

Dashboard Overview

A <Agency> Monthly Progress Report dashboard (example shown below in Figures 1 and 2) 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 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 data readiness 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, training, and cutover.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

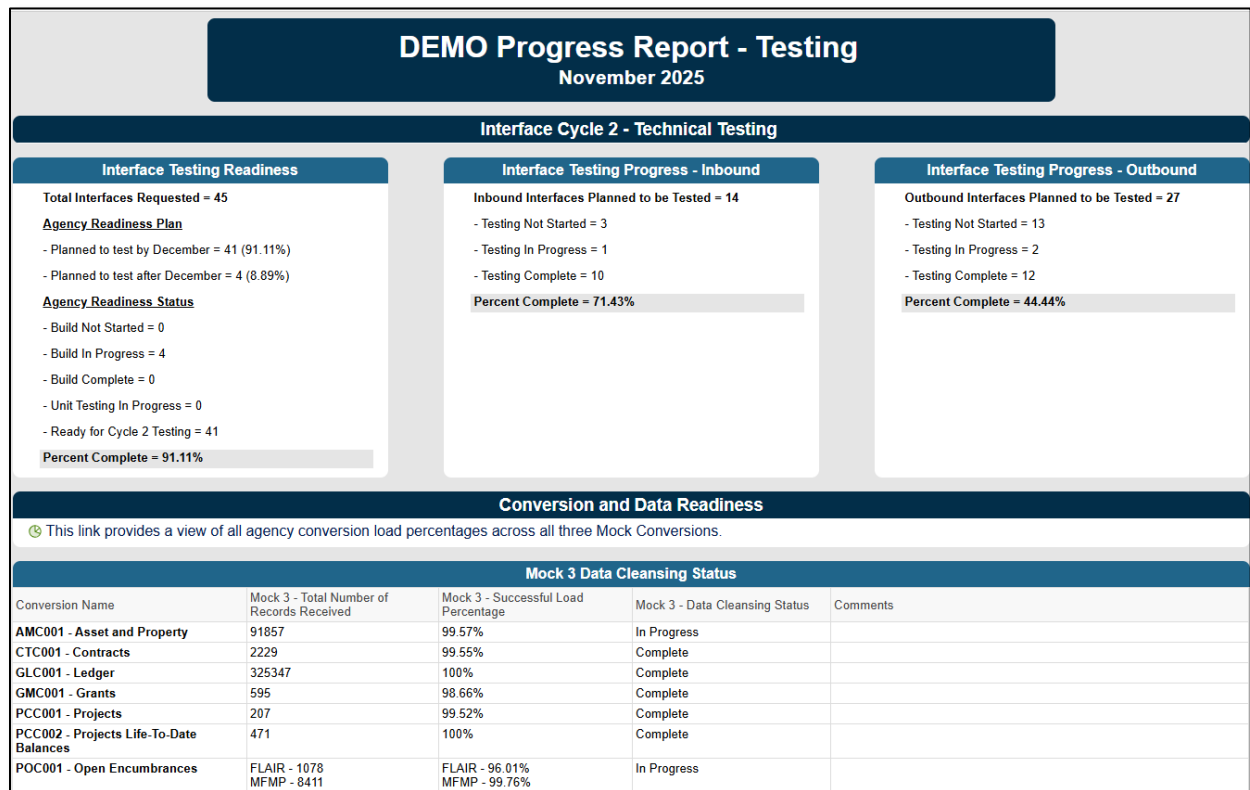


Figure 1: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 1)

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 status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

Submit

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DEMO Progress Report Confirmation

Reporting Period	Agency Sponsor Name	Confirmed By	Confirmation Date

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

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 3) is designed to help you understand your agency's current interface testing progress and status.

Interface Cycle 2 - Technical Testing

Interface Testing Readiness

Total Interfaces Requested = 45

Agency Readiness Plan

- Planned to test by December = 41 (91.11%)
- Planned to test after December = 4 (8.89%)

Agency Readiness Status

- Build Not Started = 0
- Build In Progress = 4
- Build Complete = 0
- Unit Testing In Progress = 0
- Ready for Cycle 2 Testing = 41

Percent Complete = 91.11%

Interface Testing Progress - Inbound

Inbound Interfaces Planned to be Tested = 14

- Testing Not Started = 3
- Testing In Progress = 1
- Testing Complete = 10

Percent Complete = 71.43%

Interface Testing Progress - Outbound

Outbound Interfaces Planned to be Tested = 27

- Testing Not Started = 13
- Testing In Progress = 2
- Testing Complete = 12

Percent Complete = 44.44%

Figure 3: Interface Cycle 2 - Technical Testing Section

Interface Testing Readiness

The Interface Testing Readiness section (Figure 4) displays your agency's Interface Cycle 2 – Technical Testing readiness plans and readiness progress maintained in your <Agency> Interface Test Planning worksheet. The Interface Testing Readiness section includes:

- The total number of interfaces requested by your agency

- The Agency Readiness Plan data, showing:
 - o The number of interfaces your agency planned to be ready for testing by December and the related percentage (planned to test by December/ total number interfaces requested)
 - o The number of interfaces your agency planned to be ready for testing after December and the related percentage (planned to test after December / total number interfaces requested)
- The Agency Readiness Status data, showing:
 - o The agency-reported Cycle 2 Test Readiness status for all requested interfaces
 - o The percent complete calculates the percentage of interfaces that are ready to be tested (Ready for Cycle 2 Testing / Interfaces Requested)

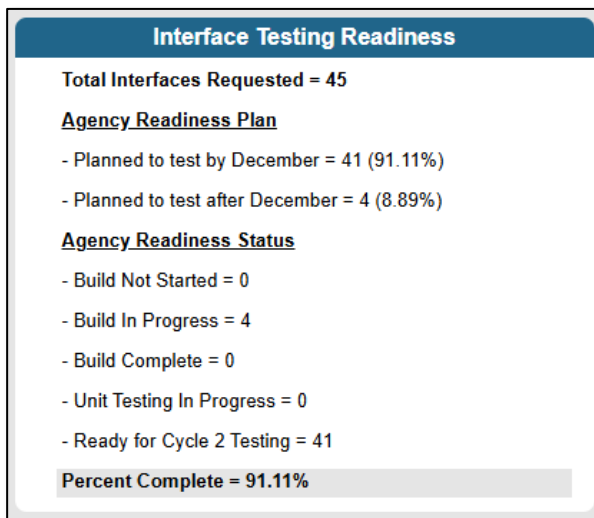


Figure 4: Interface Testing Readiness Section

Interface Test Planning Worksheet Updates

Your <Agency> *Interface Test Planning* worksheet has been updated to align with the extension of Interface Cycle 2 – Technical Interface Testing.

- Rows have been locked from editing if the selection in the “Cycle 2 Test Readiness Status” column is ‘Ready for Cycle 2 Testing’. No further action is required.
- Drop-down options in the “When will you be ready for Cycle 2 Testing?” column have been updated. Select the appropriate option for interfaces that were not ready to test by October 2025. Options include:
 - o No Longer Needed
 - o November 2025
 - o December 2025
 - o Other Date
 - If ‘Other Date’ is selected, you must provide an expected testing readiness date in the “Comments” column. The column will remain yellow until a comment is provided.

You must continue to maintain the “Cycle 2 Test Readiness Status” field for any interfaces that are still in build or unit testing progress. Conditional formatting has been added to apply red font in the “Cycle 2 Test Readiness Status” field if the selection for “When will you be ready for Cycle

2 Testing?" is in the past and the "Cycle 2 Test Readiness Status" is not 'Ready for Cycle 2 Testing'.

Interface Testing Progress – Inbound/Outbound

The Interface Testing Progress – Inbound/Outbound section (Figure 5) display, grouped by the direction of the interface (e.g., into Florida PALM, out from Florida PALM), the 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).

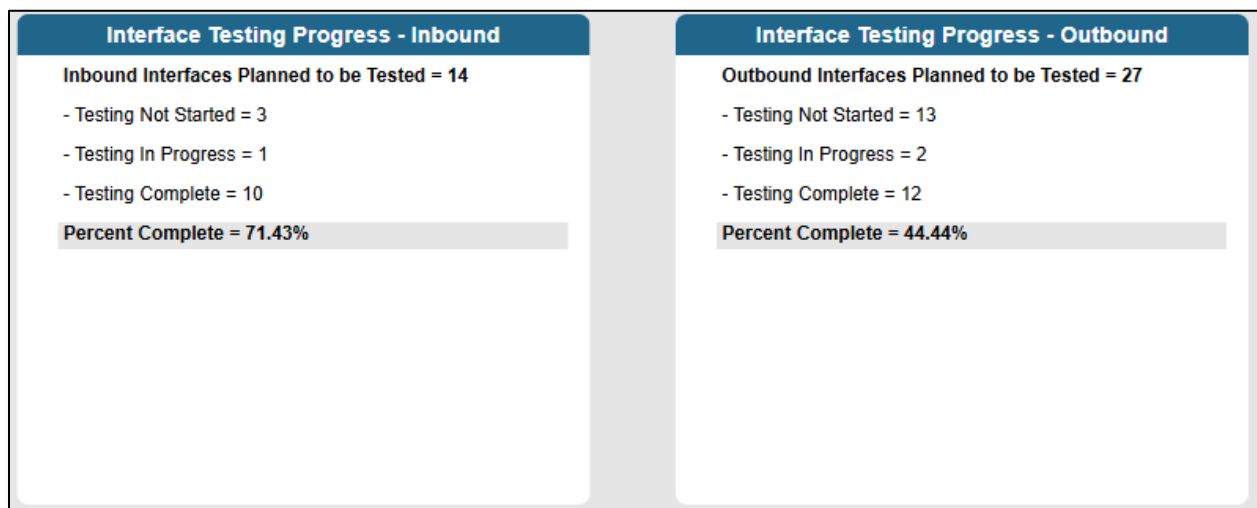


Figure 5: Inbound/Outbound Interface Testing Section

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 6) is designed to help you understand your agency's current data readiness progress and status.

Conversion and Data Readiness				
This link provides a view of all agency conversion load percentages across all three Mock Conversions.				
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%	Complete	
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 6: Data Readiness section

A link is provided (Figure 7) to a separate report that displays the percentage of all the agencies' conversion records that successfully loaded in each Mock Conversion cycle, as shown in agency's <Agency> Mock Conversions worksheets.

Conversion and Data Readiness				
This link provides a view of all agency conversion load percentages across all three Mock Conversions.				

Figure 7: Combined Agency 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.

Mock 3 Data Cleansing Status

The Mock 3 Data Cleansing Status section (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.

Submission Section

The Submission Section (Figure 9) includes a form for your Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

DEMO Progress Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
October 2025	Steven Fielder	floridapalm@myfloridacfo.com	10/28/25
September 2025	Steven Fielder	floridapalm@myfloridacfo.com	09/25/25
August 2025	Steven Fielder	floridapalm@myfloridacfo.com	08/27/25

Figure 9: Submission Section

Agency Sponsor Confirmation

The Agency Sponsor Confirmation section (Figure 10) 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. 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.

Figure 10: Agency Sponsor Confirmation

Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation section (Figure 11).

DEMO Progress Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
October 2025	Steven Fielder	floridapalm@myfloridacfo.com	10/28/25
September 2025	Steven Fielder	floridapalm@myfloridacfo.com	09/25/25
August 2025	Steven Fielder	floridapalm@myfloridacfo.com	08/27/25

Figure 11: Agency Sponsor Confirmation Report