

Task Instructions

Task ID: 587-B

Task Name: *Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers*

Task Start Date: August 11, 2025

Task Due and Close Date: October 17, 2025

Project Impact: *Direct*

Task Description

Review the APC001 Supplier Crosswalk, review and confirm confidential Suppliers, and review and confirm your agency Supplier record.

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.

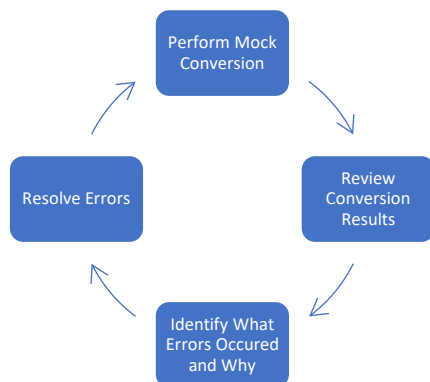


Figure 1: Mock Conversion Cycle

With each cycle of Mock Conversion, the Project will provide 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 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 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 – Oct. 17, 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. 17, 2025

Task Elements

This task contains three parts:

1. Review the APC001 Supplier Crosswalk
2. Confirm Confidential Suppliers
3. Review and update your Agency Supplier Record workbook.

Review the APC001 Supplier Crosswalk

APC001 converts supplier information to support business processes in the Accounts Payable, Purchasing, and Asset Management modules, and the Custom Grants Information page.

As part of APC001 Supplier Conversion for Mock Conversion 3, a one-time crosswalk file for conversion purposes only has been generated with data as of June 30, 2025 (this crosswalk is only valid for Mock Conversion 3 data). The Supplier Crosswalk ties the legacy Vendor IDs and Sequence Numbers to the Florida PALM Supplier IDs.

NOTE: *The Supplier IDs within the Supplier Crosswalk will change with each Mock Conversion. A new Supplier Crosswalk will be shared with agencies after each Mock Conversion run. A final Supplier Crosswalk will be shared with agencies as part of cutover activities for Financials and Payroll wave go-live.*

There is limited information available within the Supplier Crosswalk as this file is intended to provide the unique identifiers from the legacy systems mapped to the Florida PALM Supplier ID so that agency business systems can be updated. The Legacy Supplier ID will only be used for supplier conversion purposes and will not be part of the Florida PALM supplier record. Additional information regarding the Supplier Crosswalk and the layout of the file is available in the Knowledge Center [Suppliers \(APC001\)](#). The *Supplier Crosswalk* layout has been updated to include the Alternate Payment Name 1 field that will provide the Vendor Name value from the Legacy Sequence Number.

Recommended Agency Actions for Mock Conversion 3

- Review the *Supplier Crosswalk* which includes the Florida PALM generated Supplier IDs and agency supplier records. Agencies should use these Supplier IDs for User Acceptance Testing (UAT).
- Find all supplier records in the *Supplier Crosswalk* that are needed for use by your agency. Consider other conversion activities where there may have been errors due to missing supplier records, such as GMC001 and POC001. Suppliers will need to have active vendor records in the Statewide Vendor File to ensure records are properly converted.

Confirm Confidential Suppliers

FLAIR vendors listed on the *Supplier Crosswalk* will be converted into Florida PALM as non-confidential suppliers. The Department of Financial Services (DFS), Division of Accounting and Auditing (A&A), is recommending that when applicable, all agencies use the Confidential indicator on vouchers, encumbrances, and certified payables for most instances, reducing the need to have confidential suppliers in Florida PALM. If an agency determines a supplier needs to remain confidential in Florida PALM, the agency will need to indicate it on the *Supplier Crosswalk*.

Instances a supplier may need to remain confidential:

- Confidential informants
- Relationship between the agency and supplier is confidential

The following assumptions are considered when defining a confidential supplier:

- Agency supplier records will not be marked as confidential.
- A&A will approve all supplier records.
- The voucher's confidential indicator should be sufficient in most situations to protect confidential data.

Complete the following for each supplier record assigned to your agency's Business Unit in the *Supplier Crosswalk*:

1. Review each record with a 'Y' in the "Confidential Flag" column and determine the appropriate selection for the drop down in the "Florida PALM Confidential Flag" column:
 - a. N(o): The supplier **does not** need to be confidential in Florida PALM.
 - i. This is the default selection for **ALL** supplier records.
 - b. Y(es): The supplier **does** need to confidential in Florida PALM.

Use the Comments field, optionally, for your internal purposes or to provide additional information that needs to be considered for your *Supplier Crosswalk*.

You may filter and sort the *Supplier Crosswalk* document as necessary for your review; however, you may only edit the "Florida PALM Confidential Flag" or "Comments" columns. All other columns are locked from editing. To make edits, you must use the check-out/check-in feature in Secure File Share.

Review and Update Your Agency Supplier Record Workbook

You previously provided data to establish your agency's supplier record in RW Task 657-A. The data you provided for your agency's supplier record was used in APC001 Mock Conversion 3 to load your agency supplier record in Florida PALM. You can view your agency supplier record in the *Supplier Crosswalk* that has been provided in Secure File Share.

Your agency supplier record data is also found in the *(Mock 4) Agency Supplier Record* worksheet in Smartsheet. The data within this worksheet will be used to load your agency supplier record in the next mock conversion. Review and update your *(Mock 4) Agency Supplier Record* worksheet if necessary. Guidance for completing the worksheet within your agency-specific conversion workbook has been provided in the related [Agency Supplier Record supplemental document](#).

How will agencies use this information?

Agencies will use the data provided in the *Supplier Crosswalk* to understand that suppliers that will be available in UAT Online and prepare for Mock Conversion 4.

What will the Florida PALM Team do with this information?

This task has a direct impact to the Florida PALM Project. The Florida PALM team will use your confirmed confidential suppliers in the *Supplier Crosswalk* for Mock Conversion 4. Additionally, the data provided in your *(Mock 4) Agency Supplier Record* worksheet will be used to load your agency supplier record for Mock Conversion 4.

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

Table 2: Task Completion Rubric

Task Completion Rubric
"Column A – Florida PALM Confidential Flag" is complete for all suppliers in the <i>Supplier Crosswalk</i> worksheet in Secure File Share.
All required columns in the <i>(Mock 4) Agency Supplier Record</i> worksheet in Smartsheet are complete according to the instructions in the Agency Supplier Record supplemental document.
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Collaborate with your CCN and functional and technical SMEs to review the *Supplier Crosswalk* that was generated from APC001 for Mock Conversion 3. Within the *Supplier Crosswalk*, indicate which suppliers should be confidential, if any, for Mock Conversion 4. Review your agency supplier record data in the *(Mock 4) Agency Supplier Record* worksheet in Smartsheet and provide any necessary updates for Mock Conversion 4.

Smartsheet Navigation:

- Florida PALM Workbook for (Agency) > Inventories > Conversion Inventory

SharePoint Navigation:

- Florida PALM Secure File Share Portal > (Agency) Folder > Conversion Workbook Inventory > Mock 3 > APC001 - Suppliers

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.

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 3: Summary of Task Completion Steps

Summary of Task Completion Steps	
1)	Collaborate with your CCN and functional and technical SMEs to review the Supplier Crosswalk.
2)	Within the Supplier Crosswalk, indicate if any suppliers should be loaded in Mock Conversion 4 as confidential suppliers.
3)	Review and update your (Mock 4) Agency Supplier Record as necessary for Mock Conversion 4.
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 October 17, 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:

- [Agency Supplier Record Supplemental](#)
- [APC001 Supplemental](#)