Florida PALM

Planning, Accounting, and Ledger Management

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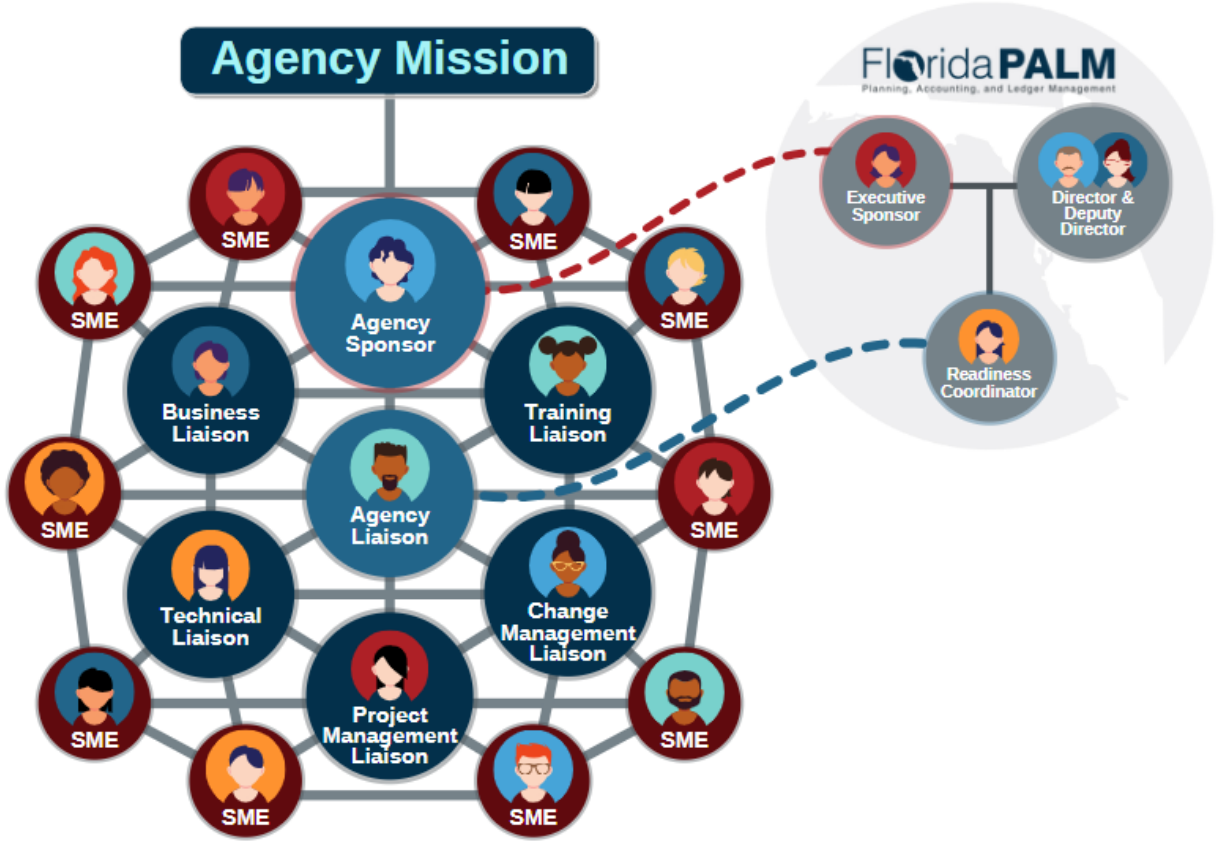
Agenda

- NEW Task 534 - *Update CCN and Project Contacts*
  - Task Overview
  - Completion Criteria
  - Questions
- Status Update: Task 513 – Configuration Workbooks
- Knowledge Center Updates
- Questions

Task 534 - *Update CCN and Project Contacts*



Task Overview

The most effective way to ensure the successful transition to Florida PALM at your agency is to assign roles to staff with the right expertise, skills, and relationships within the agency. It is critical to have your agency's experts lead the Florida PALM implementation of Financials, Payroll, and Data Warehouse and to support current Florida PALM activity.

- For this task, **Agency Sponsors** should review and confirm the make-up of your Florida PALM support network including:

Change Champion Network	Production Support Contacts
Agency Sponsor and backup	Identity Provider (IDP) SME and backup
Agency Liaison and backup	File Manager and backup
Business Liaison and backup	Batch Error Contact and backup
Change Management Liaison and backup	Security Access Manager (SAM) and backup
Project Management Liaison and backup	
Technical Liaison and backup	
Training Liaison and backup	
Subject Matter Experts (SMEs)	

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Task 534 - *Update CCN and Project Contacts*

The CCN Roles and Responsibilities document provides detail about the knowledge and skills needed, and the expectations for each role. Use this document when evaluating or selecting staff to fill CCN roles. At a high level, the agency's CCN is expected to:

- Champion the implementation of Florida PALM
- Work together
- Actively promote and support transformation and readiness efforts
- Coordinate and complete Readiness Workplan (RW) tasks
- Develop and complete agency specific readiness tasks
- Communicate agency transformation progress including risks and successes

- **Smartsheet Navigation:** Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts
  - Each of these worksheets contains your most recent assignment information. Review and update, where necessary, the identified agency individuals and their associated information to ensure alignment with the assigned role.

Task 534 - *Update CCN and Project Contacts*

Task Completion Rubric
All CCN and production support contact primary and backup roles have been filled by an individual (i.e., not "TBD" or "Vacant").
All required columns are filled out and all rows contain a checkmark in the *Current as of June 2024* column, for each of the following worksheets: 1. (Agency) Change Champion Network 2. (Agency) Subject Matter Experts 3. (Agency) Production Support Contacts ***NOTE:*** *Required fields are conditionally formatted to turn yellow if left blank.*
All SMEs are assigned to at least one business process grouping.
Each business process grouping included in your agency's Current State Inventory worksheet, has at least one SME assigned within the *Applicable Business Process Grouping* column. ***NOTE:*** For any business process groupings not assigned to a SME, it will appear within the *Non-applicable Business Process Groupings* column, in the row containing the agency acronym, indicating that the business process grouping is not utilized by the agency.
If changes are required to the (Agency) Security Access Managers worksheet, a completed *SAM Request and Acknowledgement Form* has been submitted to DFS A&A for approval, and a notification email has been sent to your agency Readiness Coordinator. If changes are not needed to the (Agency) Security Access Managers worksheet, a notification email has been sent to your agency Readiness Coordinator.
The Task Tracker has been marked 100% submitted for this task.

Task 513 – *Configuration Workbooks*

Status Update

- ✓ Agency Submission of Task 513 – Configuration Workbook
- ✓ Completeness Review – Readiness Team
- ❑ Smartsheet Configuration Workbooks Locked – Friday, June 7th
- ❑ Validation Review – Functional Team
- ❑ If necessary, Agency-Florida PALM follow-up

Knowledge Center Updates

The Knowledge Center has been updated with new information! Reports:

- PCR013 - FCO Certified Forward Request Detail Report
- PCR015 - Appropriations Budget vs. Project Budget Report
- PRR001 - HR Accounting Line Report
- PRR011 - Payroll Tax Report
- PRR045 - Employee W-4 Exempt Status Report
- PRR062 - Deductions Register New Updated

Interfaces:

- PCI006 - Inbound Project Details
- PCI001 - Outbound Project Information Extract
- PCI008 - Project Costing Budget Upload

Conversions:

- PCC001 - Projects (for Accounting Purposes)
- PCC002 - Projects Life-to-Date Balances

As a reminder, newly posted information will include new icon and updated information icon.

Questions?

Contact Information

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