

# FloridaPALM

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 documenting data elements your agency currently uses and how they are being u
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.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Re document each of current systems technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
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 other support contacts.
330	People	Update Authorized Sheet Users	Review, update and confirm authorized users access to all Florida T resources.
331	N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project, to provide a summary of agency to project impact.
332	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.
333	People	Create Webinars Readiness Plan	Create a plan to identify and assess impacted stakeholders within your agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

JULY 11, 2024



# Agenda

- Secure File Share – Action Required
- Agency Question Log - New Smartsheet Tool
- New Dashboard Feature
- Task Reminders
- Questions



# Secure File Share

What is it?

- ▶ Secure location to exchange and share sensitive or confidential data
  - Folder created for your agency within Florida PALM's SharePoint
- ▶ Preparation for Segment IV Configuration activities
  - Task 541 Complete Configuration Workbooks – July 22 release date

The screenshot displays a SharePoint interface for Florida PALM. The top navigation bar is blue with the 'SharePoint' logo. Below it, the page title is 'Secure File Share'. The left sidebar contains a 'Libraries' section and a 'Return to classic SharePoint' link. The main content area features a table with the following data:

Name	Modified	Modified By
Configuration Workbook Inventory	Tuesday at 3:29 PM	Hartsfield



# Secure Share File

Action Required – Due July 12

## Grant Access

- ▶ **Agency Sponsors** must complete the Secure File Share Access Form
  - Email sent on July 9 to Agency Liaisons and Agency Sponsors with link to form
  - Select two members of your CCN to be granted access to the folder
  - Selected individuals should understand your agency's policies related to viewing, storing, and sharing files with sensitive or confidential data
  
- ▶ Project Follow Up to confirm their access




# Agency Question Log

## New Smartsheet Tool

- Navigation: Florida PALM Workbook for Agency > Agency Readiness > Agency Question Log
- Provides visibility and historical record of submitted questions & answers

Agency Readiness

Actions 

	Name	Sharing	Last Update
<input type="checkbox"/> ☆	Agency Contacts	Workspace	04/27/23
<input type="checkbox"/> ☆	Agency Engagement	Workspace	03/28/24
<input type="checkbox"/> ☆	DEMO Question Log	Workspace	1 minute ago
<input type="checkbox"/> ☆	DEMO Readiness Workplan Task Tracker	Workspace	06/27/24
<input type="checkbox"/> ☆	DEMO UAT Planning Questions	Workspace	06/18/24



# New Dashboard Features - Added Implementation Metrics

## People

The staff and stakeholders affected by your agency's transition to Florida PALM.

### Implementation:

**Planned Florida PALM End Users = 64**

- Business Process Groupings = 8/13

**Identified Subject Matter Experts = 92**

- SMEs by Business Process Grouping
- Account Mgmt. and Financial Reporting = 10
- Accounts Receivable = 7
- Asset Accounting and Mgmt. = 12
- Banking = 5
- Budget Mgmt. and Cash Control = 6
- Contracts Mgmt. = 8
- Disbursements Mgmt. = 9
- Grants Mgmt. = 3
- Inter/IntraUnit Transactions = 2
- Payroll Mgmt. = 16
- Projects Mgmt. = 3
- Revenue Accounting = 10
- System Access and Controls = 1

**Role Mapping = TBD**

**Training = TBD**

## Processes

The sequence of procedures to accomplish a business objective.

### Implementation:

**Impacted Agency Business Processes = 24**

- Related Business Process Groupings = 6/13
- Planned Spreadsheet Uploads = 2
- **Level of Impact: People Changes**
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Processes Changes**
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Technology Changes**
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Data Changes**
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Segments I & II Documentation Update Status**
  - Not Started = 0 In Progress = 0 Complete = 0

## Technology

The applications or tools used to process, track, or report on financial operations.

### Implementation:

**Business Systems Planned for Integration = 8**

- **Segment I - Documentation Updates:**
    - Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 6
  - **Segment II - Documentation Updates:**
    - Complete = 0 Updating = 1 Evaluating = 2 Not Started = 0 Not Needed = 5
- Planned Interfaces = 6**
- Inbound Interfaces = 3
  - Outbound Interfaces = 3

## Data

Information used in or produced from an agency's financial business operations.

### Implementation:

**Segments I & II Planned Configurations = 8/9**

- **Accounts Receivable (AR)**
  - Planned Distribution Codes = 10
- **Asset Management (AM)**
  - Planned Location Codes = 59
  - Planned Associated Area ID's = 13
- **Commitment Control (KK)**
  - Planned Option = Option # 1 - Track with Budget
- **General Ledger (GL)**
  - Planned Budgetary Value Combo Edit's = 100
  - Planned Local Funds = 3
  - Planned Organization ID's = 85
  - Planned OA1's = 2
  - Planned OA2's = None

### **Conversions & Data Readiness**

- Conversions Needed = 3
- Agency Data Outside of Primary Source System(s) = 1
- **Data Readiness/Cleansing Status:**
  - Complete = 1 In Progress = 2 Not Started = 0 Not Applicable = 1



# Reminder: Upcoming Due Dates - July

## July 12

- ✓ 526 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment III
- ✓ 527 - Identify Change Impacts and Update Agency Business Process Documentation for Segment III
- ✓ 528 - Update Agency Business System Documentation for Segment III
- ✓ 529 - Update Florida PALM Conversion Inventory for Segment III
- ✓ 530 - Update Florida PALM Interface Inventory for Segment III
- ✓ 537 - Update Authorized Smartsheet Users
- ✓ 538 - Submit Bimonthly Agency Readiness Status Report





# Questions?



# CONTACT INFORMATION

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