

FloridaP^{ALM}

Planning, Accounting, and Ledger Management



Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory document detailing data elements your agency currently uses and how they are being used.
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how your agency manages data security and user access.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the current technical design for each system.
327	Data	Complete RPA Inventory	Complete and submit the RPA Inventory documenting all agency RPA processes.
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.
329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and additional support contacts.
330	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida T resources.
331	N/A	Submit Monthly Agency Health Report	Agency Sponsor to confirm and submit the monthly report, in the Project Health Report, detailing the agency's progress in the project.
332	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks and issues related to the project.
333	N/A	Create Agency Specific Readiness Plan	Review the Readiness Plan and develop an implementation plan that includes agency specific tasks to successfully implement the project.
334	N/A	Create Agency Specific Stakeholder Engagement Plan	Create or update a plan to identify and engage stakeholders within the agency.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

JUNE 6, 2024

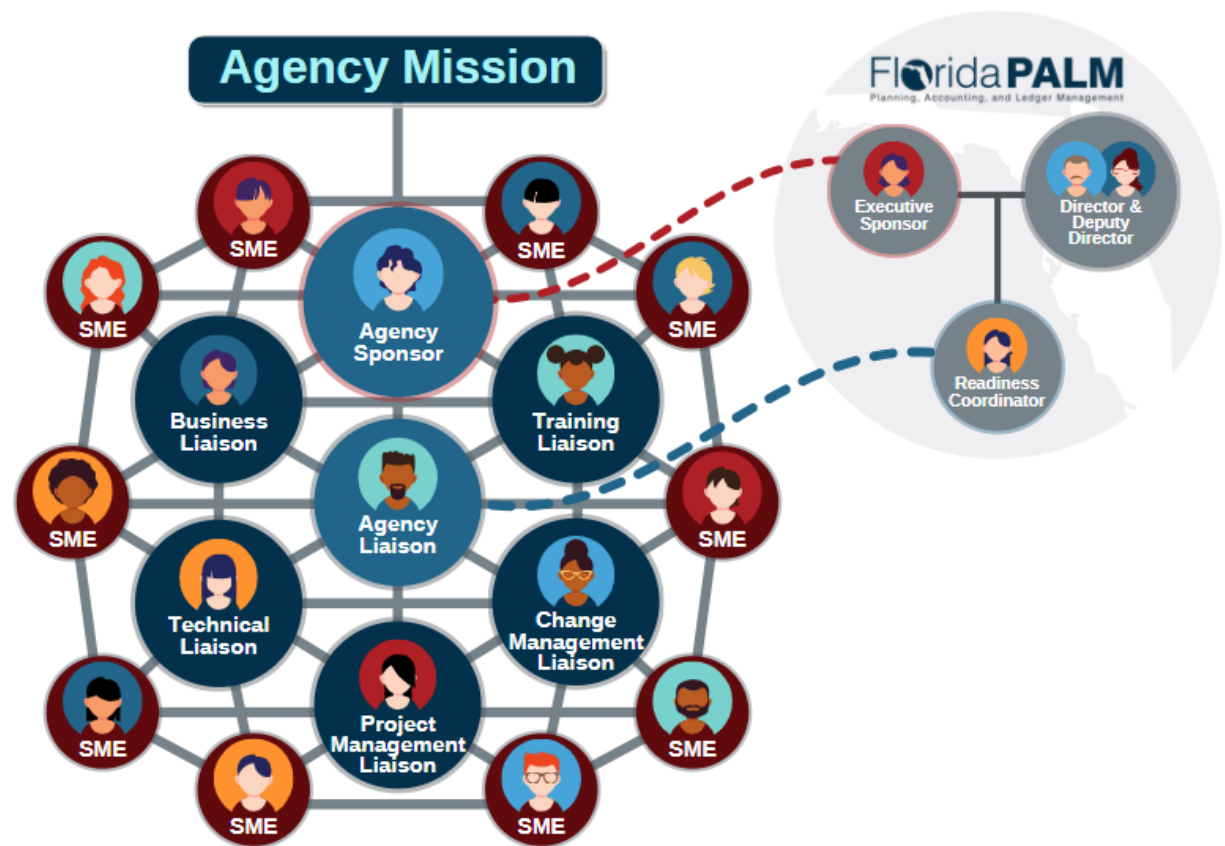


Agenda

- 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)	



Task 534 - *Update CCN and Project Contacts*

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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*

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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 <i>Current as of June 2024</i> column, for each of the following worksheets: <ol style="list-style-type: none">1. (Agency) Change Champion Network2. (Agency) Subject Matter Experts3. (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 <i>Applicable Business Process Grouping</i> column. NOTE: For any business process groupings not assigned to a SME, it will appear within the <i>Non-applicable Business Process Groupings</i> 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 <u>SAM Request and Acknowledgement Form</u> 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*

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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



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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