

FloridaPALM

Planning, Accounting, and Ledger Management

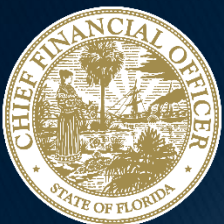


Task Released	Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory document detailing data elements your agency currently uses and how they are being used.
01/17/23	325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how your agency manages 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 current 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 additional support contacts.
05/22/23		People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida T resources.
05/22/23		N/A	Submit Monthly Agency Health Report	Agency Sponsor to confirm and submit monthly health report, in the Project Health Report template, to the agency to inform the project impact on agency operations for the current month.
09/11/23	400		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
09/11/23	401	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
09/11/23	502	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
09/11/23	503	People	Create Webinars Headlines Plan	Create a plan to identify and assess impacted stakeholders within the agency.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

AUGUST 21, 2025



Agenda

- Interface Testing
 - Enterprise Partner and Third-Party Testing
 - Agency Testing Began 8/1
 - Status
 - What is Going Well
 - Where Can We Improve
 - Coordination is Key
- Prerequisite Tracking Update
- Task Reminders



Enterprise Partner Interface Testing

- ▶ Technical Testing began late June
 - Technical Testing began late June
 - Test Execution Results (as of 8/18)
 - 77% of the inbound interfaces have been tested
 - 74% of the outbound interfaces have been tested

Enterprise Partner Interface Testing	
5 Enterprise Partners	78 Interface Work Units
31 Inbound Connections	24 Interface Test Executions
47 Outbound Connections	35 Connections Tested



Agency Interface Testing

- ▶ Technical Testing began August 1st
 - 200 Interface connections planned for August
 - Test Execution Results (as of 8/18)
 - 30% of Inbounds have been tested
 - 15% of Outbounds have been tested

Agency Interface Testing	
38 Agency Partners	421 Interface Work Units
143 Inbound Connections	42 Interface Test Executions
278 Outbound Connections	43 Connections Tested



Interface Testing – What's Working?

- ▶ Daily Touchpoint Meetings
- ▶ Real data testing and business scenarios
 - Helps identify configuration updates needed (both system and agency defined)
 - Discovering changes that will influence run control setup and batch design
 - Testing now will help UAT run smoother
 - Value for developing future operational support procedures



Interface Testing – What Can We Do Better?

- ▶ Coordination is Key!
 - Important for inbound, and especially outbound, files
 - Use your SS Technical Interface Testing Sheet to notify the Project of new test files
 - Wait to download and test outbound files until notified by the Project
- ▶ The Project is working to improve response time
 - Added two additional resources to assist with testing and coordination
 - Revising outbound file generation to ensure test files are delivered to your agency Outbound MFT folder only when expected
- ▶ Interface Error Log Formatting
 - We are actively logging issues found that can affect error log formatting
 - Commas in error messages
 - Error message content



Interface Testing – What Can We Do Better?

- ▶ Error Log Data Elements
 - Error messages use delivered DB column names
 - Several fields have been repurposed to capture Florida specific ChartFields
 - When reviewing error logs, it may be helpful to keep a cheat sheet on hand for translating the technical column names in the error message to the ChartField
 - This crosswalk is available on the Knowledge Center

Functional Data Element	PALM Data Field Name
Business Unit	BUSINESS_UNIT_GL
Organization	DEPTID
Fund	FUND_CODE
Budget Entity	BUDGET_REF
Category	PRODUCT
State Program	CHARTFIELD2
Grant	PROGRAM_CODE
Contract	CHARTFIELD1
OA1	CLASS_FLD
OA2	CHARTFIELD3
PC Business Unit	BUSINESS_UNIT_PC
Project	PROJECT_ID
Activity	ACTIVITY_ID
PC Source Type	RESOURCE_TYPE
PC Category	RESOURCE_CATEGORY
PC Subcategory	RESOURCE_SUB_CAT



Interface Testing – Reminders

- ▶ It should be difficult this early in testing
- ▶ Errors are good for testing, not so much in Production
- ▶ Inbound test results will not be available immediately
 - 2–3- business day turnaround
 - Project interface testing team reviews results of each test file before uploading to MFT for retrieval
 - We are testing with multiple agencies simultaneously
 - Resolving data conversion issues found through interface testing



Interface Testing – Reminders

- ▶ Some interfaces require downstream processing in order to generate files (i.e., API031)
- ▶ Test with valid data (API002 must use valid Supplier ID values)
- ▶ Don't start with negative testing
- ▶ Check those pipes | !
- ▶ Use exact file naming conventions as specified in the layout, including lowercase file extension (.txt)



Prerequisite Tracking Update

- ▶ Updated Knowledge Center Article of UAT Prerequisites
 - How to find UAT Prerequisite Trainings
 - Steps to create Program Status Report (CSV)
 - Program IDs added to Learning Path
- ▶ Prerequisite Tracking Smartsheet updated to track by Program

FINDING FIN/PAY UAT PREREQUISITE TRAININGS

Learn how to quickly find your required training in the People First LMS

VIEW MY LEARNING



Log in to People First LMS and choose the Talent Management Tile. Click on View My Learning.

SEARCH "FIN PAY"

To view all trainings, search "FIN PAY" to see 13 UAT programs (i.e., collection of courses) that are applicable to all users and to specific Business Process Groupings (BPG).

SELECT A PROGRAM

All end users are required to complete the **Florida PALM – FIN/PAY UAT – Getting to Know Florida PALM** program as well as any program(s) associated with their assigned Business Process Grouping(s).



Find Learning

FIN PAY

Search

Florida PALM - FIN/PAY UAT - Chart of Accounts - ChartFields

Florida PALM - FIN/PAY UAT - Chart of Accounts - Budget Structure


Florida PALM - FIN/PAY UAT - Getting to Know Florida PALM

Florida PALM - FIN/PAY UAT - AMFR - Getting to Work in Florida PALM

Florida PALM - FIN/PAY UAT - PR - Getting to Work in Florida PALM

Florida PALM - FIN/PAY UAT - AAM - Getting to Work in Florida PALM

Florida PALM - FIN/PAY UAT - BK - Getting to Work in Florida PALM




Florida PALM
Planning, Accounting, and Ledger Management

Florida PALM - FIN/PAY UAT - Chart of Accounts - Open-Select Program

✓

Enroll

More




PALM TECH
Training, Enrichment, Communication, & Help

PALM TECH - DFS CMA Payment Card... Open-Select Program

✗

Enroll

More



UAT Prerequisite: Preparing for UAT COURSE DFS CMA UAT (The Prep)

✗

Start Course

More

FloridaPALM
Planning, Accounting, and Ledger Management

08/21/2025

Reminders – Upcoming Task Due Dates

August 29

- ✓ 574 – Prepare Documentation for User Acceptance Testing
- ✓ 660 – Submit Monthly Progress Report – Testing (Opens for submission on 8/25)
- ✓ 587B – Complete Data Cleansing Based on Mock Conversion 3 – APC001

October 3

- ✓ 587A – Complete Data Cleansing Based on Mock Conversion 3
- ✓ 587C – Complete Data Cleansing Based on Mock Conversion 3 – PCC001
- ✓ 661 – Update Conversion Field Mapping
- ✓ 662 – Submit Updated Configuration Workbooks





Questions?



CONTACT US

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PROJECT WEBSITE

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KNOWLEDGE CENTER

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