# Understanding your Dashboard

An Agency Readiness Certification #4 Dashboard (Dashboard) has been created within your Agency Readiness Certification #4 folder in Smartsheet (example shown below in Figure 1). The Dashboard serves as the tool for the Agency Sponsor to submit your agency's final readiness status for Readiness Certification #4.

***Smartsheet Navigation:***

*Florida PALM Workbook for (Agency) > Agency Readiness > Agency Readiness Certification*

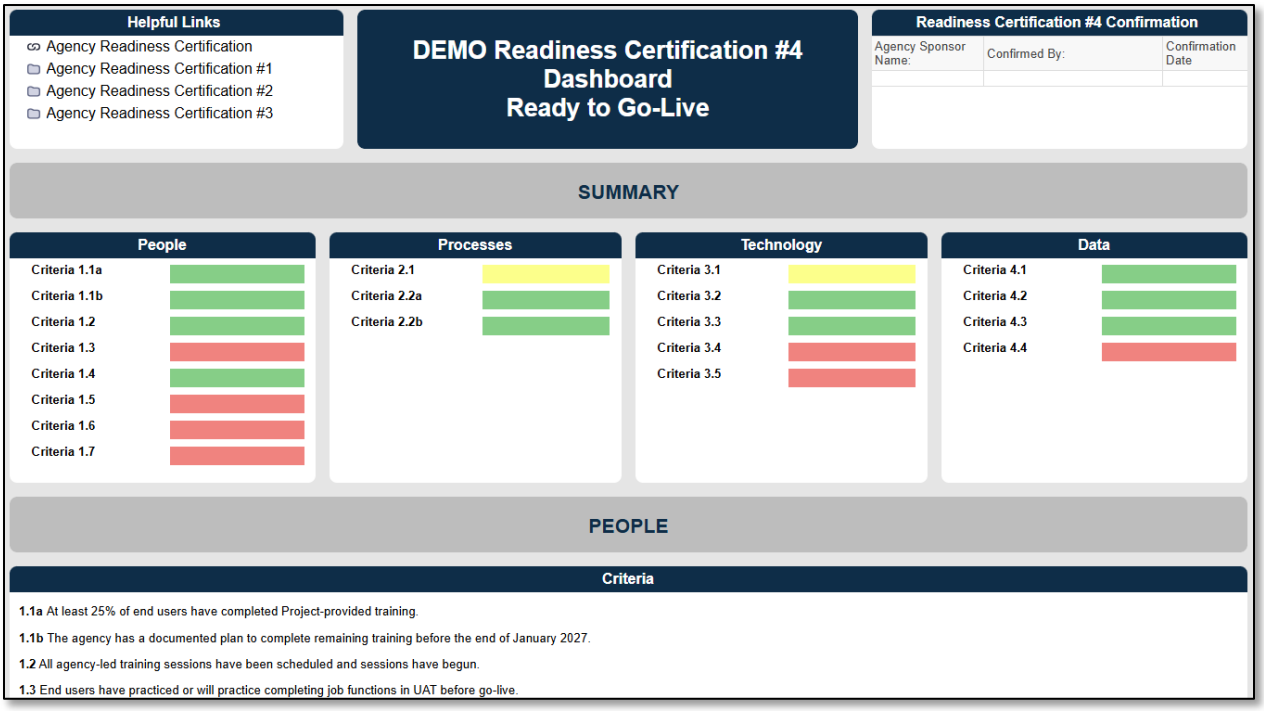



*Figure 1: DEMO Readiness Certification Dashboard*

The Dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- *<Agency> Readiness Certification #4*
- *<Agency> Readiness Mitigation #4*
- *<Agency> Readiness Workplan Task Tracker*
- *<Agency> Role Mapping Worksheet*
- *<Agency> Business Process Documentation Inventory Worksheet*
- *<Agency> Training Completion Tracker*
- *<Agency> Critical Business Process Confirmation*
- *<Agency> Interface Testing Confirmation*
- *<Agency> Critical Reporting Needs Confirmation*

### *Critical Operational Elements*

The Dashboard is organized to provide a view of agency readiness across the four critical operational elements:

- People – The staff and stakeholders affected by your agency's transition to Florida PALM
- Processes – The sequence of procedures to accomplish a business objective
- Technology – The applications or tools used to process, track, or report on financial operations
- Data – Information used in or processed from an agency's financial business operations

## Helpful Links Section

The "Agency Readiness Certification" link in the Helpful Links section of your Dashboard (Figure 2) navigates to the Agency Readiness Reporting page of the Florida PALM website, where you can find additional information about Agency Readiness Certification and criteria. The "Agency Readiness Certification #1", "Agency Readiness Certification #2", and "Agency Readiness Certification #3" links navigate to the folder in your agency Smartsheet workspace that includes your worksheets and Dashboards from certifications previously submitted.




*Figure 2: Helpful Links section*

## Readiness Certification Confirmation Section

The Readiness Certification Confirmation section (Figure 3) provides a view of the Sponsor Confirmation, including the date confirmed. The section will populate once the Agency Sponsor submits the certification confirmation.

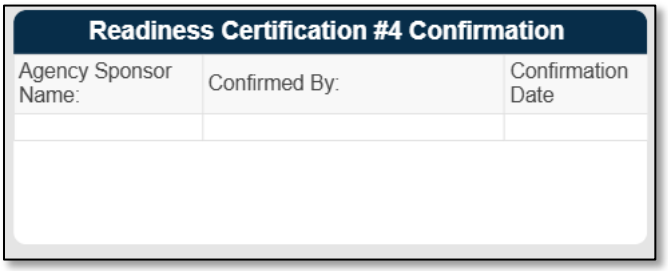



*Figure 3: Readiness Certification Confirmation Section*

## Summary Section

The Summary section (Figure 4) contains four widgets, one for each critical operational element. All data displayed in this section is derived from the *<Agency> Readiness Certification* worksheet.

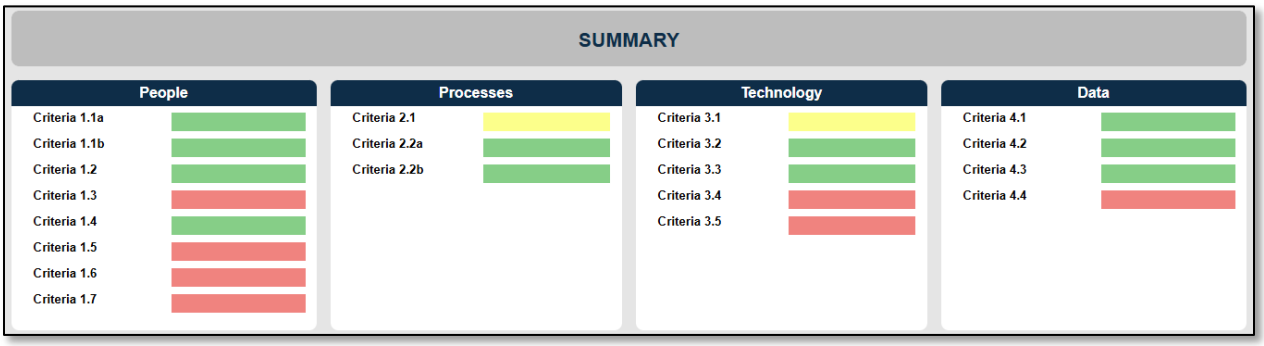



*Figure 4: Summary Section*

Responses of 'Met', 'Not Met', or 'N/A' for each Readiness Certification Criteria, with the exception of Criteria ID 2.1, 3.1, and 4.4 are displayed as the following colors:

- Criteria that are met are displayed as green.
- Criteria that are not met are displayed as red.
- Criteria that are N/A are displayed as gray.

Criteria IDs 2.1, 3.1, and 4.4 are displayed as the following colors, based on a calculated percentage complete:

- 100% complete are displayed as green.
- 99.99% - 75.00% complete are displayed as yellow.
- Less than 75% complete are displayed as red.

## Critical Operational Element Sections (People, Processes, Technology, Data)

Each of the critical operational elements has a designated section on the dashboard. The following widgets are found within designated sections on the dashboard.

### *Criteria*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in all four sections.***

The Criteria widget (Figure 5) provides the Readiness Certification Criteria required for that critical operational element.

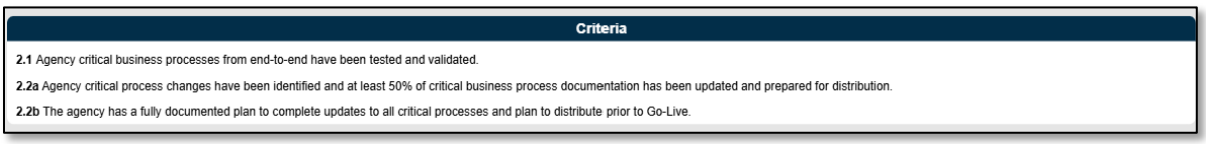



*Figure 5: Criteria widget in Processes section*

### *Readiness Certification Worksheet*

***Agency action is required for this section via completion of the <Agency> Readiness Certification #4 worksheet. This widget is found in all four sections.***

The Readiness Certification Worksheet widget (Figure 6) provides the agency- and Project-provided responses to each readiness certification criteria for that critical operational element. The data is pulled directly from the *<Agency> Readiness Certification #4* worksheet.

**Readiness Certification Worksheet**

| Critical Operational Element | Criteria ID | Criteria | Related Data/Percent Complete/Task Status | Criteria Met | Basis for Answer |
|---|---|---|---|---|---|
| People | 1.1a | At least 25% of end users have completed Project-provided training. | 95.24% | | |
| People | 1.1b | The agency has a documented plan to complete remaining training before the end of January 2027. | | | |
| People | 1.2 | All agency-led training sessions have been scheduled and sessions have begun. | Number of Sessions Completed and Scheduled = 2/50 | | |
| People | 1.3 | End users have practiced or will practice completing job functions in UAT before go-live. | Percent of Users Logged in More than Once = 90% | | |
| People | 1.4 | End users have tested and validated end user roles. | | | |
| People | 1.5 | All impacted stakeholders are aware of go-live. | | | |
| People | 1.6 | Agency is tracking user and role changes in UAT since the UAT Refresh, has a plan for a final submission of complete and error-free role mapping before go-live and has a plan to track user or role changes until cutover. | | | |
| People | 1.7 | Agency has identified their post-implementation support team and has a plan to prepare that team for their roles after go-live. | | | |

*Figure 6: Readiness Certification Worksheet widget in People section*

## *Mitigation Plan*

***Conditionally, agency action is needed for this section, depending on the responses in the <Agency> Readiness Certification #4 worksheet. This widget is found in all four sections.***

The Mitigation Plan widget (Figure 7) displays agency-provided mitigation plans for each Readiness Certification Criteria of 'Not Met'. The data is pulled directly from the *<Agency> Readiness Mitigation* #4 worksheet.

**Mitigation Plan**

| Criteria ID | Why has the criteria not been met? | What mitigating actions are being taken? | Who is responsible for supporting the mitigation? | Impact/workaround if mitigation is not completed? | Planned completion date of the mitigation steps? |
|---|---|---|---|---|---|

*Figure 7: Mitigation Plan widget in People section*

## *Currently Released Overall Subject Area Trainings*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the People section.***

The Currently Released Overall Subject Area Trainings widget, located in the People section (Figure 8), displays data for the web-based training (WBT) that the Project released on October 2 and October 16. This includes the total required, currently released WBTs for your end users and the number of required, currently released WBTs that your end users have completed, as reported in your *<Agency> Training Completion Tracker* worksheet.

***NOTE**: If percent complete is less than 25.00%, the row will be yellow. If percent complete is 25.00% or greater, the row will be green.*

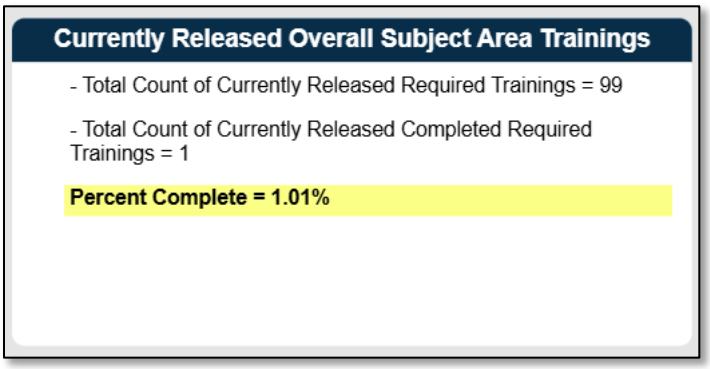



*Figure 8: Currently Released Overall Subject Area Trainings widget in People section*

## *UAT Activity*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the People section.***

The UAT Activity widget, located in the People section (Figure 9), displays the total count of active end user profiles in UAT, the total count of end users that have logged into UAT more than once, and the percent of active users that have logged in more than once in the UAT environment.

The data will be sourced from the UAT environment and will be populated by the Project as of October 30, 2026.

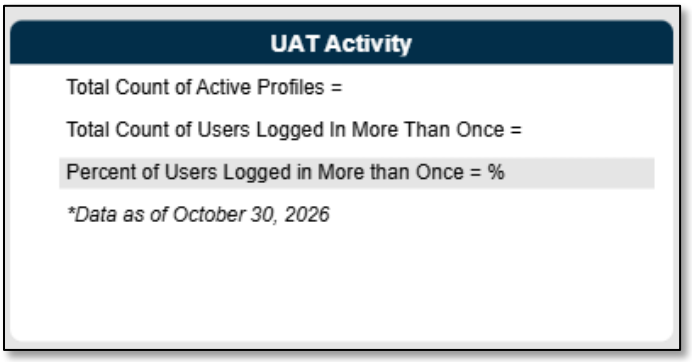



*Figure 9: UAT Activity Data*

## *End User Data*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the People section.***

The End User Data widget, located in the People section (Figure 10), displays the total number of agency end users role mapped, the count of role mapping errors (this includes DW/BI Error

Messages, SOD Errors, and SAM Error Messages), and the count of End Users with SOD conflicts. The data is pulled from your *<Agency> Role Mapping Worksheet* in Smartsheet.

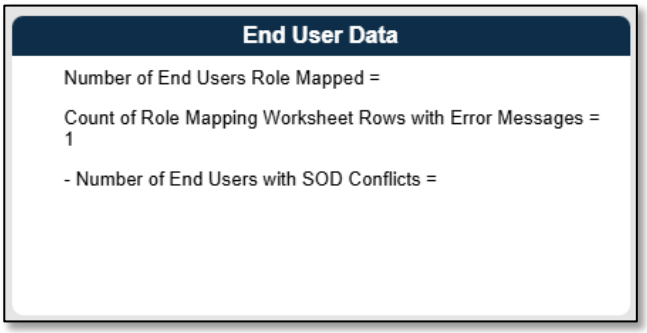



*Figure 10: Role Mapping*

## *Critical Business Process Confirmation*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Processes section.***

The Critical Business Process Confirmation widget, located in the Processes section (Figure 11), displays the total count of agency-reported critical business processes and the total count of critical processes that have been fully tested. This data is pulled from your *<Agency> Critical Business Process Confirmation*.

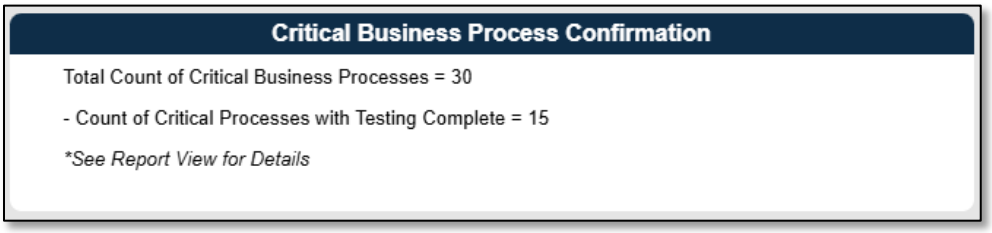



*Figure 11: Critical Business Process Confirmation widget*

## *Business Process Documentation Updates*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Processes section.***

The Business Process Documentation Updates widget, located in the Processes section (Figure 12), summarizes the total number of topics based on user stories, topics dispositioned for business process creation or updates, and the number of documentation process updates that have been reported as complete. This data is pulled from your *<Agency> Agency Business Process Documentation Inventory* worksheet.

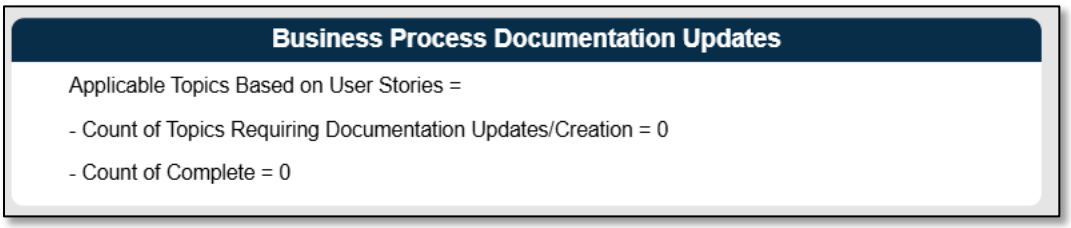



*Figure 12: Business Process Documentation Updates widget*

## *Interface Testing Confirmation*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Technology section.***

The Interface Testing Confirmation widget (Figure 13), located in the Technology section, provides the total count of interface connections and the count of interface connections that have been reported as testing complete. This data is pulled from your <*Agency*> *Interface Testing Confirmation* worksheet.

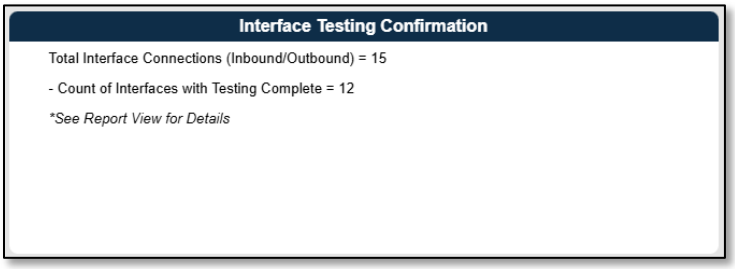



*Figure 13: Interface Testing Confirmation Widget*

## *Related RW Tasks*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Data section.***

The Related RW Tasks widget (Figure 14) provides a view of your agency's status of the RW tasks that are related to the Readiness Certification Criteria. Each task includes the agency-reported task progress and the Project-provided verification status pulled from the <*Agency*> *RW Task Tracker*.

**Related RW Tasks**

| Task ID | Task Name | Agency Reported Task Progress | Project Verification of Completion |
|---|---|---|---|
| **705** | Complete Data Cleansing in Preparation for Dry Run 3 | 100% - Submitted | Task Closed - Submission Incomplete |
| **706** | Submit Configuration and Conversion Workbooks | 100% - Submitted | Task Closed - Submission Incomplete |
| **709** | Submit Configuration and Conversion Workbooks | 100% - Submitted | Task Closed - Submission Incomplete |

*Figure 14: Related RW Tasks widget in People section*

***NOTE:*** *RW Tasks 712 (Final Data Cleansing) and 714 (Final Workbook Submissions) have a due date of November 30 and are not expected to be complete before submission of Readiness Certification #4. Agencies should provide a status reflecting actual progress made, if any, within the <Agency> RW Task Tracker.*

## *Worksheet Errors*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Data section.***

The Worksheet Errors widget, located in the Data section (Figure 15), displays a total count of rows in error in your agency's:

- combined configuration workbooks, and
- combined conversion worksheets

You can view all errors in your *<Agency> Consolidated Error Message Report* and review the individual worksheet supplemental documents for guidance on how to resolve worksheet errors.

***NOTE:*** *Worksheet error counts may not be reflective of all issues requiring updates in a workbook. There may be missing data or other errors captured by conditional formatting that may not be captured in the Error Message counts.*

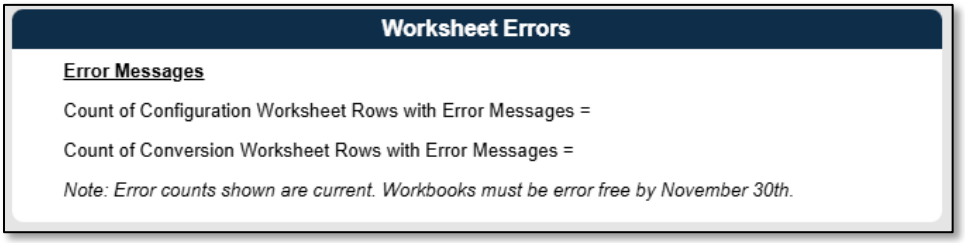



*Figure 15: Worksheet Errors widget*

## *Reporting Needs Confirmation*

***No agency action is needed in this section, as it's provided for reference only. This widget is found in the Data section.***

The Critical Reporting Needs Confirmation widget, located in the Data section (Figure 16), summarizes the total count of Topics with critical reporting needs and the count of those needs that have been confirmed as 'testing complete'. This data is pulled from your *<Agency> Critical Reporting Need Confirmation* worksheet.

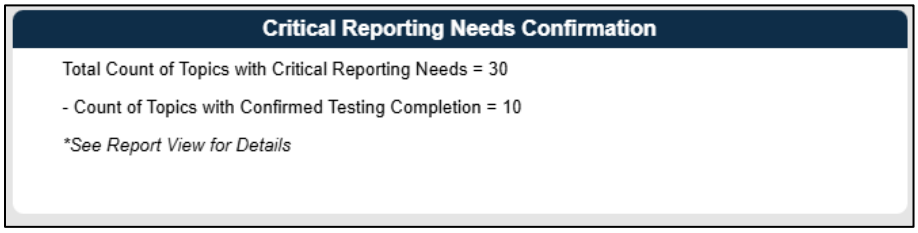



*Figure 16: Critical Reporting Needs Confirmation widget*

## Agency Sponsor Confirmation Section

***Agency action is needed for this section via completion of the Agency Sponsor Confirmation.***

The Agency Sponsor Confirmation (Figure 17) allows for easy submission of the Readiness Certification Dashboard. The confirmation should only be submitted by the Agency Sponsor after all required worksheets are complete. Upon submission, a confirmation status will appear in the Status Report Confirmation section at the top of the page.

***NOTE:*** *The Submission Form will be enabled starting on November 2 to allow submissions and will close promptly at 6pm on the task due date, November 10.*

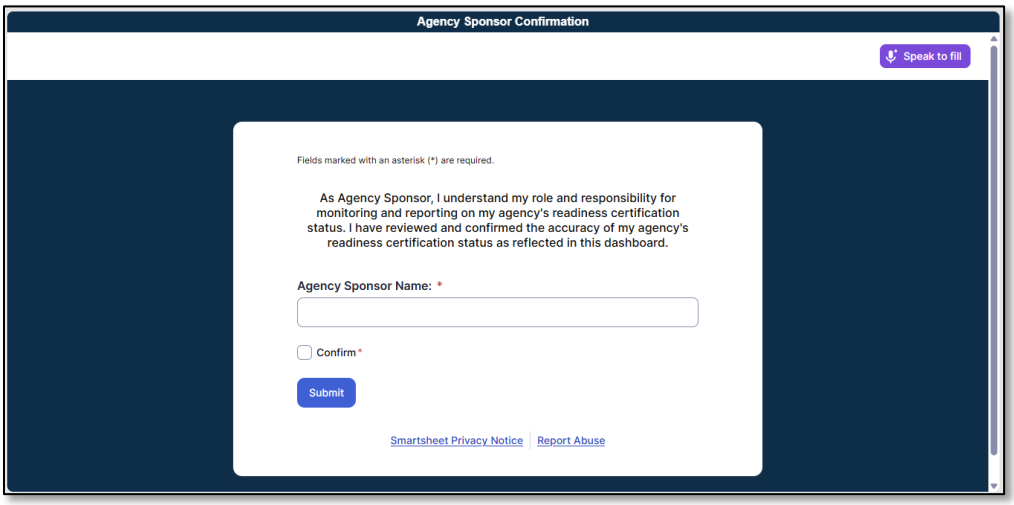



*Figure 17: Agency Sponsor Confirmation section*