

# 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 all 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 Agency Business Systems	Review and update the current Agency Business Systems. Re-documentation 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 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, and agency status report to the agency to provide impact reports for the agency's implementation of PALM.
		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*

AUGUST 7, 2025



# Agenda

- Task Spotlight:
  - 660 – Submit Monthly Progress Report - Testing
- Readiness Workplan Updates
- Task Reminders



# 660 Submit Monthly Progress Report-Testing

**Due August 29**

## Task Elements:

1. Review reported progress for Interface Cycle 2 – Technical Testing and update as needed.

- Related Worksheets:
  - Interface Test Planning
  - <Agency> Cycle 2 Technical Interface Testing

2. Submit Monthly Progress Report (Sponsor review/confirm dashboard in lower left corner.)

- Submission form will become available last 5 business days of the task duration and will close the business day after the task end date

The screenshot displays the 'DEMO Progress Report - Testing' dashboard for August 2025. The dashboard is divided into several sections:

- Interface Cycle 2 - Technical Testing**: This section contains three sub-sections:
  - Interface Testing Readiness**: Lists 'Interfaces Requested = 17' and provides a breakdown: Build Not Started = 0, Build In Progress = 0, Build Complete = 1, Unit Testing In Progress = 0, and Ready for Cycle 2 Testing = 16. The 'Percent Complete' is 94.12%.
  - Interface Testing Progress - Inbound**: Lists 'Inbound Interfaces Planned to be Tested = 2' and provides a breakdown: Testing Not Started = 0, Testing In Progress = 2, and Testing Complete = 0. The 'Percent Complete' is 0%.
  - Interface Testing Progress - Outbound**: Lists 'Outbound Interfaces Planned to be Tested = 15' and provides a breakdown: Testing Not Started = 14, Testing In Progress = 1, and Testing Complete = 0. The 'Percent Complete' is 0%.
- Submission**: This section contains two main areas:
  - Primary Agency Sponsor Confirmation**: Includes a statement of understanding, a text field for 'Agency Sponsor Name', a 'Confirm' checkbox, and a 'Submit' button. At the bottom are links for 'Privacy Policy' and 'Report Abuse'.
  - DEMO Progress Report Confirmation**: A table with the following data:

Reporting Period	Agency Sponsor Name	Confirmed By	Confirmation Date
August 2025	John Smith	floridapalm@myfloridapalm.com	07/30/25

*Task 660 is not applicable for agencies with no planned interfaces: DOEA, DOS, EOG, FSDB, and PSC.*



# RW Updates

How do I track Readiness Workplan Updates?

Filter on *Date Released*

**574 – Prepare Documentation for UAT**

*Due date extended to August 29*

**607 – Update Training Plan**

*Start date now to September 2*

**663 – Update UAT Documentation**

*Start date now September 2*

Readiness Workplan (New Only) : smartsheet											
Change History	Date Released	Project Impact	Critical Operational Element	Task Type	Agency Readiness Certification #	Reporting Topics	Task ID	Task Name	Task Description	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)
114	09/11/23	N/A	N/A				570	Manage Agency Specific Implementation Schedule, Risks and Issues	Actively manage your agency's project activities including iterative updates to agency-specific project schedule and manage agency-unique risks and issues.	12/30/24	02/28/25
143	08/06/25	Indirect	Processes	UAT	1, 2		574	Prepare Documentation for User Acceptance Testing	Create and prepare User Acceptance Testing user stories and materials.	06/02/25	08/29/25
161	08/06/25	N/A	People	Training	3		607	Update Training Plan	Update agency specific training plan based on User Acceptance Testing findings.	09/02/25	10/03/25
162	08/06/25	Indirect	Processes	UAT	2		663	Update UAT Documentation	Refine User Stories and Documentation while in SME UAT	09/02/25	10/03/25
163	05/27/25	Indirect	N/A	Progress Report	2		664	Submit Monthly Progress Report - Testing	Provide progress update for agency interface testing and user acceptance testing.	09/02/25	09/30/25





# Reminders

## Tasks Coming Due - August 29

- ✓ 574 – Prepare Documentation for User Acceptance Testing
- ✓ 660 – Submit Monthly Progress Report - Testing

## Tasks Releasing Next Week (Due 10/3)

- ✓ 587 – Complete Data Cleansing Based on Mock Conversion 3
- ✓ 661 – Update Conversion Field Mapping
- ✓ 662 – Submit Updated Configuration Workbooks

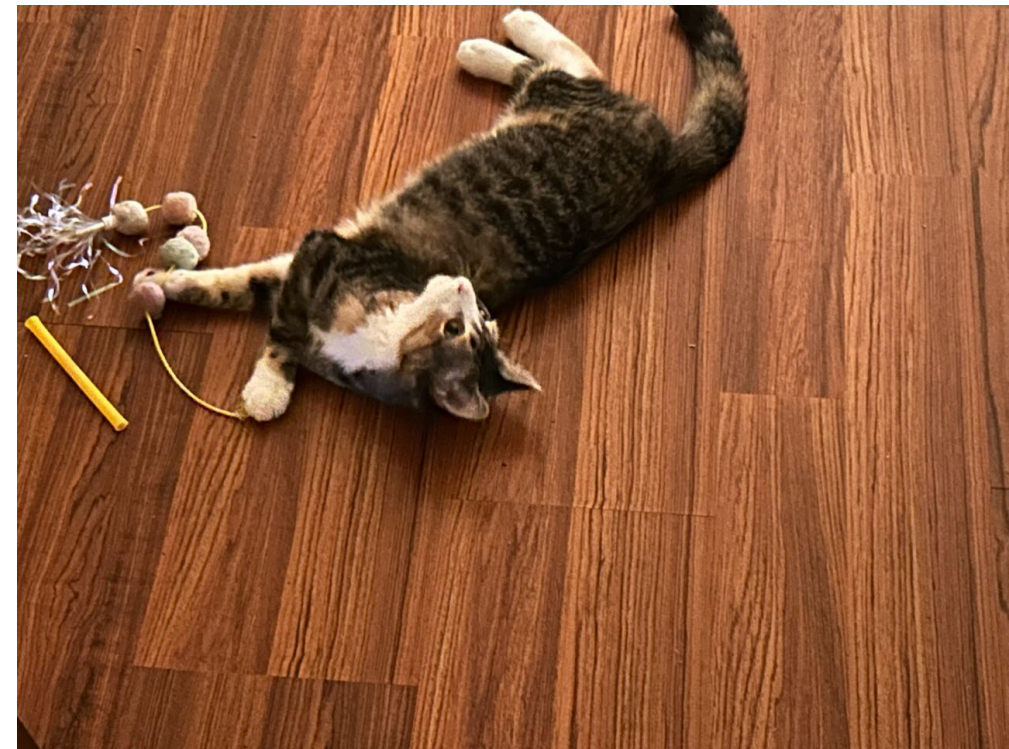
\*Note – Conversion Mapping and Agency Supplier Record worksheets are locked for maintenance starting today





**Questions?**

**HONEY B**



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