

FloridaPALM

Planning, Accounting, and Ledger Management



Task Release Date	Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting data elements your agency currently uses and how they are being used.
01/17/23	325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how you currently manage data security and user access.
01/17/23	326	Technology	Complete Current Agency Business Systems	Review and update the current Agency Business Systems. Record the technical design for each system.
01/17/23	327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
01/17/23	328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
05/22/23	329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
05/22/23	330	People	Update Authorized Sheet Users	Review, update and confirm authorized users to all Florida TMS systems.
05/22/23	331	N/A	Submit Monthly Agency Report	Agency Sponsor to confirm and submit monthly report, in the Project, to the Florida Department of Financial Services. Agency to provide input on the report for the Agency's Project Manager.
09/11/23	500	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
09/11/23	501	People	Create Webinars Readiness Plan	Create a plan to identify and assess impacted stakeholders within the agency that includes agency specific tasks to successfully implement your agency.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

APRIL 25, 2024



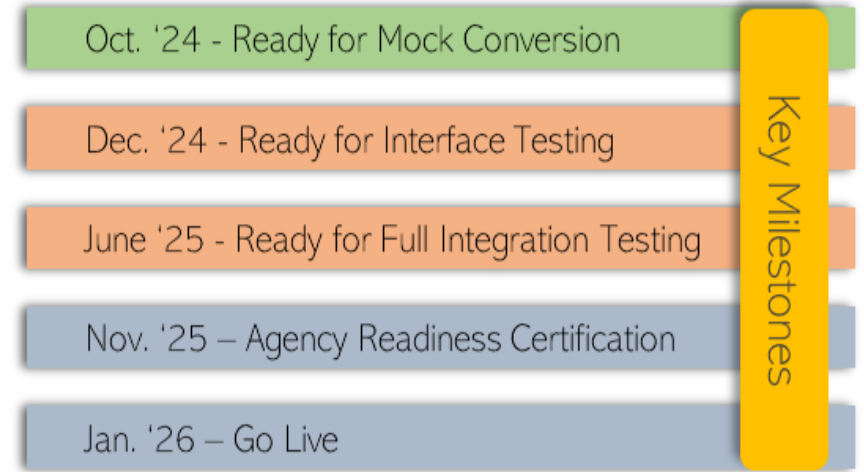
Agenda

- ▶ RW Tasks: Reaching Key Milestones
 - Tips to get caught up – Rinse and Repeat
- ▶ Mindful Task Management:
 - Prioritization Techniques for Overwhelmed Teams
- ▶ New Knowledge Center Resources
 - Demos, Finding Module Configurations



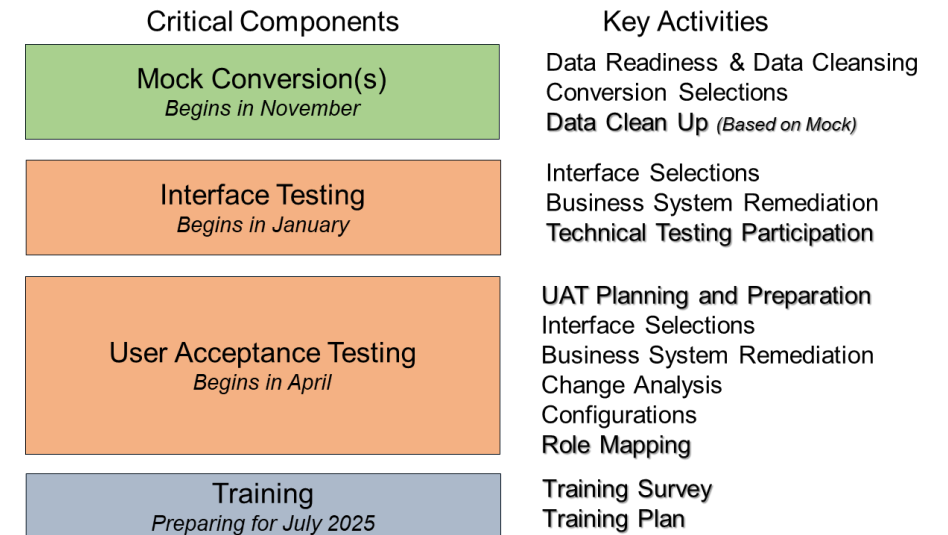
Fiscal Year 2024/2025

Critical Components	Key Activities
Mock Conversion(s) <i>Begins in November</i>	Data Readiness & Data Cleansing Conversion Selections Data Clean Up <i>(Based on Mock)</i>
Interface Testing <i>Begins in January</i>	Interface Selections Business System Remediation Technical Testing Participation
User Acceptance Testing <i>Begins in April</i>	UAT Planning and Preparation Interface Selections Business System Remediation Change Analysis Configurations Role Mapping
Training <i>Preparing for July 2025</i>	Training Survey Training Plan



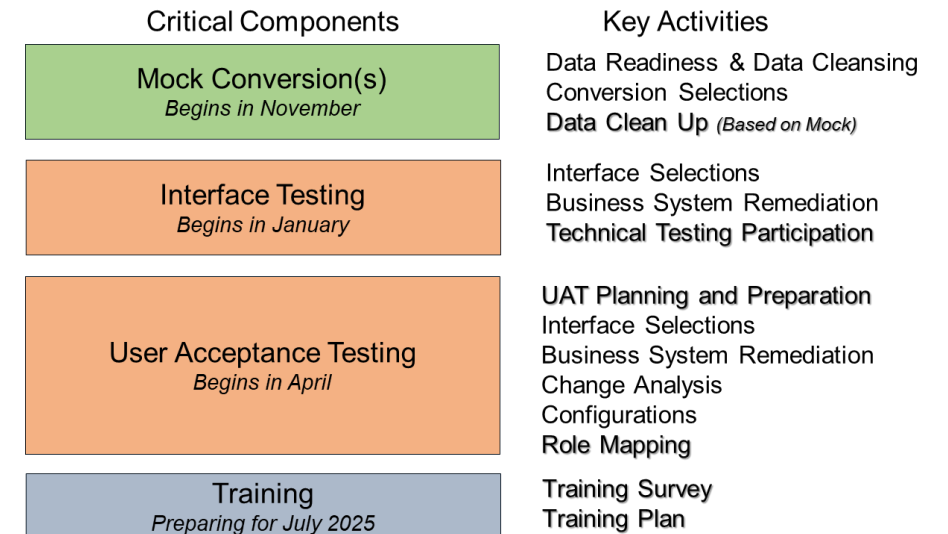
Current RW Tasks

RW Tasks in Progress
513 - Complete Configuration Workbooks for Segments I and II
519 - Remediate Agency Business Systems based on Segment I
522 - Manage Agency-specific Implementation Schedule, Risks and Issues
524 – Complete and Submit Florida PALM End User Readiness Survey Analysis
527 - Identify Change Impacts and Update Agency Business Process Documentation for Segment III
528 - Update Agency Business System Documentation for Segment III
530 - Update Florida PALM Interface Inventory for Segment III



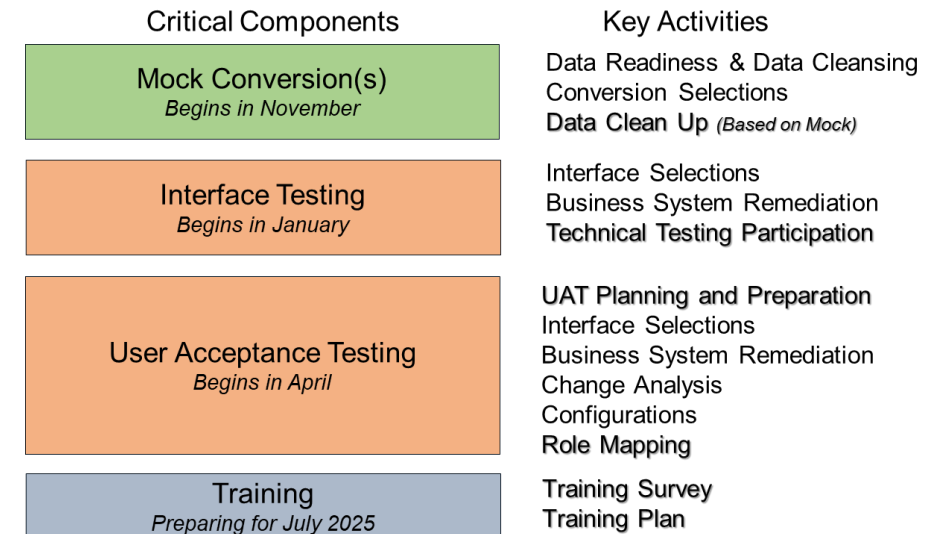
Upcoming RW Tasks

RW Tasks Releasing April/May/June
526 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment III
529 - Update Florida PALM Conversion Inventory for Segment III
531 – Remediate Agency Business Systems based on Segment II
532 - Submit Bimonthly Agency Readiness Status Report
533 - Manage Agency Specific Implementation Schedule, Risks and Issues
534 - Update CCN and Contacts
535 - Update Workforce Readiness Plan
536 - Create Agency Specific User Acceptance Testing Plan
537 - Update Authorized Smartsheet Users



Future RW Tasks

RW Tasks Releasing in July
538 - Submit Bimonthly Agency Readiness Status Report
539 - Manage Agency Specific Implementation Schedule, Risks and Issues
540 - Share Florida PALM Updates
541 - Complete Configuration Workbooks for Segment IV
542 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV
543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV
544 - Update Agency Business System Documentation for Segment IV
545 - Update and Finalize Florida PALM Conversion Inventory for Segment IV
546 - Update Florida PALM Interface Inventory for Segment IV
547 - Remediate Agency Business Systems based on Segment III



Mindful Task Management

Prioritization Techniques for Overwhelmed Teams

- ▶ Mindful Prioritization
 - How to prioritize effectively
 - Time Blocking
 - Goal Setting
 - Delegate and Collaborate



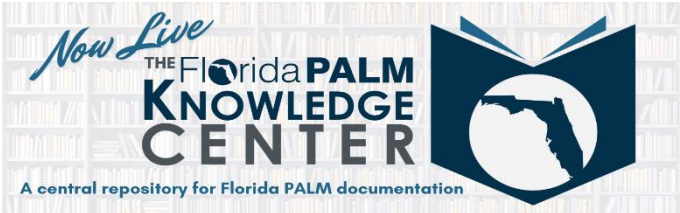
Mindful Task Management

Helpful Tips for Maintaining Work-Life Balance

- ▶ Maintaining Work/Life Balance
 - How to maintain a proper balance
 - Stress Reduction Techniques
 - Set Boundaries
 - Practice Self-Care



New KC Resources



Segment Design workshop demonstration videos have been uploaded

The Florida PALM Knowledge Center serves as the central hub of information that helps agencies quickly and effectively adopt Florida PALM at Financials and Payroll Wave by providing quick access to the design of the system. As the Project moves through the design phase, check back for additional content.

[EXPLORE ON YOUR OWN](#) [ADVANCED SEARCH](#)

Q Demo Video

Write-Off AR (60.1.3)
 module journal entries. Worksheet Application Page Worksheet Action Page [Demo Video](#) Create Maintenance Wor...
 Business Processes > Accounts Receivables > Enter and Maintain Receivables (60.1) > write-off-ar-6013

Set Up and Maintain Customer (50.1)
 Options Tab Customer Entry Page, Miscellaneous General Info Tab [Demo Video](#) Create Customer [Demo Video](#): C ...
 Business Processes > Revenue Accounting > set-up-and-maintain-customer-501-1

Physical Inventory (40.2.5)
 data extract is not generated (nothing available for deletion). [Demo Video](#) Mobile Inventory [Demo Video](#): C lick the...
 Business Processes > Asset Accounting & Management > Deploy and Maintain Assets (40.2) > physical-inventory...

Process Vouchers (30.3.1)
 Summary Tab Figure 3: Voucher Payments Page, Payments Tab [Demo Video](#) Enter a Regular Voucher [Demo Vide...](#)
 Business Processes > Disbursements Management > Enter and Process Vouchers (30.3) > process-vouchers-3031

Record AR (60.1.1)
 1 Tab Receivable Entry Page, Pending Item 2 Tab [Demo Video](#) Create AR [Demo Video](#): C lick the...
 Business Processes > Accounts Receivables > Enter and Maintain Receivables (60.1) > record-ar-6011

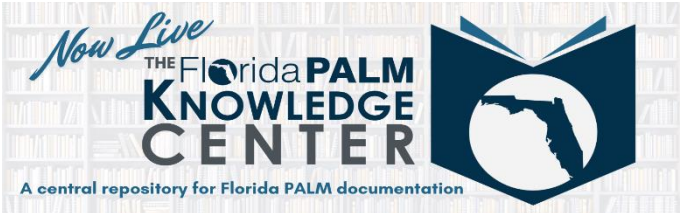
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Getting Started

Interfaces



New KC Resources



Category ▾ Tags : Demo Video ▾ Updated on ▾ X

Process Vouchers (30.3.1)

the transaction and make necessary updates. The Agency AP Processor should confirm that date of transaction falls within an open period. If error persists after making Business Processes > Disbursements Management > Enter and Process Vouchers (30.3) > process-vouchers-3031

Version 1 English

Set Up and Maintain Customer (50.1)

Business Process Overview The Set Up and Maintain Customer business process is within the Accounts Receivable (AR) business process grouping. AR includes a collection Business Processes > Revenue Accounting > set-up-and-maintain-customer-501-1

Version 1 English

Filter Tags

- Deposits
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- Investments and Disinvestments
- Grants
- Conversions
- Payments
- ...

Select all Clear **Apply**



New KC Resources

Table of Contents section titled Demo Video!

Demo Video

Enter a Regular Voucher Demo Video: Click the image below to view a demonstration video on entering a Regular Voucher.



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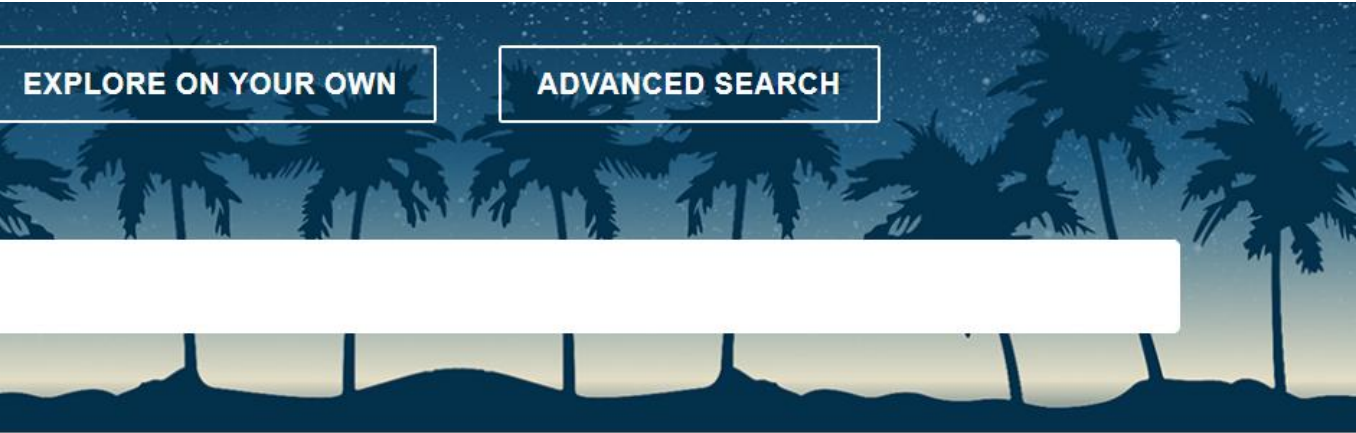
Tags



[Segment I](#) [Demo Video](#)

[Business Processes](#)






New KC Resources




 **Business Processes** 

 **Reports**

 **Conversions** 

 **Configurations**

Filter 

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- ∨ Configurations
 - Configuration Data Values** New
- > System Access and Controls



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