

Dashboard Overview

A <Agency> Monthly Progress Report dashboard (example shown below in Figures 1, 2 and 3) 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 reported testing activity and data readiness progress and serves as the tool for your Primary Agency Sponsor to confirm and submit your agency's progress each month.

The <Agency> Monthly Progress Report dashboard for September 2025 is designed to allow agencies to confirm progress of interface testing and data readiness activities. The dashboard is expected to evolve over time to display relevant data and metrics related to activities including participation in UAT, full integration testing, training, and cutover.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

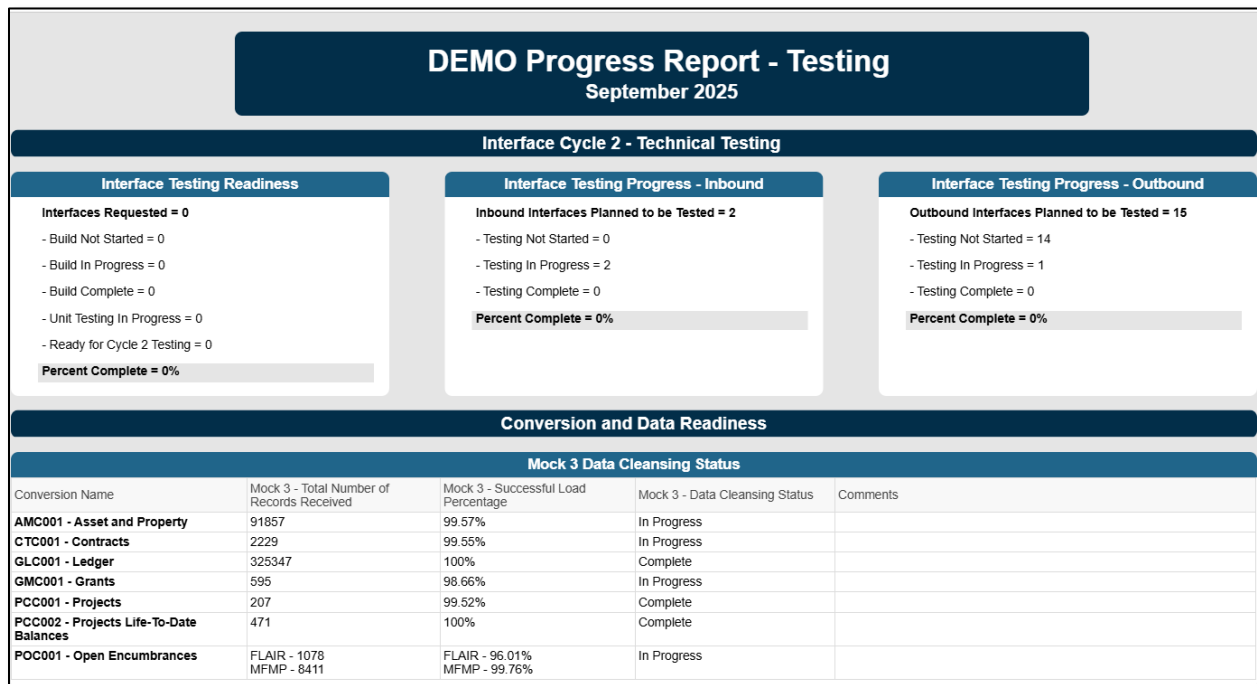


Figure 1: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 1)

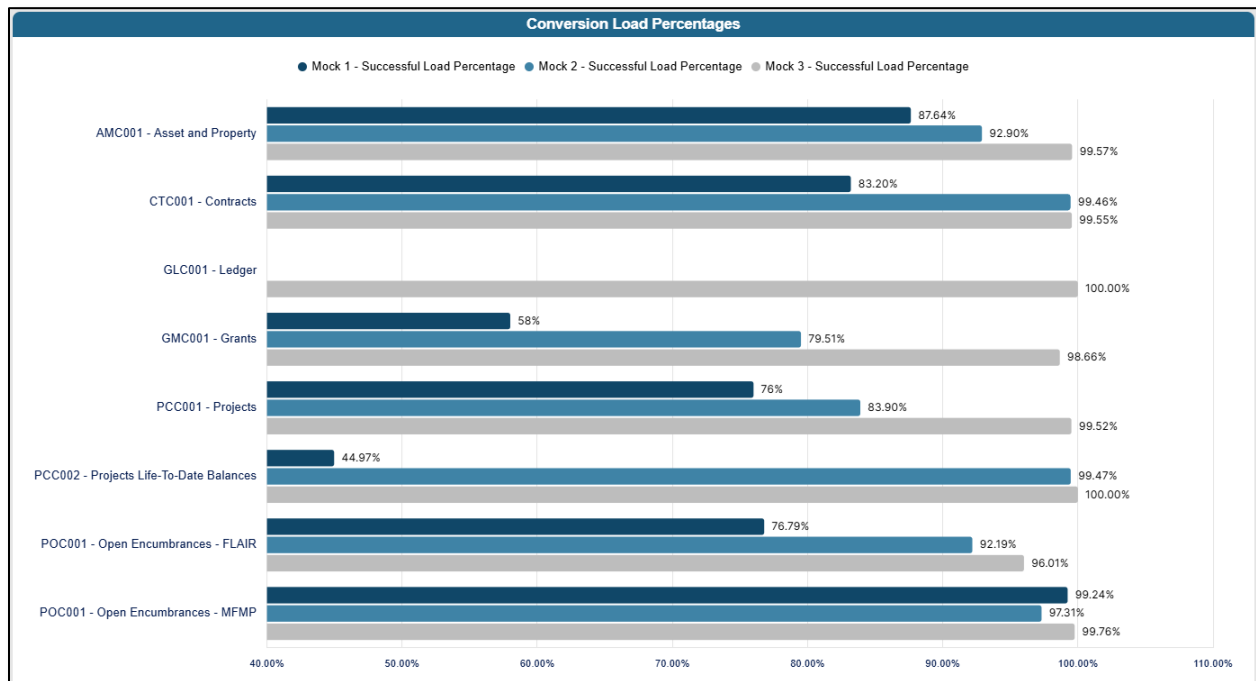


Figure 2: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 2)

Submission

Primary 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 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: |
| August 2025 | John Smith | floridapalm@myfloridacfo.com | 07/30/25 |

Figure 3: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 3)

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

- <Agency> Cycle 2 Technical Interface Testing
- <Agency> Interface Test Planning
- <Agency> Mock Conversions

Interface Cycle 2 - Technical Testing Section

The Interface Cycle 2 - Technical Testing section (Figure 4) is designed to help you understand your agency's current interface testing progress and status.

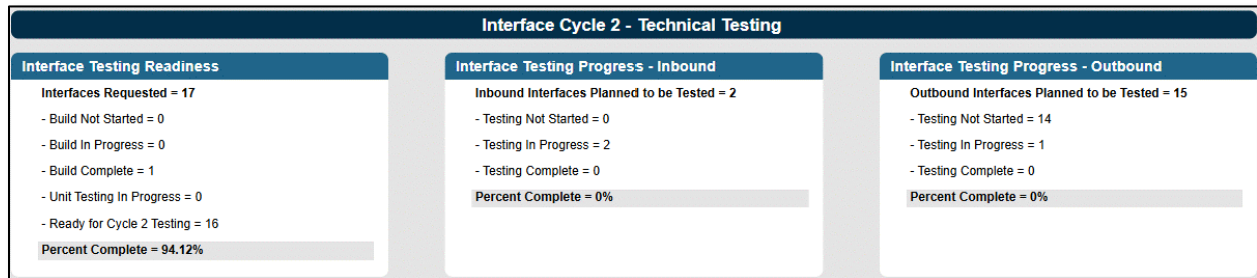


Figure 4: Interface Cycle 2 - Technical Testing Section

Interface Testing Readiness

The Interface Testing Readiness box (Figure 5) displays your agency's Interface Cycle 2 - Technical Testing readiness progress maintained in your <Agency> *Interface Test Planning* worksheet. The data shows the count of interfaces requested by your agency and the agency-reported Cycle 2 Test Readiness status for those interfaces. The percent complete calculates the percentage of interfaces that are ready to be tested (Ready for Cycle 2 Testing / Interfaces Requested).

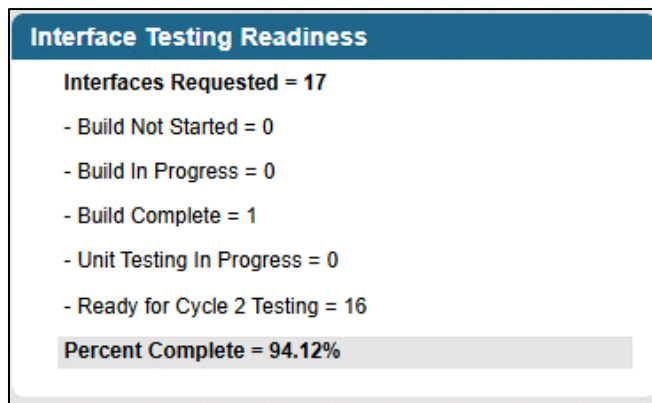


Figure 5: Interface Testing Readiness Section

Interface Testing Progress – Inbound/Outbound

The Interface Testing Progress - Inbound/Outbound boxes (Figure 6) display, grouped by the direction of the interface, status of interfaces tested. The data displays your agency's interface testing progress 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).

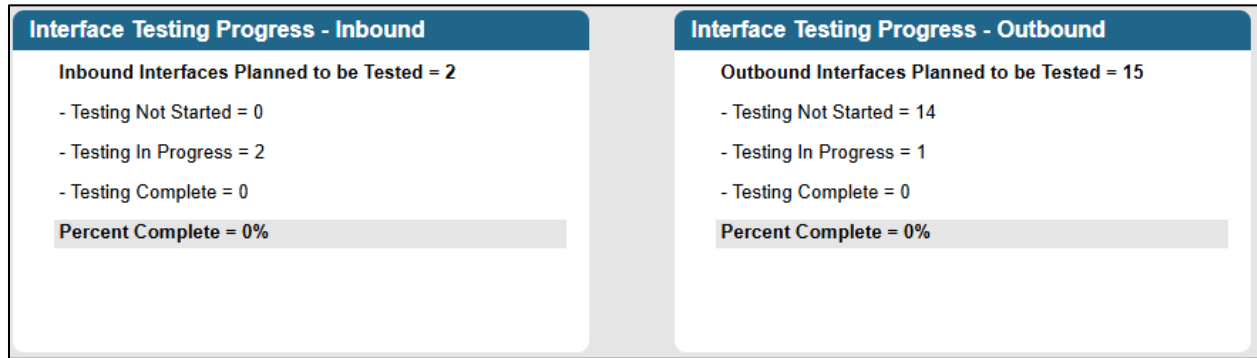


Figure 6: Inbound/Outbound Interface Testing Section

NOTE: The following agencies with no planned interfaces will not have an Interface Cycle 2 - Technical Testing Section: DOEA, DOS, EOG, FSDB, and PSC.

Conversion and Data Readiness Section

The Data Readiness section (Figure 7) is designed to help you understand your agency's current data readiness progress and status.

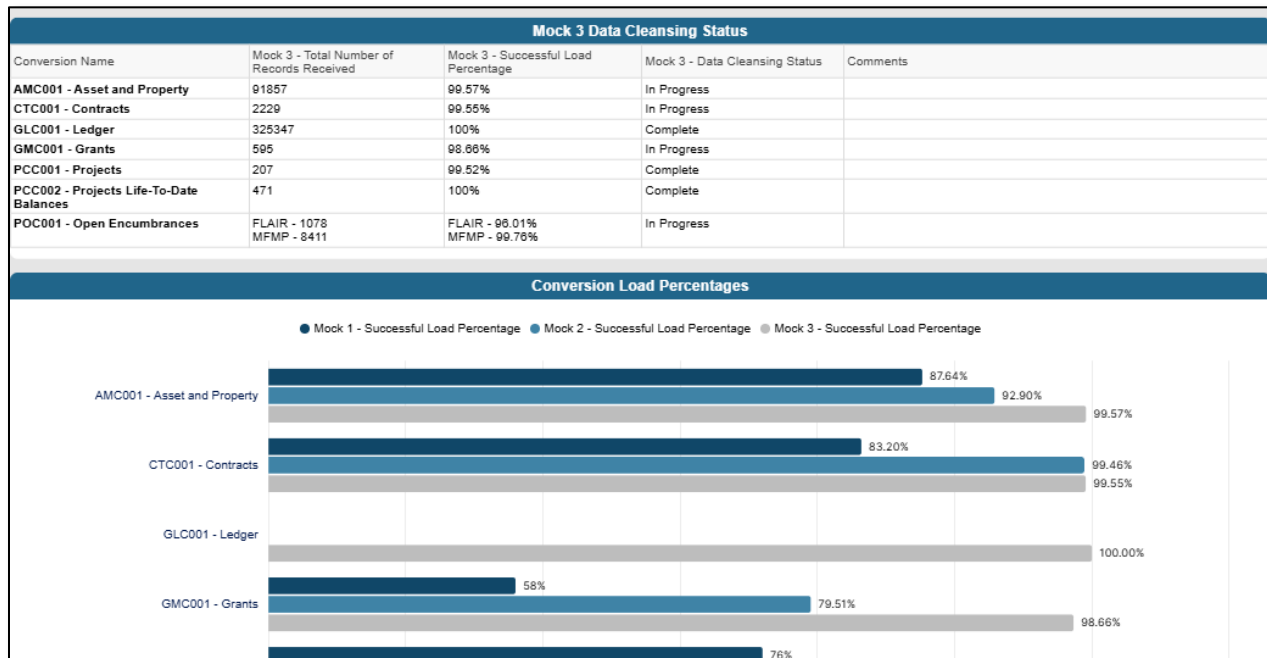


Figure 7: Data Readiness section

Mock 3 Data Cleansing Status

The Mock 3 Data Cleansing Status box (Figure 8) displays your agency's data cleansing progress for Mock 3, 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.

| Mock 3 Data Cleansing Status | | | | |
|---|---|-------------------------------------|--------------------------------|----------|
| Conversion Name | Mock 3 - Total Number of Records Received | Mock 3 - Successful Load Percentage | Mock 3 - Data Cleansing Status | Comments |
| AMC001 - Asset and Property | 91857 | 99.57% | In Progress | |
| CTC001 - Contracts | 2229 | 99.55% | In Progress | |
| GLC001 - Ledger | 325347 | 100% | Complete | |
| GMC001 - Grants | 595 | 98.66% | In Progress | |
| PCC001 - Projects | 207 | 99.52% | Complete | |
| PCC002 - Projects Life-To-Date Balances | 471 | 100% | Complete | |
| POC001 - Open Encumbrances | FLAIR - 1078 MFMP - 8411 | FLAIR - 96.01% MFMP - 99.76% | In Progress | |

Figure 8: Mock 3 Data Cleansing Status

NOTE: If a Conversion is 'Not Applicable' to your agency, it will not be visible on the dashboard.

Conversion Load Percentages

The Conversion Load Percentages box (Figure 9) 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.

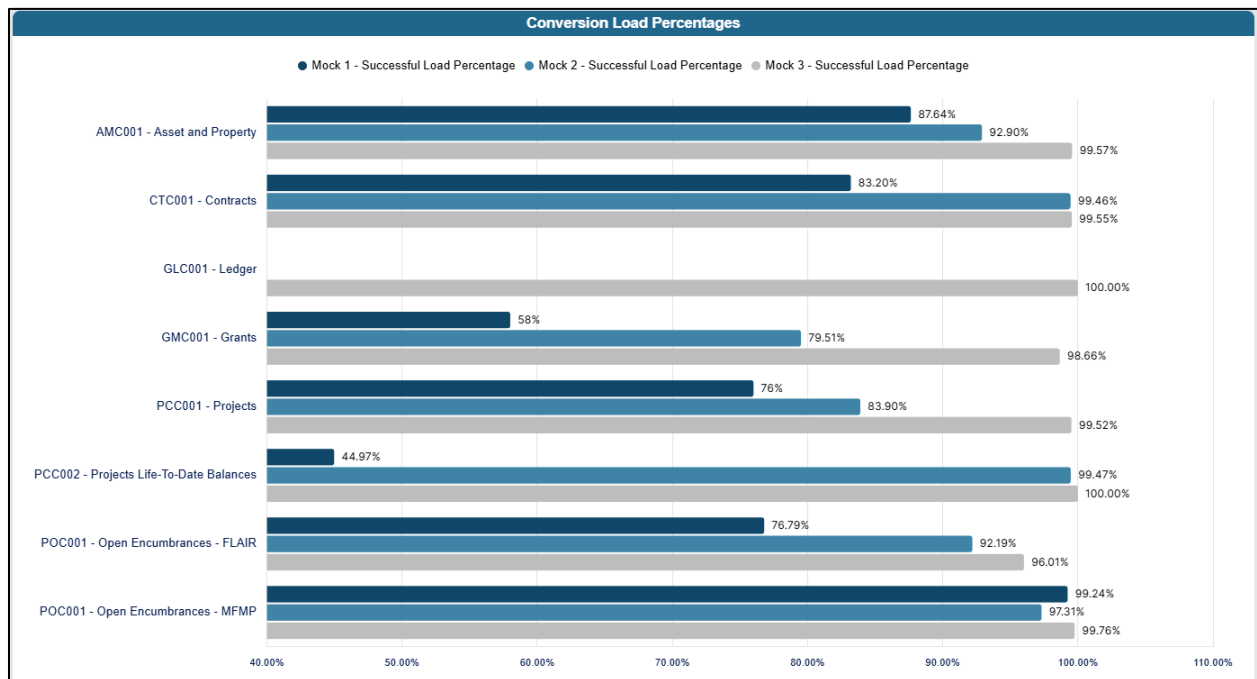


Figure 9: Conversion Load Percentages Section

NOTE: A load percentage for GLC001 is only available for Mock Conversion 3. 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.

Submission Section

The Submission Section (Figure 10) includes a form for your Primary Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

Submission

Primary 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 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: |
|------------------|----------------------|------------------------------|--------------------|
| August 2025 | John Smith | floridapalm@myfloridacto.com | 07/30/25 |

Figure 10: Submission Section

Primary Agency Sponsor Confirmation

The Primary Agency Sponsor Confirmation (Figure 11) allows for easy submission of the Monthly Progress report. The confirmation should only be submitted by the Primary Agency Sponsor.

NOTE: This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Primary Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration. The confirmation form will be enabled to allow submission no earlier than five business days before the task is due and will close promptly the business day after the task is due.

Primary Agency Sponsor Confirmation

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Agency Sponsor Name: *

☐ Confirm *

Submit

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Figure 11: Agency Primary Sponsor Confirmation

Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation box (Figure 12).

| DEMO Progress Report Confirmation | | | |
|-----------------------------------|----------------------|------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| August 2025 | John Smith | floridapalm@myfloridacfo.com | 07/30/25 |
| | | | |

Figure 12: Agency Sponsor Confirmation Report