

Task Instruction Addendum

Task ID: 326

Task Name: *Update Current-State Agency Business System Inventory and Documentation*

Task Start Date: *March 13, 2023*

Task Addendum Release: *September 25, 2023*

Task Due Date: *October 27, 2023*

Task Instruction Update

The initial release of this task requires agencies to identify and document all agency business systems and interfaces that share and/or use FLAIR data. As Florida PALM is being designed, it is critical for the Project to understand how agencies plan to integrate their agency business systems with Florida PALM as well as be able to identify possible trends and areas for process improvement across agencies with business system usage or function. In an effort to better understand agency integration plans and to further assist agency planning efforts, additional information about agency business systems is being requested.

Current-State Business Systems Worksheet Update

The Current-State Business Systems Worksheet in Smartsheet has been updated to include additional and repurposed/renamed columns to be completed. Agencies should provide all requested information for each of their agency business systems for the columns described below:

- **System Readiness Activity** (previously titled: Retain Post-PALM Implementation) – Select (one or more) from the drop down list what your agency anticipates undertaking to ready the system for Florida PALM.
 - Replace the Entire System
 - Replace Components of the System
 - Remediate the Entire System
 - Remediate Components of the System
 - Retire the Entire System
 - Retire Components of the System
 - No Changes Anticipated
 - Uncertain at this time
- **Readiness Level of Effort** – Select from the drop down list the anticipated degree of change needed for the Agency Business System. Examples are provided for consideration; however, please consider the known or anticipated amount of time or staff/contractor resource commitment, etc. when specifying the level of effort.
 - High – For example, extensive logic and function changes, substantial integration with other agency business systems, or procurement/development of new system
 - Medium – For example, moderate logic and function changes
 - Low – For example, simple values or table changes
 - None or N/A
 - Uncertain at this time
- **Planned Integration** – Select from the drop down list the type of integration the agency business system will have with Florida PALM.
 - Interfaced / Direct Connection Using Standard Interface

- Data Load from Data Warehouse
- Both: Standard Interface and Data Warehouse
- No Direct Integration
- Uncertain at this time
- **Business Functions Supported** – Select (one or more) from the drop down list the agency business function(s) supported by the agency business system. This list is largely modeled after the [Business Process Groupings](#).
 - Account Management and Financial Reporting
 - Accounts Receivable
 - Asset Accounting and Management
 - Banking
 - Billing / Customer Relationship Management
 - Budget Management
 - Cash Control
 - Contracts Management
 - Cost Allocation
 - Data Repository
 - Disbursement Management
 - General Ledger
 - Grants Management
 - Inventory Management
 - Payroll Management
 - Projects Management
 - Revenue Accounting
 - System Access and Controls
- **Business Purpose** (previously titled: Justification for Retention) – Describe the business needs met by this agency business system that are not provided by or that cannot be performed in FLAIR, including PYRL and IW.

Please include any additional information in the Comment field, as appropriate.

Instructions
<i>1) Continue progress on this task, per the original task instructions. Update your Current-State Business Systems worksheet in Smartsheet. Provide responses in the empty cells for all business systems.</i>
<i>2) Complete the Current-State Business Systems worksheet, Current-State Interfaces worksheet, and updates to agency business system documentation by October 27, 2023. Please note that ALL columns are required for this task to be considered complete.</i>
<i>3) If you have questions regarding the updates to this task, participate or review the Tuesday Task Talk on Tuesday, September 26, 2023, or contact your RC.</i>
<i>4) Participate in future touch points / meetings (e.g., Tuesday Task Talks, Town Halls) related to this task.</i>
<i>5) Be prepared to discuss your agency's progress through monthly touchpoint meetings with your RC.</i>