

# FloridaPALM

Planning, Accounting, and Ledger Management



Due Date	Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	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.
01/17/23	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.
01/17/23	326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the technical design for each system.
01/17/23	327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
01/17/23	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.
05/22/23	329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
05/22/23		People	Update Authorized Worksheet Users	Review, update and confirm authorized worksheet users to all Florida PALM resources.
05/22/23		N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project Charter, detailing the agency's progress with the implementation of Florida PALM.
09/11/23	500		Create Agency Specific Florida PALM Implementation Plan	Create or update a plan to identify and manage agency specific risk and issues related to Florida PALM implementation.
09/11/23	501	N/A	Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risk and issues related to Florida PALM implementation.
09/11/23	502	People	Create Workforce Readiness Plan	Review the Readiness Plan and Project Charter to develop an implementation plan that includes agency specific tasks to successfully implement Florida PALM.
09/11/23	503	People	Create Workforce Readiness Plan	Create a plan to identify and engage impacted stakeholders within the agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

MARCH 13, 2025



# Agenda

- RW Update
- Task Spotlight: 567-M Default Funding Configuration Workbook
- Reminders
- Questions



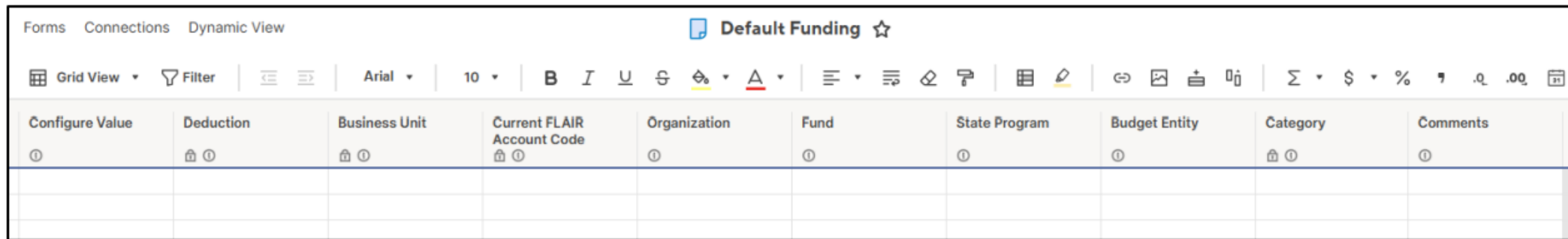
# RW Updates

Task	Summary of Change
536-C – Create Agency Specific User Acceptance Testing Plan	Extended due date to 4/11/2025
560 – Submit Change Analysis Tool	Extended due date to 4/11/2025
579 – Confirm UAT SMEs	New task dates 4/7/2025 – 4/18/2025, Updated Task Name and Description
568 – Create Training Plan for Agency Managed End User Training	Extended due date to 5/30/2025
573-A – Complete and Submit End User Role Mapping Worksheet for UAT	New task dates 4/21/2025 – 6/13/2025
576 – Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing	Extended due date to 7/25/2025



# 567–M Share, Review, and Update Configuration Workbooks – Default Funding **Due March 28**

## Default Funding



The screenshot shows a software interface for a 'Default Funding' worksheet. At the top, there are tabs for 'Forms', 'Connections', and 'Dynamic View', and a title 'Default Funding' with a star icon. Below the tabs is a rich toolbar with various icons for grid view, filter, font settings (Arial, size 10, bold, italic, underline), text color, background color, and other grid functions. The main area is a table with the following columns: 'Configure Value', 'Deduction', 'Business Unit', 'Current FLAIR Account Code', 'Organization', 'Fund', 'State Program', 'Budget Entity', 'Category', and 'Comments'. Each column has a small lock icon and a refresh icon. The table is currently empty.

Configure Value	Deduction	Business Unit	Current FLAIR Account Code	Organization	Fund	State Program	Budget Entity	Category	Comments

Figure 1: Default Funding Worksheet

4. Organization – Select the needed Organization value, if applicable, from the drop-down list that is being assigned to deductions in Florida PALM. This list contains all Florida PALM non-budgetary Organization ChartField values provided with the submission of RW Task 567-B. (Updated on 3/11/2025 to remove restriction on Payroll Only values.)

# Reminders: Upcoming Due Dates for Current Tasks

## March 14

- ✓ 561 – Remediate Agency Business Systems based on Segment IV
- ✓ 658-D – Submit Data Field Mapping (Location Code)

## March 28

- ✓ 567-L-O - Share, Review, and Update Configuration Workbooks

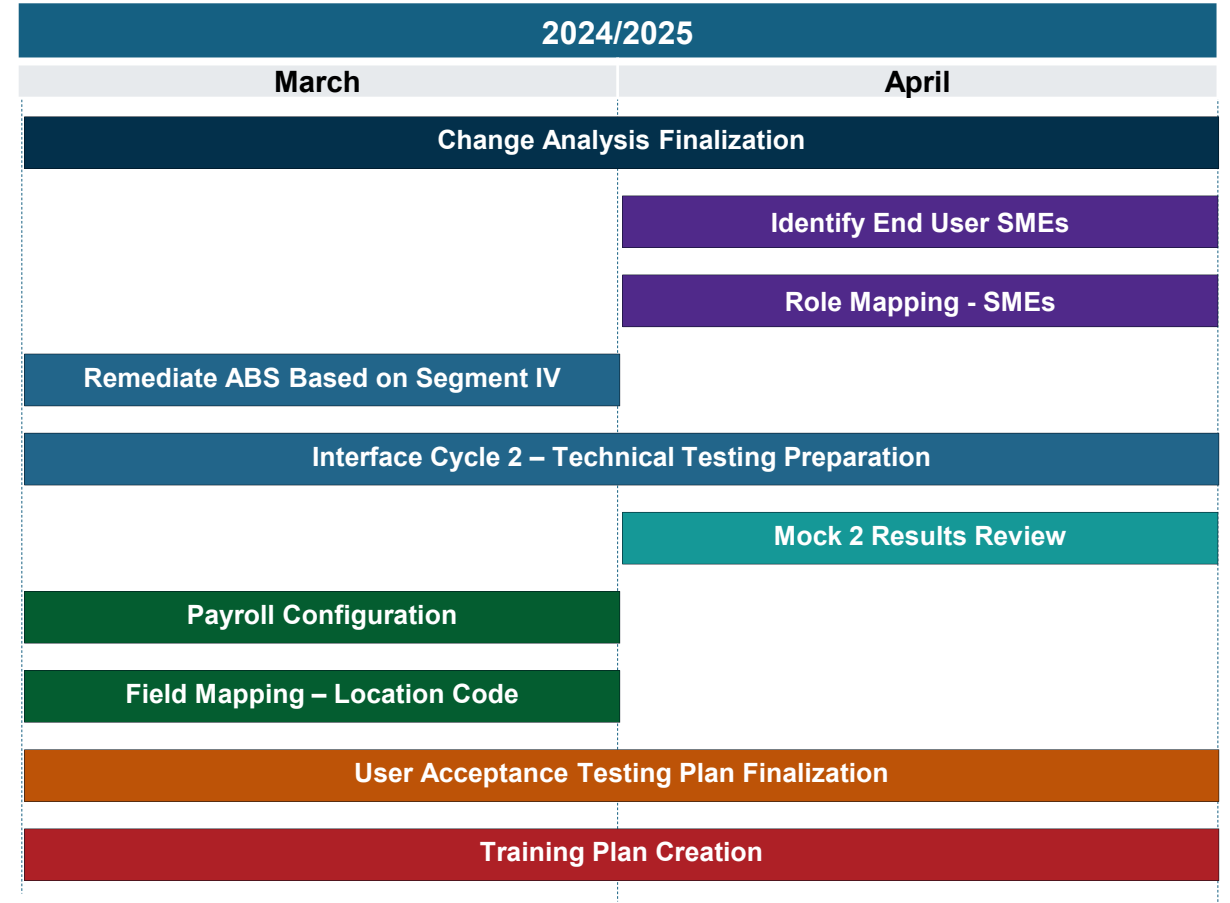
## April 11

- ✓ 536-C - Create Agency Specific User Acceptance Testing Plan
- ✓ 560 - Submit Change Analysis Tool



# Next Few Months

Type	March	April
Processes	<ul style="list-style-type: none"> <li>Change Analysis</li> </ul>	<ul style="list-style-type: none"> <li>Change Analysis Finalization</li> </ul>
Workforce Readiness		<ul style="list-style-type: none"> <li>Identify End User SMEs</li> <li>Role Mapping – SMEs</li> </ul>
ABS / Interface	<ul style="list-style-type: none"> <li>Remediate ABS Based on Segment IV</li> <li>Interface Cycle 2 – Technical Testing Preparation</li> </ul>	<ul style="list-style-type: none"> <li>Interface Cycle 2 – Technical Testing Preparation</li> </ul>
Conversions		<ul style="list-style-type: none"> <li>Mock 2 Results Review</li> </ul>
Configuration	<ul style="list-style-type: none"> <li>Field Mapping – Location Code</li> <li>Payroll Configuration</li> </ul>	
UAT	<ul style="list-style-type: none"> <li>UAT Plan Creation</li> </ul>	<ul style="list-style-type: none"> <li>UAT Plan Finalization</li> </ul>
Training	<ul style="list-style-type: none"> <li>Training Plan Creation</li> </ul>	<ul style="list-style-type: none"> <li>Training Plan Creation</li> <li><i>FL[DS] CoLab on Training Plans</i></li> </ul>





# Save the Date



The banner features a blue background with a white diagonal stripe. On the left, the text 'FloridaPALM Training Plans' is written in white, with 'an FL [DS] CoLab' below it. In the center, a gold circular badge contains the text 'COMING SOON'. On the right, the date 'Wednesday, April 2, 2025' and time '9 AM - 12 PM' are displayed in white. A light blue box at the bottom contains the text: 'Save the date to attend this FL[DS] CoLab discussing strategies and best practices for developing successful Training Plans.'

**FloridaPALM**  
Training Plans

an FL [DS] CoLab

**COMING SOON**

**Wednesday,**  
**April 2, 2025**

9 AM - 12 PM

**Save the date** to attend this FL[DS] CoLab discussing strategies and best practices for developing successful Training Plans.





# Questions?



Bucky!

- Submitted by Benjamin Beha

CONTACT US

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