

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 used.
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. Record the technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency 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 to all Florida TMS systems.
331	N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project, to the Agency to provide a summary of the impact of the project on the Agency's operations.
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 Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks and issues related to the project.
334	People	Create Workforce Readiness Plan	Develop an implementation plan that includes agency specific tasks to successfully implement the project.
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THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

JULY 18, 2024



Agenda

- Task Spotlight - 540 Share Florida PALM Updates
- Secure File Share – Action Required
- Knowledge Center Best Practices
- Questions



Task Spotlight

Task 540 - Share Florida PALM Updates

Purpose

To increase awareness and support of Florida PALM implementation within your agency

Duration

Due July 26 (July 16 – July 26)

- Pro Tip: Continue to update communication worksheet to support this quarterly recurring task



Task Spotlight

Task 540 - Share Florida PALM Updates

Requirements

1. Share Florida PALM updates with the required stakeholder groups:
 - ✓ Agency Leadership
 - ✓ CCN and SMEs
 - ✓ Implementation End Users
2. Complete required fields in the Agency Communications sheet
3. Attach supporting documentation for each communication
4. Mark the task tracker complete



Task Spotlight

Task 540 - Share Florida PALM Updates

Ideas

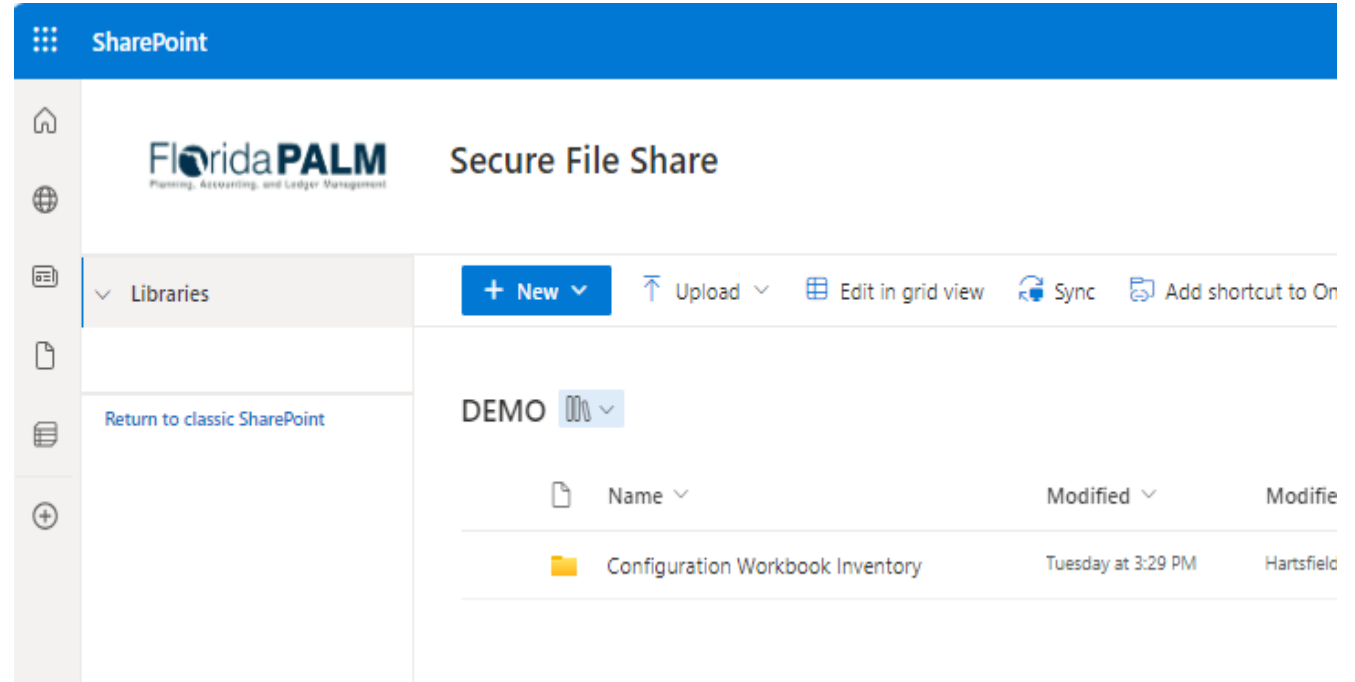
- Posters, bulletin boards, desktop backgrounds
- PALM newsletters
- Email updates about task work, workshops attended, meeting summaries
- PowerPoint presentations
- PALM roadshow, scavenger hunts, games



Secure File Share – Action Required

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



SharePoint

FloridaPALM
Planning, Accounting, and Ledger Management

Secure File Share

Libraries

+ New

Upload

Edit in grid view

Sync

Add shortcut to On

Return to classic SharePoint

DEMO

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



Secure File Share – Action Required

In preparation for conversion and configuration activities, the Project team created a secure place to share sensitive or confidential data related to your agency. A folder has been created for your agency within Florida PALM's SharePoint. Your Agency Sponsor selected you to have access to your agency-specific folder.



What should this folder be used for? Sharing and editing documents containing confidential or sensitive information such as personally identifiable information and bank account information. You may download, upload, or edit the files in this directory. A brief [user guide](#) is available to provide more information on your access capabilities.

What should I do now? Today, you will receive an email notification from SharePoint indicating you have been granted access to the SharePoint site for your agency. We'd like you to confirm your access. Please reply to this email when you have successfully accessed the portal or to request assistance.

Reminder: Confirm access tomorrow, Friday, 7/19/2024.

Knowledge Center Best Practices

Advance Search Feature

- ▶ Find the most recent updates by using the Advance Search



Questions?



CONTACT INFORMATION

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