

# FloridaPALM

Planning, Accounting, and Ledger Management

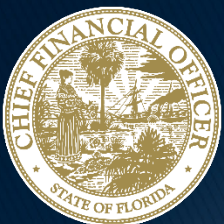


Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements inventory document detailing data elements your agency currently uses and how they are being used.
325	Processes	Complete Data Security and Access 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 State Agency Business Systems	Review and update the current Agency Business Systems. Re-documentation of current state 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 additional support contacts.
	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida resources.
	N/A	Submit Monthly Agency Status Report	Agency Sponsor to confirm and submit monthly status report, in the Project, to the agency's sponsor, ensuring within the agency to project impact reports for the agency's sponsor.
		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM Implementation.
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# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

MAY 15, 2025



# Agenda

- Task Spotlight:

- 571 – Complete Data Cleansing Based on Mock Conversion 2

- Task Reminders:

- 576 – Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing



# 571 – Complete Data Cleansing Based on Mock Conversion 2

**Due 6/20/2025**

## Task Elements:

1. Review the Mock Conversion 2 results for AMC001, APC001\*, CTC001, GLC001, GMC001, KKC001\*, PCC001, PCC002 and POC001.
2. Perform data cleansing and provide data needed for Mock Conversion 3, if applicable.
3. Report data readiness progress in Smartsheet.

## Task Instructions

### Conversion Approach

### Agency Data Readiness Guidance

Mock Conversion 2 Supplemental – AMC001

Mock Conversion 2 Supplemental – APC001

Mock Conversion 2 Supplemental – CTC001

Mock Conversion 2 Supplemental – GLC001 (Coming Soon)

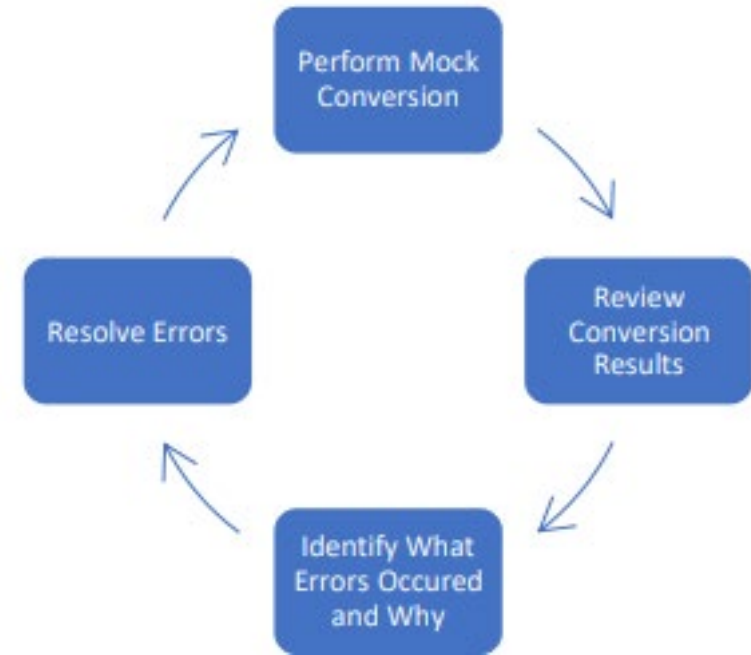
Mock Conversion 2 Supplemental – GMC001

Mock Conversion 2 Supplemental – KKC001

Mock Conversion 2 Supplemental – PCC001 (Coming Soon)

Mock Conversion 2 Supplemental – PCC002

Mock Conversion 2 Supplemental – POC001



*\*Data cleansing not required for APC001 or KKC001*



# 571 – Complete Data Cleansing Based on Mock Conversion 2

## Due 6/20/2025

Connections Dynamic View

DEMO Mock Conversions ☆

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Conversion Name	Mock 2 - Total Number of Records Received	Mock 2 - Successful Load Percentage	Mock 2 - Data Cleansing Status
AMC001 - Asset and Property	80256	92.90%	
CTC001 - Contracts	2238	99.46%	
GLC001 - Ledger			
GMC001 - Grants	849	79.51%	
PCC001 - Projects	205	83.90%	
PCC002 - Projects Life-To-Date Balances	376	99.47%	
POC001 - Open Encumbrances	FLAIR - 8997 MFMP - 2	FLAIR - 92.19% MFMP	

### Secure File

#### 1. Conversion Flat File

This file is for information only.

#### 2. Log File

Agency action: Review the log file for summary count of processed and rejected records.

#### 3. Error File

The file indicates the record row in the Conversion Flat File and provides the field name that caused the error.

#### 4. Record Extract

This will help you understand how your data will look in Florida PALM.











# Task Reminders

## Task 576 – Prepare for Cycle 2 - Technical Interface Testing

- ✓ Monitor and update “When Will You Be Ready” column and “Cycle 2 Test Readiness Status” column in the <Agency> Interface Test Planning worksheet
- ✓ Live report to be published to the Florida PALM website this month

DFS Interface Test Planning ☆		
10 ▾ B I U   ▾ A ▾  ▾  		
When will you be ready for Cycle 2 Testing? 	Cycle 2 Test Readiness Status	Comments
August 2025	Build In Progress - 25%	
August 2025	Build In Progress - 25%	
Before August 2025	Ready for Cycle 2 Testing	



# RW Tasks for May

<b>578</b>	Confirm Identity Provider for Florida PALM	Confirm intended identity provider(s) planned to store or contain the agency's users for Florida PALM.	05/05/25	05/23/25
<b>571</b>	Complete Data Cleansing Based on Mock Conversion 2	Review Mock Conversion 2 results and perform data cleansing activities to prepare data for Mock Conversion 3.	5/12/2025	6/20/2025
<b>659</b>	Update Conversion Field Mapping	Complete and submit mapping of FLAIR codes (ORG, OCA, Grant ID, and Location Code) to Florida PALM values for Mock Conversion 3.	5/19/2025	6/20/2025
<b>657</b>	Submit Updated Configuration Workbooks	Update Configuration Workbooks to prepare for Mock 3	05/19/25	06/20/25
<b>573-A</b>	Complete and Submit End User Role Mapping Worksheet for UAT	Complete and submit the End User Role Mapping Worksheet to assign end users to Florida PALM end user roles to SMEs for UAT.	05/19/25	06/20/25
<b>574</b>	Prepare Documentation for User Acceptance Testing	Create and prepare User Acceptance Testing user stories and materials.	06/02/25	08/08/25



# Reminders: Upcoming Due Dates for Current Tasks

## May 23

- ✓ 578 – Confirm Identity Provider for Florida PALM

## May 30

- ✓ 568 – Create Training Plan for Agency End User Training

## June 20

- ✓ 571 - Complete Data Cleansing Based on Mock Conversion 2

## July 25

- ✓ 576 - Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing





# QUESTIONS?



CONTACT US

[FLORIDAPALM@MYFLORIDACFO.COM](mailto:FLORIDAPALM@MYFLORIDACFO.COM)

PROJECT WEBSITE

[WWW.MYFLORIDACFO.COM/FLORIDAPALM/](http://WWW.MYFLORIDACFO.COM/FLORIDAPALM/)

KNOWLEDGE CENTER

[HTTPS//:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO](https://:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO)

