

Task Instructions

Task ID: 587-A

Task Name: *Complete Data Cleansing Based on Mock Conversion 3*

Task Start Date: *August 11, 2025*

Task Due and Close Date: *November 7, 2025*

Project Impact: *Direct*

Task Description

Complete data cleansing based on Mock Conversion 3 conversion results and perform data cleansing activities to prepare for Mock Conversion 4.

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, 545, 555, and 571) 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;
- Perform data cleansing of the identified data groups to prepare for conversion activities (e.g., update, remove or inactivate all unnecessary information); and
- Complete data cleansing activities after reviewing results of Mock Conversion 1 and 2.

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.

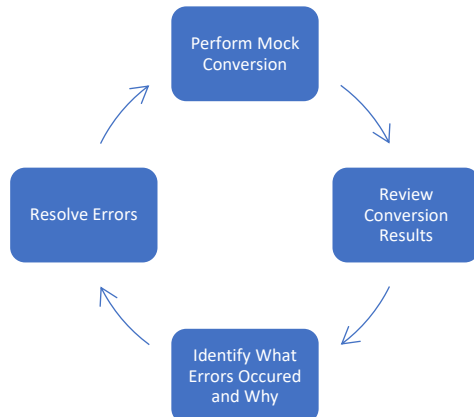


Figure 1: Mock Conversion Cycle

With each cycle of Mock Conversion, the Project provides you with the results of the conversions for your agency through a series of related RW Tasks (555, 571, 587, 597). You must review your agency's results 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 July 2026.

RW Task 587 has been separated into multiple subtasks for ease of data management and agency progress reporting. Subtasks A-C are starting today, as indicated in Table 1.

Table 1: Data Cleansing RW Subtasks

Subtask	Task Overview	Planned Dates
587-A	Agencies will be required to review the Mock Conversion 3 results for AMC001, CTC001, GLC001, GMC001, KKC001, PCC001, PCC002 and POC001, and perform any necessary data cleansing.	Aug. 11, 2025 – Nov. 7, 2025
587-B	Agencies will be required to review the Mock Conversion 3 results for APC001, review and confirm agency Supplier record data and review and confirm confidential suppliers.	Aug. 11, 2025 – Oct. 17, 2025
587-C	Agencies will be required to provide necessary data for Project records in preparation for Mock Conversion 4.	Aug. 11, 2025 – Oct. 29, 2025

Task Elements

This task contains three parts:

1. Review the Mock Conversion 3 results for AMC001, CTC001, GLC001, GMC001, KKC001, PCC001, PCC002, and POC001.
2. Perform data cleansing, if applicable.
3. Report data readiness progress in Smartsheet.

Review Mock Conversion 3 Results

The Project has completed Mock Conversion 3 for the conversions listed below in Table 2. The data used for Mock Conversion 3 was as of June 30, 2025.

Table 2: Mock Conversion 3 List

Conversion ID	Conversion Name	Source System	Applicable Agencies*
AMC001	Assets and Property	FLAIR	All Agencies – <i>except</i> JAC
CTC001	Contracts	FLAIR	AHCA, APD, CITRUS, COM, DACS, DBPR, DCF, DEM, DEP, DFS, DJJ, DMS, DOAH, DOE, DOEA, DOH, DOL, DVA, EOG, FCOR, FDC, FDLE, FDOT, FGCC, FLHSMV, FSDB, FWC, PSC, SCS
GLC001	Ledger	FLAIR	All Agencies
GMC001	Grants (for accounting purposes)	FLAIR	AHCA, CITRUS, COM, DACS, DCF, DEM, DEP, DFS, DJJ, DOE, DOEA, DOH, DOR, DVA, EOG, FDC, FDLE, FDOT, FLHSMV, FSDB, FWC
KKC001	Budgets	FLAIR	All Agencies
PCC001	Projects (for accounting purposes)	FLAIR	APD, DACS, DCF, DEM, DEP, DFS, DJJ, DMA, DMS, DOE, DOEA, DOH, DVA, EOG, FDC, FDLE, FDOT, FLHSMV, FWC, SCS

Conversion ID	Conversion Name	Source System	Applicable Agencies*
PCC002	Projects Life-to-Date Balances	FLAIR	APD, DACS, DCF, DEM, DEP, DOE, DOH, DVA, EOG, FDC, FDLE, FDOT, FWC,
POC001	Open Encumbrances	FLAIR, MFMP	All Agencies – <i>except Citrus</i>

*Applicable agencies listed as reported by agencies in the <Agency> Conversion Inventory worksheets, “Conversion Needed” column in Smartsheet.

Conversion results are detailed for each applicable conversion for your agency. Most conversions will have the four documents described below. These documents are shared in your Florida PALM Secure File Share Portal in the Conversion Workbook Inventory, Mock 3 folder.

1. **<Agency> <Conversion Name> Conversion Flat File** generated using your related data from the source system. This file is for information only.
2. **<Agency> <Conversion Name> 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, total records successfully processed, total records with errors and total records with warnings, if any.
3. **<Agency> <Conversion Name> 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> <Conversion Name> Record Extract** generated from Florida PALM after your data was transformed and loaded.
 - *Agency action:* Review the record extract to view the records that successfully loaded into Florida PALM. This will help you understand how your data will look in Florida PALM.

NOTE: For KKC001, agencies will only receive one file; the KKC001 Record Extract.

Perform Data Cleansing

After reviewing your Mock Conversion 3 results, it is now time to cleanse your agency’s data based on the conversion errors and your agency’s Data Readiness Plan. You should reference the related supplemental guidance for the corresponding conversion, as well as the [Agency Data Readiness Guidance](#) document to support your understanding of the conversions, errors, and the necessary actions required. Using those documents, make the appropriate updates in the source system for each conversion applicable to your agency.

NOTE: Data cleansing in FLAIR is not required for KKC001.

Report Data Readiness Progress in Smartsheet

Your <Agency> Mock Conversions worksheet in Smartsheet contains a summary of your agency’s mock conversion results. This worksheet will be used to include all summary data for all applicable 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 efforts.

For all applicable conversions, document the status of your agency data clean-up efforts in the Data Cleansing Status column in your <Agency> Mock Conversion worksheet.

Conversion Name	Mock 3 - Total Number of Records Received	Mock 3 - Successful Load Percentage	Mock 3 - Data Cleansing Status
AMC001 - Asset and Property			
CTC001 - Contracts			
GLC001 - Ledger			
GMC001 - Grants			
PCC001 - Projects			
PCC002 - Projects Life-To-Date Balances			
POC001 - Open Encumbrances			

Figure 2: Demo Mock Conversions Worksheet in Smartsheet

NOTE: KKC001 is not included in your <Agency> Mock Conversion worksheet as no data cleansing in FLAIR is required.

Table 3: <Agency> Mock Conversions Worksheet Columns

Column Name	Column Description
Conversion Name	Name of the conversion, beginning with the Project-assigned RICEFW ID.
Mock 3 - Total Number of Records Received	Number of records received from the source system for the Mock Conversion.
Mock 3 - 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.
Mock 3 - 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. This would only be selected if there are no values in the <i>Total Number of Records Received</i> column.

Column Name	Column Description
	<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.

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 clean-up efforts. You may also reference the [Agency Data Readiness Guidance](#) for additional information and resources to support your data cleansing activities.

How will agencies use this information?

Your agency's business processes and agency business systems benefit from having good, clean data successfully converted to Florida PALM. The Mock Conversion and related data cleansing 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.

Additionally, Mock Conversion 3 data will be loaded into the User Acceptance Testing (UAT) environment. This means if a record was in error in Mock 3, that record will not be available for testing during UAT.

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 updates you make to your agency data in the source systems will directly impact the conversion success rate in Mock Conversion 4. The results of Mock Conversion 4 will be shared with you during RW Task 597 and loaded into the UAT environment.

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

Table 4: Task Completion Rubric

Task Completion Rubric
In the Mock Conversions workbook in Smartsheet, for each row a Mock 3 – Data Cleansing Status of 'Complete' has been selected or 'Not Applicable' if the conversion is not applicable to 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 conversion errors 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 3

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 4 above.

NOTE: Due to this task being timebound, the task will be closed at the close of business on the due date; therefore, late submissions and resubmissions after the due date will not be permitted.

Table 5: Summary of Task Completion Steps

Summary of Task Completion Steps	
1)	Review the conversion results and complete data cleansing in source systems, as necessary.
2)	Review your Data Readiness Plan and update, as necessary.
3)	Provide your Data Cleansing Status in your Mock Conversions worksheet in Smartsheet.
4)	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.
5)	Complete task by November 7, 2025 .
6)	When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
7)	If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- [Conversion Approach](#)
- [Agency Data Readiness Guidance](#)
- [Mock Conversion 3 Supplemental – AMC001](#)
- [Mock Conversion 3 Supplemental – CTC001](#)
- [Mock Conversion 3 Supplemental – GLC001](#)
- [Mock Conversion 3 Supplemental – GMC001](#)
- [Mock Conversion 3 Supplemental – KKC001](#)
- [Mock Conversion 3 Supplemental – PCC001](#)
- [Mock Conversion 3 Supplemental – PCC002](#)
- [Mock Conversion 3 Supplemental – POC001](#)