

## Dashboard Overview

An <Agency> Monthly Progress Report dashboard (example shown below in Figures 1 - 6) has been created within your agency's Florida PALM Workbook in Smartsheet. The Monthly Progress Report dashboard provides a high-level view of your agency's testing activity including reported interface and user story testing activity, UAT role mapping and participation, and conversion and configuration data readiness. The dashboard also serves as the tool for your Agency Sponsor to confirm and submit your agency's progress each month.

The <Agency> Monthly Progress Report dashboard is designed to allow agencies to confirm progress of interface testing and UAT activities. The dashboard has and is expected to continue to evolve over time to display relevant data and metrics related to activities including participation in UAT, full integration testing, data cleansing, training, and cutover.

### Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

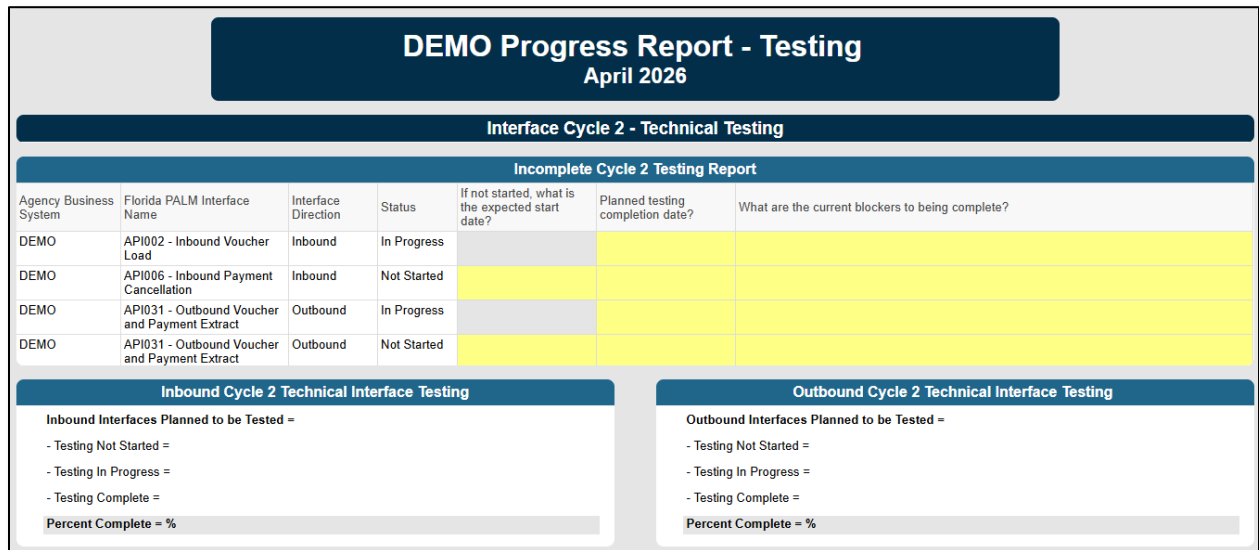


Figure 1: Demo Monthly Progress Report – Testing Dashboard (Panel 1)

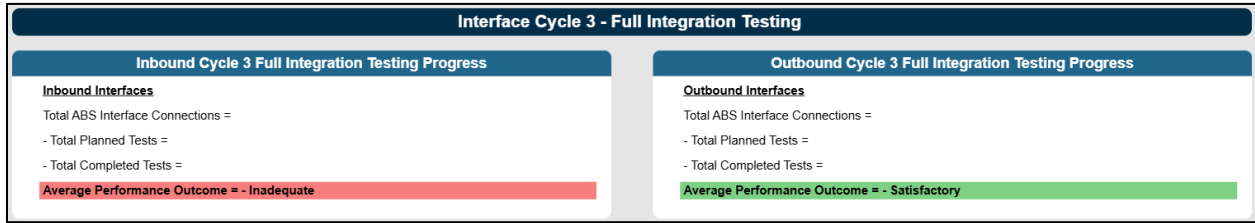


Figure 2: Demo Monthly Progress Report – Testing Dashboard (Panel 2)

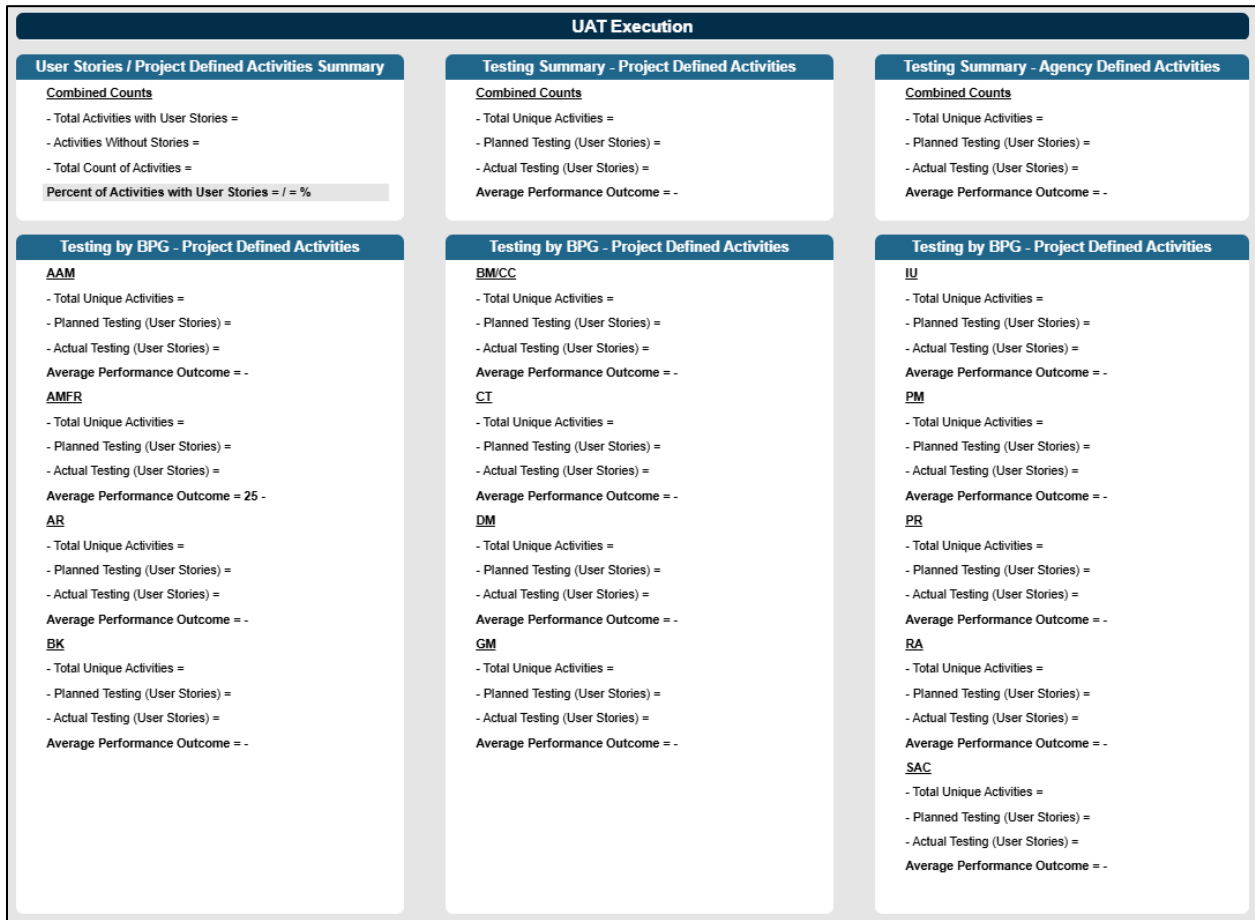


Figure 3: Demo Monthly Progress Report – Testing Dashboard (Panel 3)

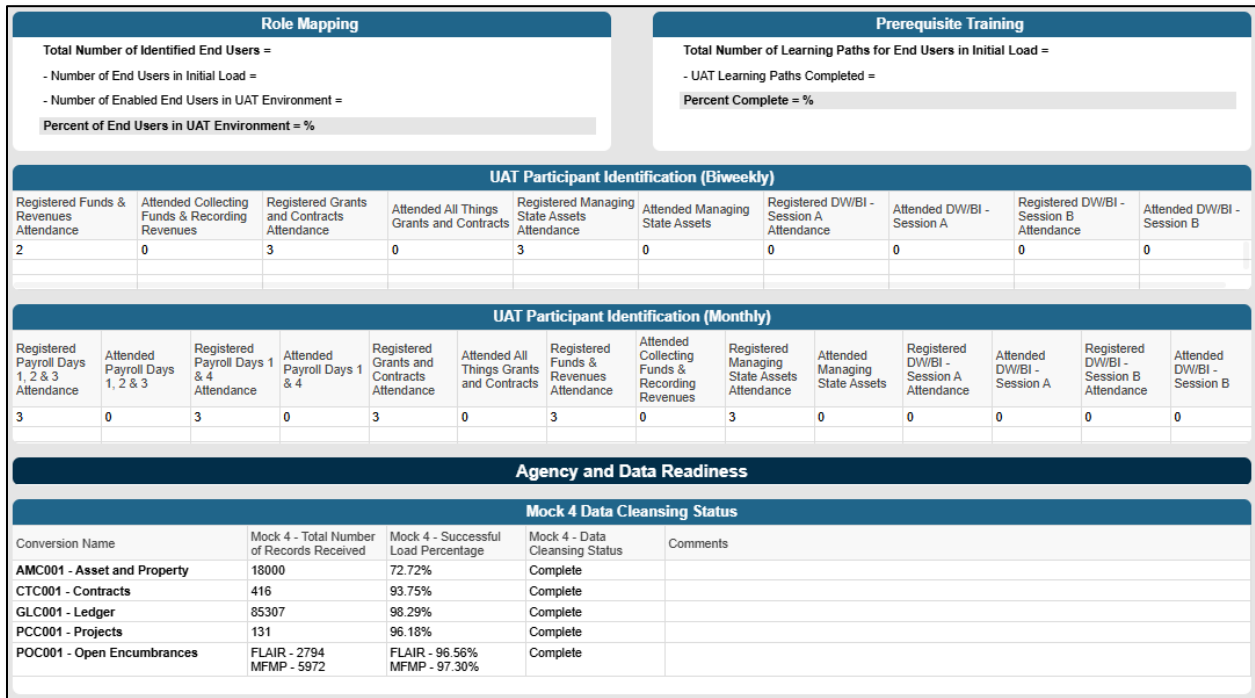


Figure 4: Demo Monthly Progress Report – Testing Dashboard (Panel 4)

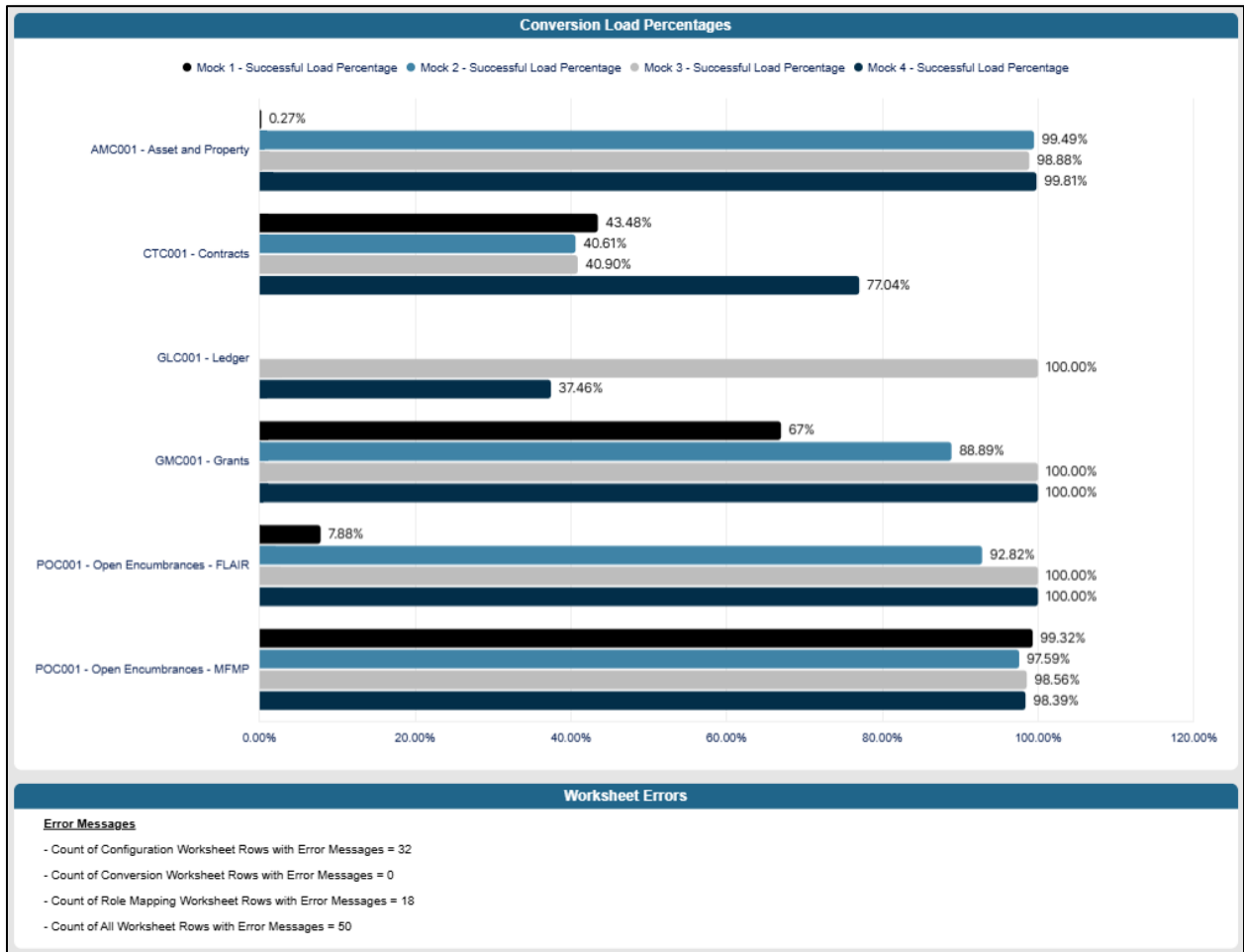


Figure 5: Demo Monthly Progress Report – Testing Dashboard (Panel 5)

**Submission**

**Agency Sponsor Confirmation**

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's progress testing report. I have reviewed and confirmed the accuracy of my agency's readiness and testing status as reflected in this dashboard.

Agency Sponsor Name: \*

Confirm \*

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**DEMO Progress Report Confirmation**

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
February 2026	Steven Fielder	floridapalm@myfloridacfo.com	02/24/26
January 2026	Steven Fielder	floridapalm@myfloridacfo.com	01/26/26

Figure 6: Demo Monthly Progress Report – Testing Dashboard (Panel 6)

The Monthly Progress Report dashboard is populated using agency reported data from the following resources located in your Florida PALM Workspace in Smartsheet:

Table 1: Smartsheet Resources for Monthly Status Report and Agency Applicability

<b>Smartsheet Resource</b>	<b>Agency Applicability</b>
<Agency> <i>Incomplete Cycle 2 Testing Check In</i> worksheet	Required only for agencies that have not completed Cycle 2 testing
<Agency> <i>Interface Cycle 3 – Full Integration Testing</i> worksheet	Required for all interfacing agencies
<Agency> <i>User Story Inventory</i> worksheet	Required only for agencies that have chosen to document user stories <u>outside</u> of the Change Analysis tool
<Agency> <i>Change Analysis</i> worksheets	Required only for agencies that have chosen to document user stories <u>within</u> the Change Analysis tool
<Agency> <i>Prerequisite Tracking</i> worksheet	Required for all agencies
<Agency> <i>Role Mapping</i> worksheet	Required for all agencies
<Agency> <i>UAT Participation Identification</i> report	Maintained by the Project for all agencies
<Agency> <i>Mock Conversion</i> worksheet	Required for all agencies
<Agency> <i>User Story Activity Coverage</i>	Required for all agencies
<Agency> <i>Configuration and Conversion Worksheets</i>	Required for all agencies

## Interface Cycle 2 - Technical Testing Section

The Interface Cycle 2 - Technical Testing section (Figure 7) is designed to help you understand your agency’s current Cycle 2 testing progress and status, if applicable. This section will only appear on dashboards for agencies that have not completed Interface Cycle 2 – Technical Testing. This section will be removed from agency’s dashboard the month following completing Cycle 2 testing.

Interface Cycle 2 - Technical Testing						
Incomplete Cycle 2 Testing Report						
Agency Business System	Florida PALM Interface Name	Interface Direction	Status	If not started, what is the expected start date?	Planned testing completion date?	What are the current blockers to being complete?
DEMO	API002 - Inbound Voucher Load	Inbound	In Progress			
DEMO	API006 - Inbound Payment Cancellation	Inbound	Not Started			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	In Progress			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	Not Started			

Inbound Cycle 2 Technical Interface Testing		Outbound Cycle 2 Technical Interface Testing	
<b>Inbound Interfaces Planned to be Tested =</b>		<b>Outbound Interfaces Planned to be Tested =</b>	
- Testing Not Started =		- Testing Not Started =	
- Testing In Progress =		- Testing In Progress =	
- Testing Complete =		- Testing Complete =	
<b>Percent Complete = %</b>		<b>Percent Complete = %</b>	

Figure 7: Interface Cycle 2 - Technical Testing Section

### Incomplete Cycle 2 – Technical Testing

The Incomplete Cycle 2 Testing Report section (Figure 8) displays your agency’s expected start and completion dates, and the reported blockers for why testing is incomplete from your <Agency> *Incomplete Cycle 2 Testing Check In* worksheet.

This report will only be available if your agency has interfaces that have not started or have not completed Cycle 2 testing.

Incomplete Cycle 2 Testing Report						
Agency Business System	Florida PALM Interface Name	Interface Direction	Status	If not started, what is the expected start date?	Planned testing completion date?	What are the current blockers to being complete?
DEMO	API002 - Inbound Voucher Load	Inbound	In Progress			
DEMO	API006 - Inbound Payment Cancellation	Inbound	Not Started			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	In Progress			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	Not Started			

Figure 8: Interface Testing Readiness Section

Review the [Incomplete Cycle 2 Testing Supplemental](#) to learn more on how to complete this section.

### Inbound/Outbound Cycle 2 Technical Interface Testing

The Interface Testing Progress – Inbound/Outbound section (Figure 9) is grouped by the direction of the interface (e.g., into Florida PALM, out from Florida PALM) and displays your agency’s interface testing progress, which is maintained in your <Agency > *Cycle 2 Technical Interface Testing* worksheet.

- **Testing Not Started** indicates the count of interfaces that are planned to be tested (i.e., needed for go live) but testing has not started.
- **Testing in Progress** indicates the count of interfaces that are currently undergoing testing activities.
- **Testing Complete** indicates the count of interfaces that have had at least one successful test.

- **Percent Complete** indicates the percentage of interfaces that have had at least one successful test (Testing Complete / Inbound (Outbound) Interfaces Planned to be Tested).

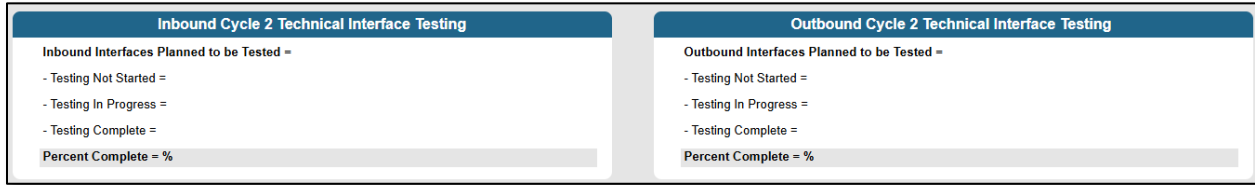


Figure 9: Inbound/Outbound Interface Testing Section

**NOTE:** If Interface Testing is complete for either Inbound or Outbound, the progress statistics will be replaced with a green bar, indicating completion, as shown in Figure 10.

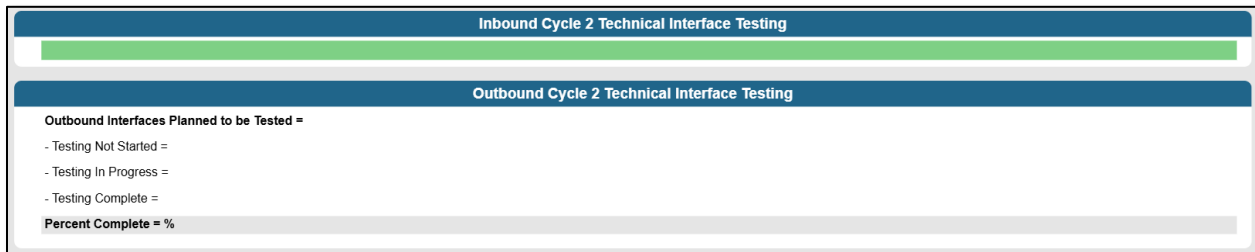


Figure 10: Inbound/Outbound Complete

Review the [Interface Testing Worksheet Supplemental](#) to learn more on how to complete this section.

## Interface Cycle 3 – Full Integration Testing Section

The Interface Cycle 3 – Full Integration Testing section (Figure 11) is designed to help you track your agency end-to-end interface testing progress during All Agency UAT.

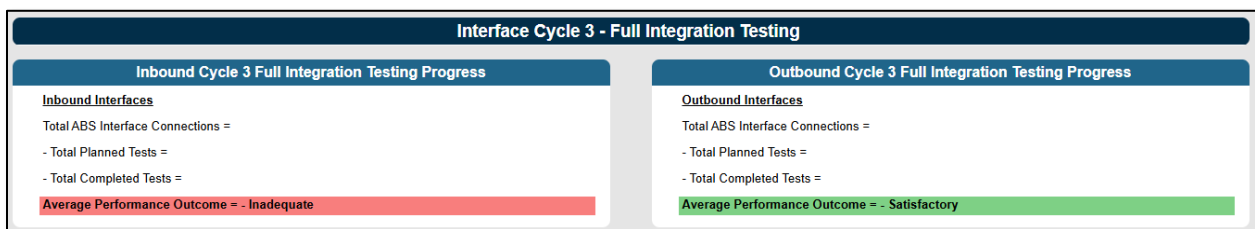


Figure 11: Interface Cycle 3 – Full Integration Testing

## Cycle 3 Interface Testing Progress

The Cycle 3 Interface Testing Progress is grouped by the direction of the interface (e.g., into Florida PALM, out from Florida PALM) and displays a summary of your agency’s end-to-end interface testing progress, which is maintained in your <Agency> Cycle 3 – Full Integration Testing worksheet.

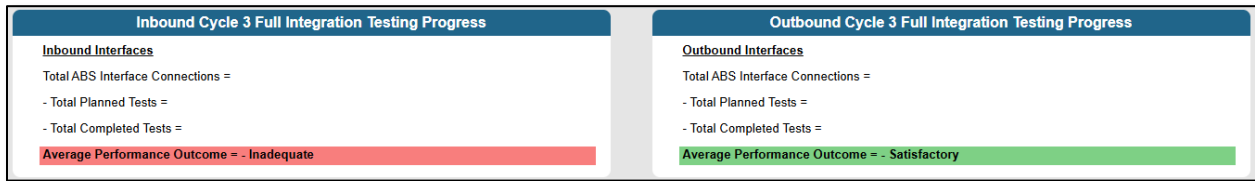


Figure 12: Interface Cycle 3 – Full Integration Testing Inbound/Outbound

- *Total ABS Interface Connections* indicates a total count of all unique Agency Business System interface connections.
- *Total Planned Tests* indicates the total count of all tests that your agency plans to conduct for the month.
- *Total Completed Tests* indicates the total count of all tests completed during the month.
- *Average Performance Outcome* averages all the values of the Performance Outcome column selections to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. Table 2 for details.

Table 2: Average Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

\*The Performance Outcome column is found in your <Agency> Cycle 3 – Full Interface Testing worksheet.

Review the [Cycle 3 – Full Interface Testing Supplemental](#) to learn more on how to complete this section.

## UAT Execution Section

The UAT Execution section (Figures 13 and 14) is designed to help you understand your agency's current UAT progress and status.

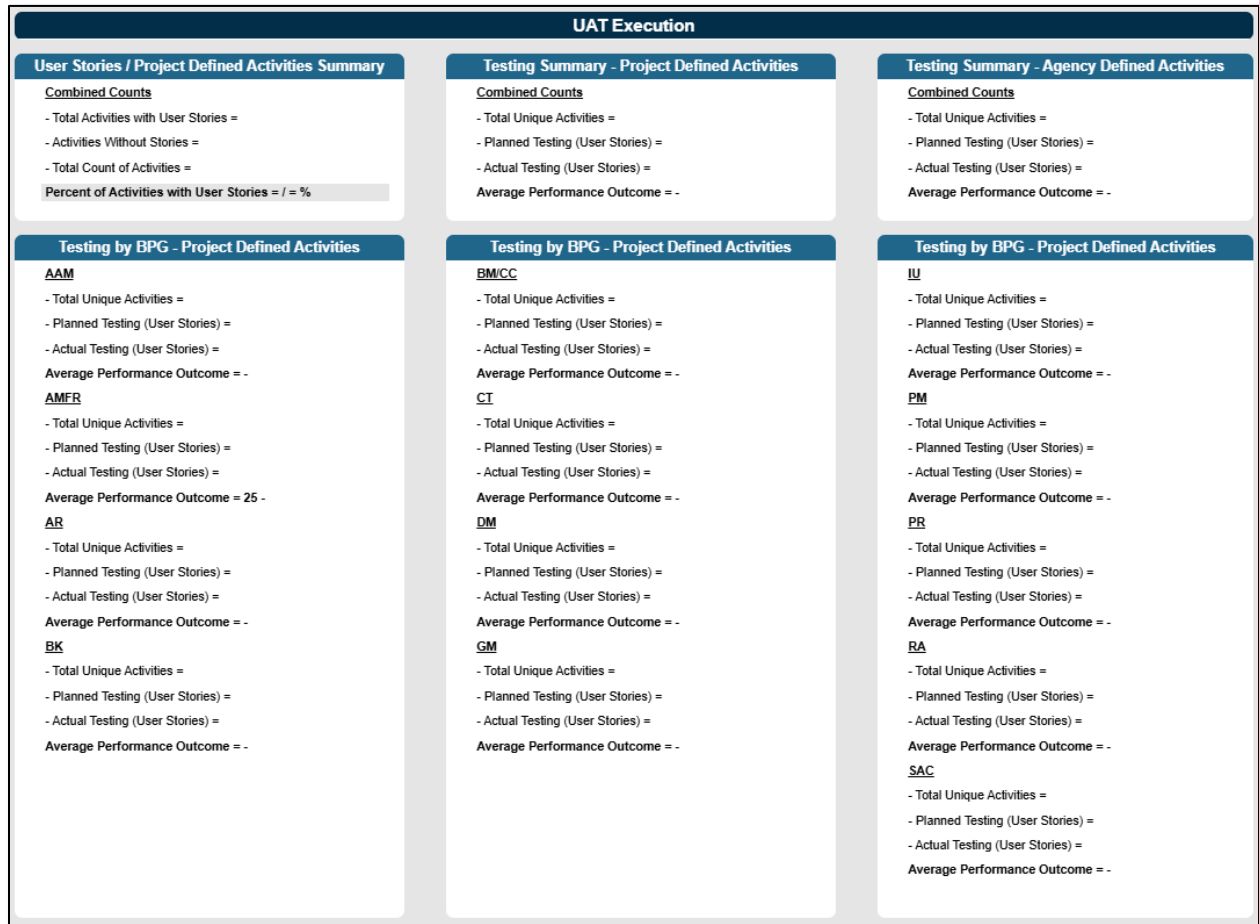


Figure 13: UAT Execution section (Panel 1)

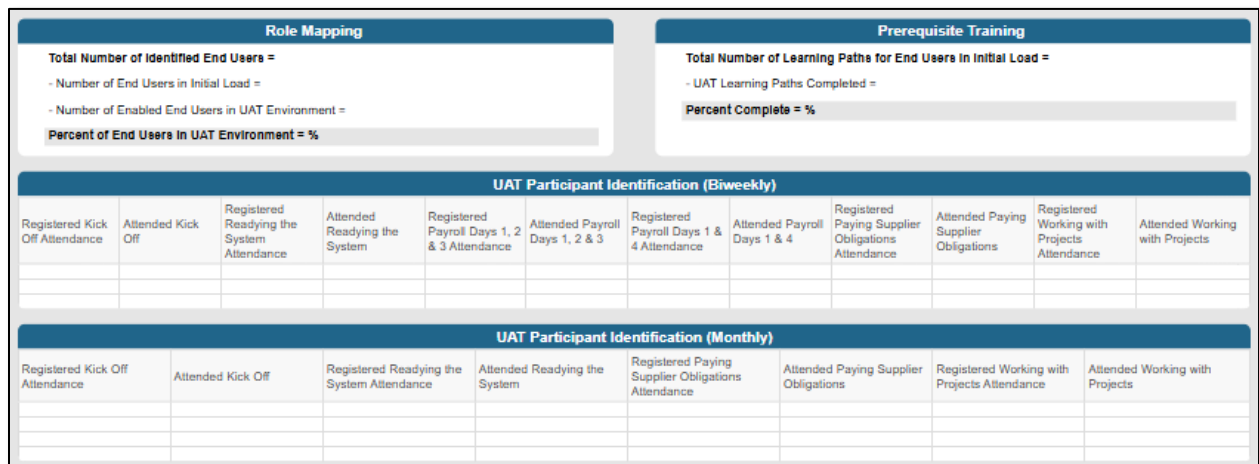


Figure 14: UAT Execution section (Panel 2)

## User Stories / Project Defined Activities Summary

This section is intended to show how many project defined activities are applicable for your agency and the number of applicable activities that your agency plans to test based on the development of at least one user story.

The User Stories / Project Defined Activities Summary (Figure 15) section displays:

- a count of all unique project defined activities with at least one user story,
- a count of all unique activities that do not have any user stories,
- a total count of all unique activities your agency will perform (i.e., has a user story and is not marked as not applicable for your agency), and
- the percentage of applicable activities for your agency that have user stories.

This data is being pulled from your <Agency> *User Story Activity Coverage* worksheet and includes only activities that are Project-defined, not agency defined.

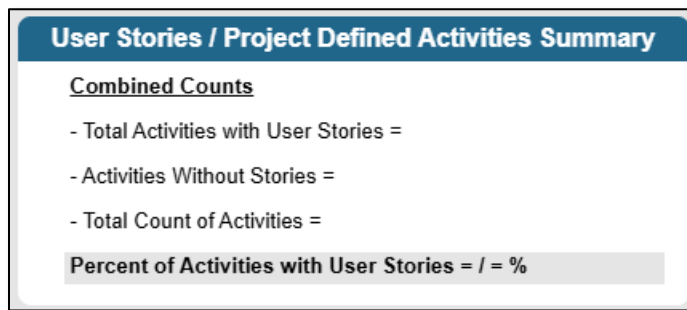


Figure 15: User Story Activity Summary

Review the [User Story Activity Coverage Supplemental](#) to learn more on how to complete this section.

## Testing Summary – Project Defined Activities

The All Activities Summary (Figure 16) section displays an overall combined count of all unique Project-defined activities, planned and actual testing that occurred, and the average performance outcome for the month maintained in either your <Agency> *Change Analysis* worksheets or <Agency> *User Story Inventory* worksheet, depending on your agency’s User Story Inventory option selection.

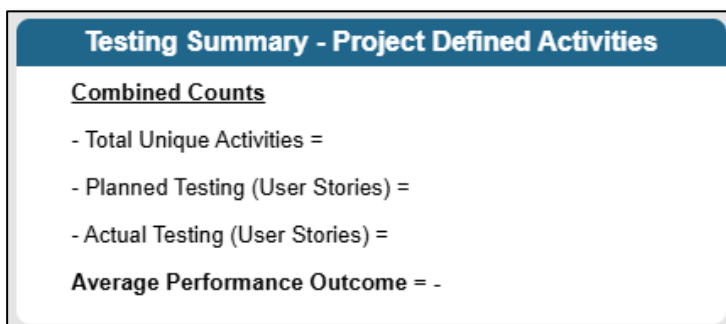


Figure 16: Overall UAT Testing Progress Report

- *Total Unique Activities* indicates the total count of all unique activities across BPGs.
- *Planned Testing (User Stories)* indicates the total count of all planned tests for the month across all BPGs.
- *Actual Testing (User Stories)* indicates the total count of all tests that occurred during the month across all BPGs.
- *Average Performance Outcome* shows an overall score that averages all the values of the Performance Outcome column selections, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 3 for details.

Table 3: UAT Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

\*The Performance Outcome column is found in either your <Agency> *Change Analysis* worksheets or your <Agency> *User Story Inventory* worksheet, depending on your agency's User Story Inventory option selection.

Review either the [User Story Inventory for Progress Reporting Supplemental](#) or the [Change Analysis Tool for Progress Reporting Supplemental](#) to learn more on how to complete this section.

### Testing Summary – Agency Defined Activities

Testing Summary – Agency Defined Activities is an optional selection used to track test scenarios that do not align with an activity on the Florida PALM Topics and Activities list. These values are only included in the Agency Defined portion of the dashboard and are not included in the combined counts for BPGs.

The Testing Summary – Agency Defined Activities (Figure 17) section displays a total count of all Agency Defined unique activities, planned and actual testing that occurred, and the average performance outcome for the month, maintained in either your <Agency> *Change Analysis* worksheets or <Agency> *User Story Inventory* worksheet depending on your agency's User Story Inventory option selection.

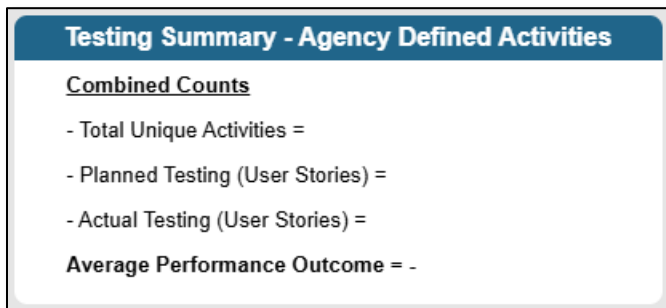


Figure 17: Agency Defined Testing Progress Report

- *Total Unique Activities* indicates the total count of all unique, agency-defined activities.
- *Planned Testing (User Stories)* indicates the total count of planned tests of all agency-defined activities for the month.
- *Actual Testing (User Stories)* indicates the total count of completed tests of agency-defined activities for the month.
- *Average Performance Outcome* averages all the values of the Performance Outcome column selections to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 4 for details.

Table 4: Agency Defined Average Performance Outcome Assigned Values

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

\*The Performance Outcome column is found in either your <Agency> *Change Analysis* worksheets or your <Agency> *User Story Inventory* worksheet, depending on your agency’s User Story Inventory option selection.

Review either the [User Story Inventory for Progress Reporting Supplemental](#) or the [Change Analysis Tool for Progress Reporting Supplemental](#).

### Testing by BPG – Project Defined Activities

The Testing by BPG – Project Defined Activities (Figure 18) section displays total counts of unique Project-defined activities, planned and actual testing that occurred, and the average performance outcome for the month for each BPG, maintained in either your <Agency> *Change Analysis* worksheets or <Agency> *User Story Inventory* worksheet depending on your agency’s User Story Inventory option selection.

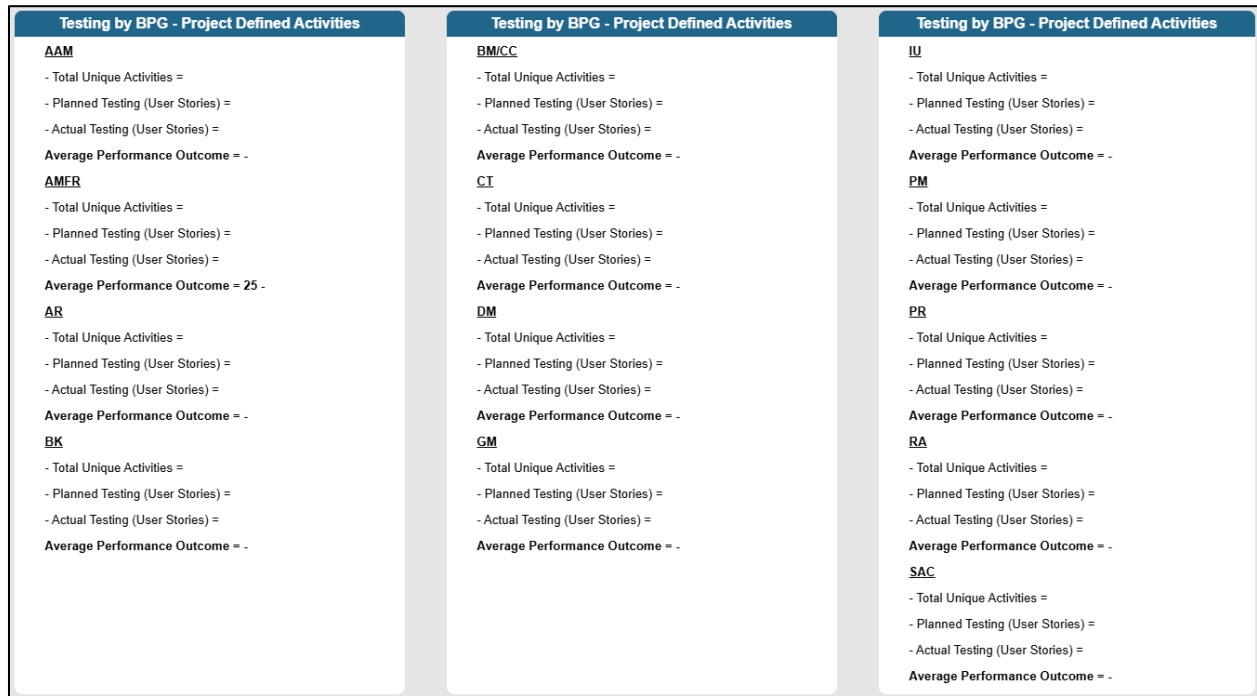


Figure 18: User Story Testing Progress

- **Total Unique Activities** indicates the total count of all unique activities, per BPG.
- **Planned Testing (User Stories)** indicates the total count of all planned tests for the month, per BPG.
- **Actual Testing (User Stories)** indicates the total count of all tests that occurred during the month, per BPG.
- **Average Performance Outcome** averages all the values of the Performance Outcome column selections to get an overall score, and pairs it with a rating of "Above Expectations, Satisfactory, or Inadequate" along with a color indicator. See Table 5 for details.

Table 5: Average Performance Outcome averages.

Performance Outcome*	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

\*The Performance Outcome column is found in either your <Agency> *Change Analysis* worksheets or your <Agency> *User Story Inventory* worksheet, depending on your agency's User Story Inventory option selection.

Review either the User Story Supplemental or the Change Analysis Supplemental to learn more on how to complete this section.

## Role Mapping

The Role Mapping (Figure 19) section displays the total number of identified end users, end users included in the Initial Load for the start of UAT, and end users that are currently enabled in the UAT environment. This data is pulled from your <Agency> *Role Mapping* worksheet.

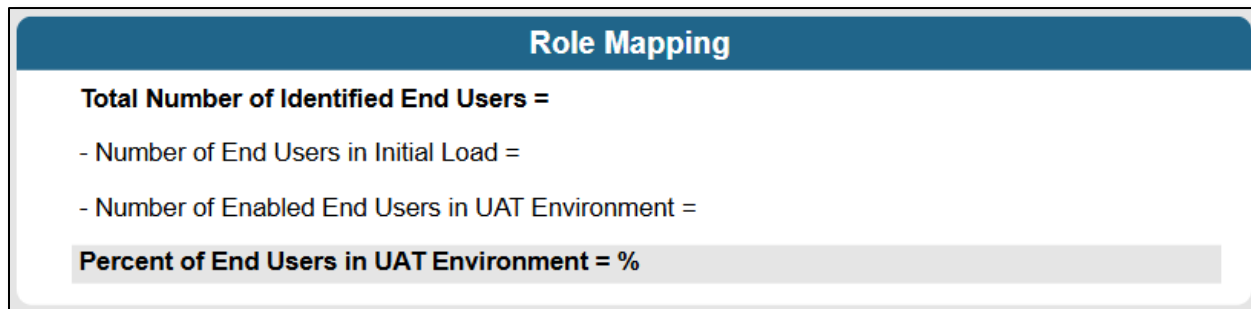


Figure 19: Role Mapping section

- *Total Number of Identified End Users* indicates the complete count of end users that your agency has listed.
- *Number of End Users in Initial Load* indicates the count of end users that were in the initial end user load for the start of All Agency UAT. This amount will not change from month to month.
- *Number of Enabled End Users in UAT Environment* indicates the count of enabled end users in the current UAT environment. This number reflects the users marked “Enabled in UAT Environment”, in your Role Mapping worksheet.
- *Percent of End Users in UAT Environment* indicates the percentage of end users that are currently enabled in the UAT environment compared to total end users (Number of End Users in UAT Environment / Total Number of Identified End Users).

The “Enabled in UAT Environment” in your <Agency> *Role Mapping* worksheet is used to track testers who are enabled in UAT through the duration of UAT, users may be added and/or removed by your IdP SME and SAMs. As access changes are made in UAT, those updates should also be made in the <Agency> *Role Mapping* worksheet.

## Prerequisite Training

The Prerequisite Training (Figure 20) section displays total number of required UAT prerequisite learning paths to be completed by your initial UAT participants and the number of UAT prerequisite learning paths that your initial UAT participants have completed, maintained in your <Agency> *Prerequisite Tracking* worksheet.

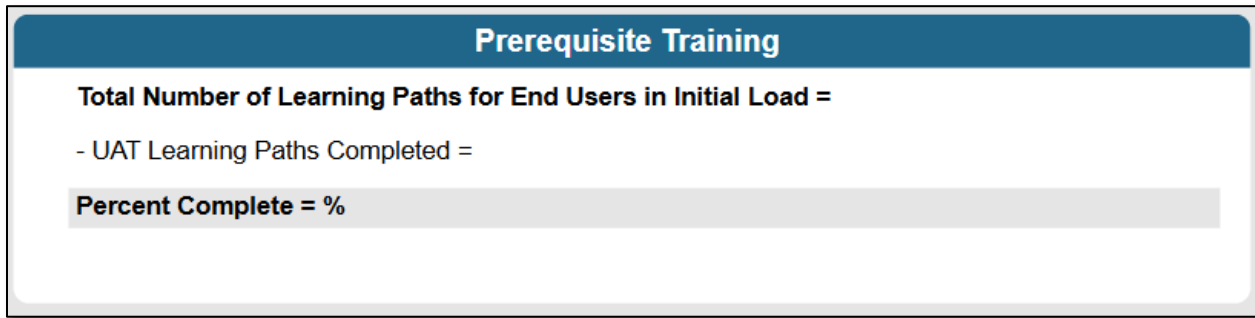


Figure 20: Prerequisite Training section

- *Total Number of Learning Paths for End Users in Initial Load* indicates the complete count of required UAT prerequisite learning paths for all initial load UAT end users based on their role assignment in your <Agency> *Role Mapping* worksheet.
- *UAT Learning Paths Completed* indicates the count of completed UAT prerequisite learning paths for all initial load UAT end users based on their role assignment in your <Agency> *Role Mapping* worksheet.
- *Percent Complete* indicates the completion percentage of required UAT prerequisite learning paths for all initial load UAT end users based on their role assignment (UAT Learning Paths Completed / Total Required UAT Learning Paths).

### UAT Participation Identification

The UAT Participation Identification (Figure 21) report displays a summary of your agency’s UAT attendance for the month. The report lists the count of registered and attended end users for each UAT session that occurring during the month. This report is fed from the <Agency> *UAT Participation Identification Report*, which is maintained by the Project. Clicking on the report view will take you to a full report of your agency’s UAT registration and attendance for all sessions.

UAT Participant Identification (Biweekly)											
Registered Kick Off Attendance	Attended Kick Off	Registered Readyng the System Attendance	Attended Readyng the System	Registered Payroll Days 1, 2 & 3 Attendance	Attended Payroll Days 1, 2 & 3	Registered Payroll Days 1 & 4 Attendance	Attended Payroll Days 1 & 4	Registered Paying Supplier Obligations Attendance	Attended Paying Supplier Obligations	Registered Working with Projects Attendance	Attended Working with Projects

UAT Participant Identification (Monthly)							
Registered Kick Off Attendance	Attended Kick Off	Registered Readyng the System Attendance	Attended Readyng the System	Registered Paying Supplier Obligations Attendance	Attended Paying Supplier Obligations	Registered Working with Projects Attendance	Attended Working with Projects

Figure 21: UAT Participation Report

### Agency and Data Readiness Section

The Conversion and Data Readiness section (Figure 22) is designed to help you understand your agency’s current data readiness progress and status.

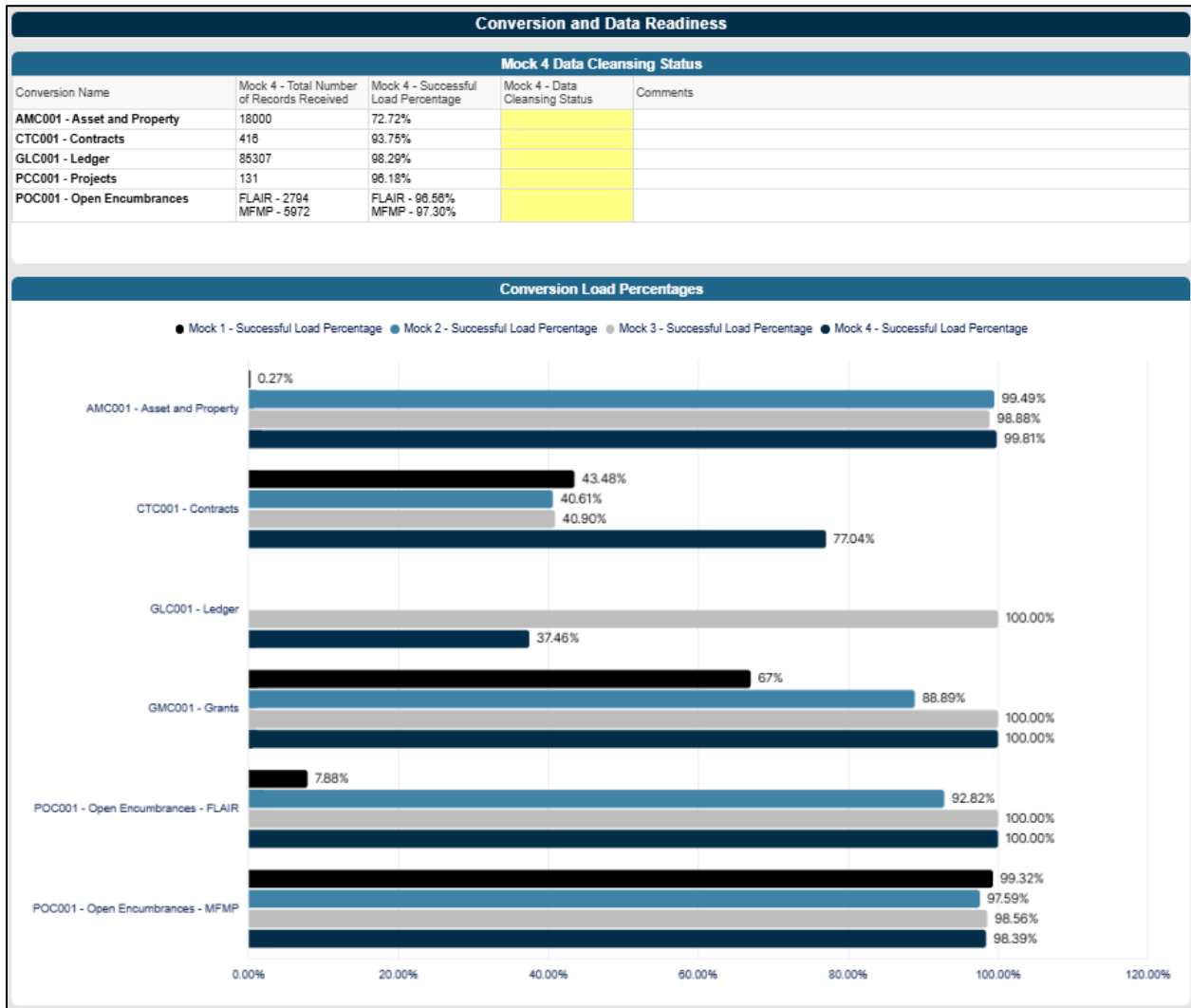


Figure 22: Conversion and Data Readiness Section

### Mock 4 Data Cleansing Status

The Mock 4 Data Cleansing Status box (Figure 23) displays your agency’s data cleansing progress for Mock 4, maintained in your <Agency> *Mock Conversions* worksheet. The data shows the conversion name, the total number of records received from the source system for the Mock Conversion, the percentage of records that successfully loaded for the Mock Conversion, your agency’s reported status of data cleansing, and any comments related to your agency’s data cleansing progress.

- *In Progress* indicates your data cleansing efforts have begun.
- *Complete* indicates your data cleansing efforts are complete.
- *Not Applicable* indicates your agency has opted to not participate in the conversion.

Mock 4 Data Cleansing Status				
Conversion Name	Mock 4 - Total Number of Records Received	Mock 4 - Successful Load Percentage	Mock 4 - Data Cleansing Status	Comments
AMC001 - Asset and Property	18000	72.72%		
CTC001 - Contracts	416	93.75%		
GLC001 - Ledger	85307	98.29%		
PCC001 - Projects	131	96.18%		
POC001 - Open Encumbrances	FLAIR - 2794	FLAIR - 96.56%		
	MFMP - 5972	MFMP - 97.30%		

Figure 23: Mock 4 Data Cleansing Status

Review [RW Task 597 - Complete Data Cleansing Based on Mock Conversion 4](#) for instructions on completing the worksheet.

### Conversion Load Percentages

The Conversion Load Percentages box (Figure 24) displays the percentage of your agency's conversion records that successfully loaded in each Mock Conversion cycle, as shown in your <Agency> Mock Conversions worksheet.

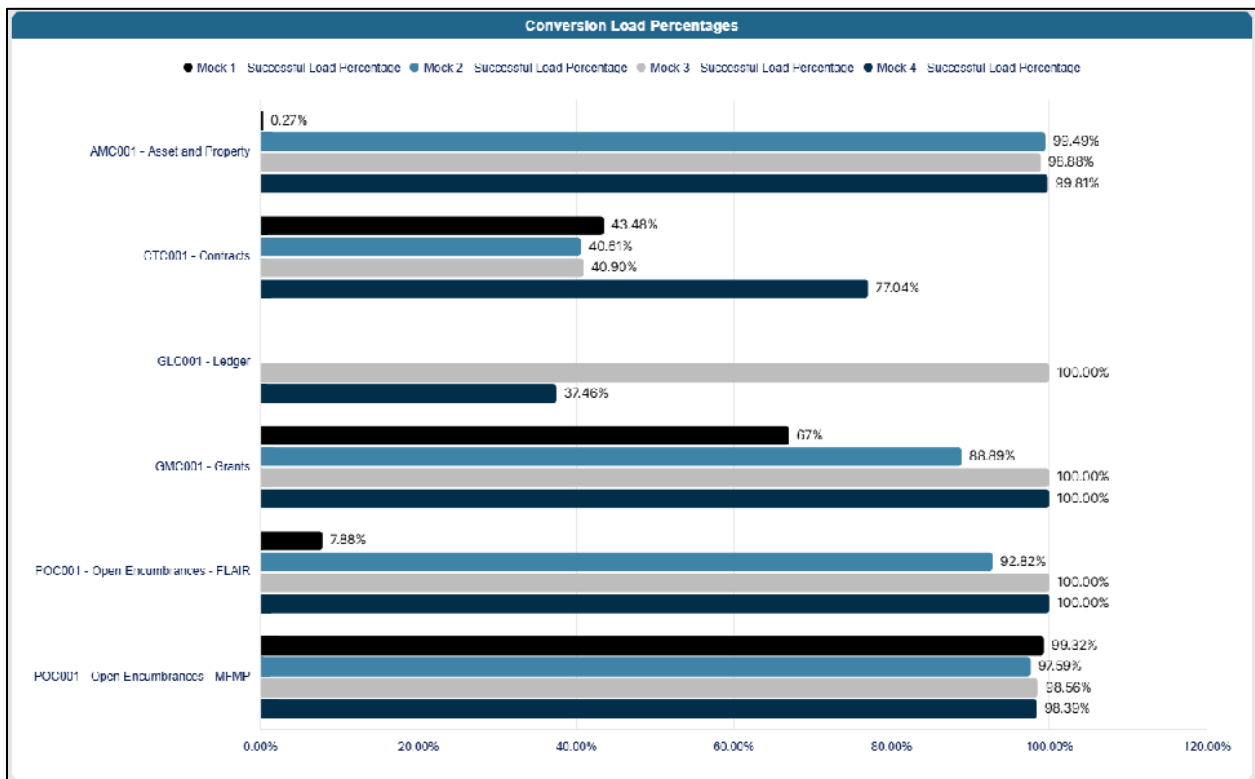


Figure 24: Conversion Load Percentages Section

**NOTE:** A load percentage for GLC001 is only available for Mock Conversions 3 & 4. GLC001 – Ledger was not run in Mock Conversion 1, and a load percentage was not provided to agencies for Mock Conversion 2 due to the data fixes that were implemented by the Project.

## Worksheet Errors

The Worksheet Errors box (Figure 25) displays a total count of error messages listed in your agency's:

- combined configuration workbooks,
- combined conversion worksheets, and
- Role Mapping Worksheet.

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.*

Worksheet Errors	
<b>Error Messages</b>	
- Count of Configuration Worksheet Rows with Error Messages =	32
- Count of Conversion Worksheet Rows with Error Messages =	0
- Count of Role Mapping Worksheet Rows with Error Messages =	18
- Count of All Worksheet Rows with Error Messages =	50

Figure 25: Worksheet Errors

## Submission Section

The Submission section (Figure 26) includes a form for your Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

Submission															
<p><b>Agency Sponsor Confirmation</b></p> <p>As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's progress testing report. I have reviewed and confirmed the accuracy of my agency's readiness and testing status as reflected in this dashboard.</p> <p>Agency Sponsor Name: *</p> <input type="text"/> <p><input type="checkbox"/> Confirm *</p> <p><input type="button" value="Submit"/></p> <p><a href="#">Privacy Policy</a>   <a href="#">Report Abuse</a></p>		<p><b>DEMO Progress Report Confirmation</b></p> <table border="1"> <thead> <tr> <th>Reporting Period</th> <th>Agency Sponsor Name:</th> <th>Confirmed By:</th> <th>Confirmation Date:</th> </tr> </thead> <tbody> <tr> <td>February 2026</td> <td>Steven Fielder</td> <td>floridapalm@myfloridacfo.com</td> <td>02/24/26</td> </tr> <tr> <td>January 2026</td> <td>Steven Fielder</td> <td>floridapalm@myfloridacfo.com</td> <td>01/26/26</td> </tr> </tbody> </table>		Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:	February 2026	Steven Fielder	floridapalm@myfloridacfo.com	02/24/26	January 2026	Steven Fielder	floridapalm@myfloridacfo.com	01/26/26
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January 2026	Steven Fielder	floridapalm@myfloridacfo.com	01/26/26												

Figure 26: Submission Section

## Agency Sponsor Confirmation

The Agency Sponsor Confirmation section (Figure 27) allows for easy submission of the Monthly Progress report. For each reporting period, Primary or Backup Agency Sponsors must review all Dashboard information and provide confirmation that the data represented is accurate.

**NOTE:** This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration.

**Agency Sponsor Confirmation**

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's progress testing report. I have reviewed and confirmed the accuracy of my agency's readiness and testing status as reflected in this dashboard.

Agency Sponsor Name: \*

Confirm \*

Submit

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Figure 27: Agency Sponsor Confirmation

### Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation section (Figure 28).

DEMO Progress Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
February 2026	Steven Fielder	floridapalm@myfloridacfo.com	02/24/26
January 2026	Steven Fielder	floridapalm@myfloridacfo.com	01/26/26

Figure 28: Agency Sponsor Confirmation Report