

Florida **PALM**

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

SPECIAL EDITION

APRIL 30, 2026



Agenda

- ▶ Dry Run 1 Conversion Overview
 - GLC001
- ▶ Task 713 – Confirm Supplier Records - Update
- ▶ Update to Conversion Mapping – Location Code
- ▶ Updates to Role Mapping Resources
- ▶ Task Reminders & Updates
- ▶ Questions



698 – Complete Data Cleansing in Prep of Dry Run 2

Due 6/17/2026

- Review conversion results and updated guidance.
- Complete data cleansing in the source system.
 - Maintain progress of data cleansing in Smartsheet > Reflected on Monthly Progress Report Dashboard
- Conversion results shared in Secure File Share on 4/20
- Agency Conversions:
 - General Ledger – GLC001
 - Assets and Property – AMC001
 - Contracts – CTC001
 - Grants – GMC001
 - Budgets – KKC001
 - Projects – PCC001
 - Projects Life-to-Date Balances – PCC002
 - Open Encumbrances – POC001



713 – Confirm Supplier Records - Update

Due 5/22/2026

Task updated to remove requirement to confirm Confidential Suppliers

- All active confidential vendors in FLAIR will be converted to Florida PALM as confidential suppliers via APC001 – Suppliers Conversion
- Task instructions, APC001 Supplemental, and task description updated to reflect
- If you do not want Confidential suppliers converted at all, mark them as deleted and they will not be converted to Florida PALM. Note: if they are active in the Statewide Vendor File as confidential vendors in FLAIR, they will convert to Florida PALM.
- Task still requires agencies to confirm their Agency Supplier Record in Secure File Share



Updates to Location Code Mapping for Asset Conversion

Based on feedback from Assets UAT Sessions


- You have previously mapped FLAIR Location Code to Florida PALM Location Code in the <Agency> *Conversion Mapping – Location Code* worksheet
- Mapping is applied in the AMC001 Assets and Property Conversion
- Worksheets are being updated to allow agencies to map to a FLAIR Location Code to a Florida PALM Location Code and Area ID Value
- Adding Area ID allows agencies to map to a more detailed level
- Use of Area ID in mapping will be optional



Updates to Role Mapping Resources

- [Role Assignment Overview](#) article in KC has been updated, includes more information regarding
 - DW/BI roles
 - Role Security including Bank Security Roles
- Enhanced [End User Role Listing - Smartsheet.com](#)
 - Added Role Description and Responsibilities
 - Accompanying Roles
 - If Bank Security Role is needed
 - If the role requires Org Security
 - Indication of who has the ability to assign the role

End User Role Listing (View Only) :



Grid

	As of Date	Change History	BPG	Module	Entity	End User Role	Role Description & Responsibilities	Accompanying Roles	Access to Sensitive Data	Bank Security Role Needed?	Requires Org Security	Assigned by	Include In Role Mapping?
1	04/28/26	Added Role Description & Responsibilities and Accompanying Roles	Asset Accounting & Management	AM	Agency	Agency AM Asset Administrator	<ul style="list-style-type: none"> - Updates and maintains Asset Management configuration values that are administered at the agency level. - Creates and maintains locations. - Has the ability to access pages which provide the option to view or edit information for any asset within the Business Unit and to run ad-hoc batch processes for assets within the Business Unit. - Establishes/maintains Asset Control requested by a DFS AM Asset Administrator, Agency AM Asset Processor, and an Agency AM Asset Custodian. The role can also run batch processes ad-hoc for Agency AM Asset Processors and perform asset updates for Agency AM Asset Processors. 	Agency AM Reporter Agency AM Viewer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SAM	Yes

Task Reminders

Current Tasks Due Dates:

Thursday, April 30 – DUE TODAY

- ✓ 675 – Submit Monthly Progress Report - Testing
- ✓ 696 – Maintain Role Mapping Worksheet
- ✓ 697 – Maintain Configuration & Conversion Workbooks (*Conversion workbooks will not be included in task verification requirements*)

Friday, May 22

- ✓ 713 – Submit Supplier Records

Friday, June 5

- ✓ 607 – Update Training Plan

Wednesday, June 17

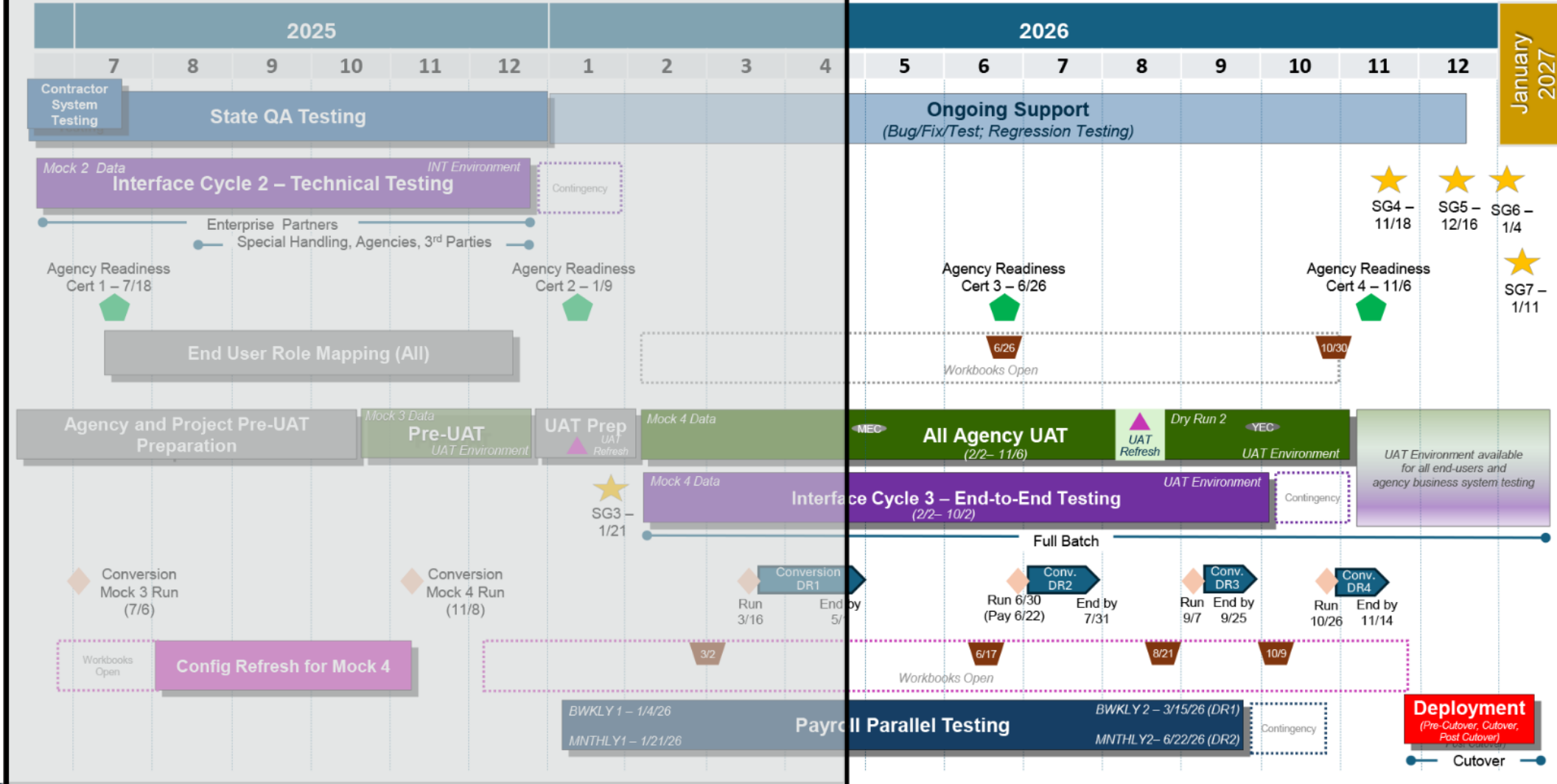
- ✓ 698 – Complete Data Cleansing in Preparation for Dry Run 2



Testing Timeline

As of April 22, 2026

January
2027



UAT Reminders

- DW/BI sessions continue next week
- UAT Coordinators – Please work with your agency testers supporting the testing of enterprise systems (e.g., MFMP, STMS) to ensure they have information about new and viable ChartField strings for use in testing.
- UAT Office Hours tomorrow (in Teams)

BE PREPARED

To ensure a successful UAT experience, prepare yourself by completing these steps first.

- Complete the Prerequisites**
Find which trainings are required for your role(s) based on Business Process Grouping on the [UAT Prerequisites](#) page in the Knowledge Center.
- Confirm your UAT Access**
Before arriving at your assigned UAT session, confirm you are able to log into the [UAT environment](#). Log in from a remote location, outside of your network.
- Confirm your Role(s)**
Confirm with your SAM that you have been given the role(s) you'll need during your assigned UAT session. The [Pre-Materials](#) page on the Knowledge Center lists the roles needed for each UAT subject matter.
- Review the Pre-Materials**
Review the Process Steps and Demo Videos on the Pre-Materials page on the Knowledge Center. Become familiar with basic navigation and attempt to follow the Process Steps.
- Identify your Testing Support contacts**
Familiarize yourself with your agency [UAT Coordinators](#), your agency [SAM](#), and your Testing Error Triage team. These individuals will help with any environment access or role assignment issues, or with troubleshooting testing issues.
- Check the UAT Communications Page regularly**
The [UAT Communications](#) page in the Knowledge Center is your central location for UAT information. By "following" the page, you can be alerted when new messages or information is made available. [FOLLOW](#)

Questions?



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