- Remove – FLAIR Organization Code Not Valid: Select this option if the FLAIR Organization code is no longer valid or active, therefore a mapping is not needed.
  - If you select this option, you must update any related records (see the supplemental document) containing the Organization Code in FLAIR so that the record will include a valid Organization Code in the next conversion data pull.
- Update Mapping: Select this option if:
  - The provided mapping is incorrect, and you need to provide a different Florida PALM Organization ID, or
  - There is no mapping provided, therefore you must provide a mapping to one of the values in the New Florida PALM Organization ID column.
- FLAIR Organization Code (Locked from editing)
  - This column is prepopulated to include FLAIR Organization Codes for your agency as of November 30, 2024, that are included in the following active record types:
    - GL Balances
    - Assets
    - Encumbrances (with balances)
    - Open Accounts Receivables
- Mapped Florida PALM Organization ID (Locked from editing)
  - This column contains a mapping to the new Florida PALM Organization ID, if you previously provided a mapping for Organization codes with RW Task 513 **and** the mapped Florida PALM Organization ID is still a valid configuration value based on your RW Task 567B submission.
  - The column is intentionally left blank if a mapping **was not provided** in RW Task 513.
- Update Mapping to Florida PALM Organization ID (Required if “Update Mapping” is selected in the Value Mapping Confirmation column)
  - This column contains a prepopulated drop-down list that includes all Florida PALM Organization IDs confirmed in the recent configuration task RW 567-B.
  - Select the correct Florida PALM Organization ID that should be mapped to the provided FLAIR Organization Code.
- Comments (Optional for agency use)

Below are a few helpful considerations to support your task completion:

- All FLAIR Organization Codes provided in this worksheet must be mapped to one and only one Florida PALM Organization ID, if not identified as ‘Remove – FLAIR Organization Code Not Valid’.
  - You will need to take action in FLAIR on any items marked ‘Remove – FLAIR Organization Code Not Valid’ or the value will appear in future conversions.
  - **If a mapping is not provided, any conversion record with an unmapped FLAIR Organization Code will be loaded using a default agency Florida PALM Organization ID**, which may require mitigative action by the agency after go-live to update the records.
- A single Florida PALM Organization ID can be mapped to multiple FLAIR Organization Codes.
- The FLAIR Organization Codes were pulled from FLAIR as of November 30, 2024. The provided FLAIR Organization Codes are not representative of all active codes. The provided list only includes those FLAIR Organization Codes that are found in active

records subject to conversion (Assets, Encumbrances, Accounts Receivables, and General Ledger Balances).

## How will agencies use this information?

Agencies will use the FLAIR Organization Code to Florida PALM Organization ID mapping to validate future Mock Conversion results. The mapping can also be used to support your end user understanding of the data change from the FLAIR Organization Code to Florida PALM Organization ID.

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

The FLAIR Organization Code to Florida PALM Organization ID mapping has a direct impact to the following conversions that include the Florida PALM Organization ChartField:

- AMC001 – Assets and Property
- ARC002 – Open Accounts Receivable
- POC001 – Open Encumbrances
- GLC001 – Ledger

The Florida PALM team will update the FLAIR Organization Code to Florida PALM Organization ID mapping, which will allow conversion records to be created in Florida PALM with your intended Florida PALM Organization ChartField value, providing more accurate conversion results for the agency.

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

*Table 2: Task Completion Rubric*

<b>Task Completion Rubric</b>
The <i>Value Mapping Confirmation</i> column has a selection for all rows of data.
“Update Mapping” or “Remove – FLAIR Organization Code Not Valid” is selected in the <i>Value Mapping Confirmation</i> column where a Florida PALM Organization ID is not prepopulated in the <i>Mapped Florida PALM Organization ID</i> column.
If “Update Mapping” is selected in the <i>Value Mapping Confirmation</i> column, a valid Organization ID is selected in the <i>New Florida PALM Organization ID</i> column.
Each row that contains Florida PALM comments in the <i>Comments</i> column, if any, contain a <i>Value Mapping Confirmation</i> column selection of 'Update Mapping' or 'Remove - FLAIR Organization Code Not Valid'.

## Task Instructions

### **Smartsheet Navigation:**

*Florida PALM Workbook for (Agency) > Conversion Inventory > Agency Conversion Mapping - Organization*

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 2 above.

Table 3: Summary of Task Completion Steps

<b>Summary of Task Completion Steps</b>	
<b>1)</b>	<i>Collaborate with your CCN and functional SMEs to review and update the Agency Conversion Mapping – Organization Workbook.</i>
<b>2)</b>	<i>Perform any necessary data cleanup in FLAIR for values where you have indicated “Remove – FLAIR Organization Code Not Valid”.</i>
<b>3)</b>	<i>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.</i>
<b>4)</b>	<i>Complete task by <b>February 14, 2025</b>.</i>
<b>5)</b>	<i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
<b>6)</b>	<i>If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.</i>

### Supporting Materials & Resources:

- Agency Conversion Field Mapping Spreadsheet, in the Knowledge Center, on the [Conversion Catalog](#) page
- Agency-Specific Supplemental Conversion Information – Attached to the top row of your <Agency> Field Mapping – Organization worksheet in Smartsheet