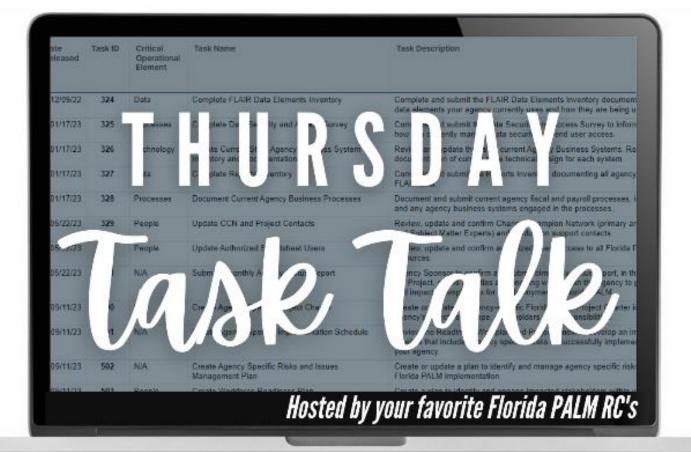
FloridaPALM

Planning, Accounting, and Ledger Management







JULY 11, 2024





Agenda

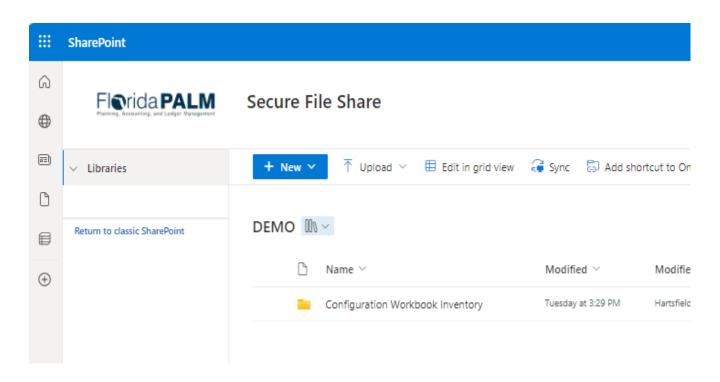
- ➤ Secure File Share Action Required
- > Agency Question Log New Smartsheet Tool
- New Dashboard Feature
- > Task Reminders
- > Questions



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





Secure Share File

Action Required – Due July 12

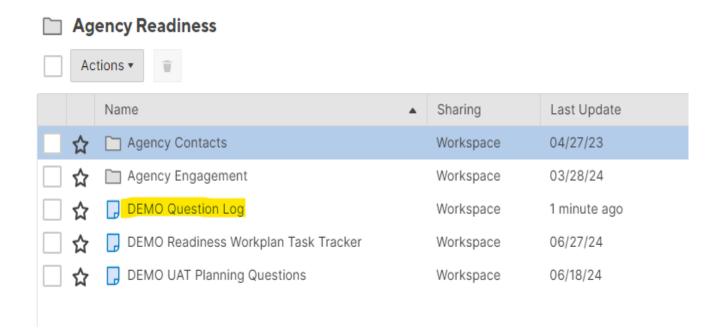
Grant Access

- 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





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
- √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?



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