

Florida **PALM**

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

MAY 7, 2026



Agenda

- ▶ Task Spotlight
 - 678 – Submit Monthly Progress Report – Testing, Training
 - 602 – Update Agency Business Process Documentation
 - 604 – Create Agency-Specific Learning Materials to Support End Users
- ▶ Task Reminders
- ▶ Questions



678 – Submit Monthly Progress Report – Testing, Training

Due 5/29/2026

What's New? - Training Plan Update

- Added Training widget to report Training Plan progress (current Task 607)

Training					
Training Plan Update					
Training Plan Update Progress	Estimated Training Population	How many users create/approve transactions?	How many users are reporting/inquiry only?	Do you plan to create agency-specific training?	Agency-specific Training Approach
Required Updates Have Been Identified	101-150			Yes	Demo

Role Mapping Widget Update

- Moved role mapping worksheet error count into the Role Mapping widget

Role Mapping
Total Number of Identified End Users =
- Number of End Users in Initial Load =
- Number of Enabled End Users in UAT Environment =
Percent of End Users in UAT Environment = %
Count of Role Mapping Worksheet Rows with Error Messages =



678 – Submit Monthly Progress Report – Testing, Training

Due 5/29/2026

User Story Activity Coverage

- Worksheet now includes Topic column
- Widget on dashboard includes new stats

User Stories / Project Defined Activities Summary

Combined Counts

- Non-Applicable Activities =
- Non-Applicable Project Recommended Activities =
- Applicable Activities with User Stories =
- Applicable Activities without User Stories =

Percent of Applicable Activities with User Stories = / = %

Best Practice

- Do not mark applicable activities as N/A to complete task/clear error messaging

Forms Connections Dynamic View DFS User Story Activity Coverage ☆							
BPG	Topic	Activity Name	User Story Inclusion	Entity	Project Recommended Standard Activity	Activity Not Applicable	
AAM	Creating a Lease	Activating a Lease	<input checked="" type="checkbox"/>	Agency	<input type="checkbox"/>	<input type="checkbox"/>	
AAM	Managing Pre-Period Close	Completing a Pending Transfer/Disposal	<input checked="" type="checkbox"/>	Agency	<input type="checkbox"/>	<input type="checkbox"/>	
AAM	Creating a Lease	Creating a Lease	<input checked="" type="checkbox"/>	Agency	<input type="checkbox"/>	<input type="checkbox"/>	
AAM	Acquire and Set Up Assets	Creating an Asset Online	<input checked="" type="checkbox"/>	Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
AAM	Managing Pre-Period Close	Creating and Updating Asset Records	<input checked="" type="checkbox"/>	Agency	<input type="checkbox"/>	<input type="checkbox"/>	

602 – Update Agency Business Process Documentation

Due 10/30/2026

Update/Create Business Process Documentation based on UAT

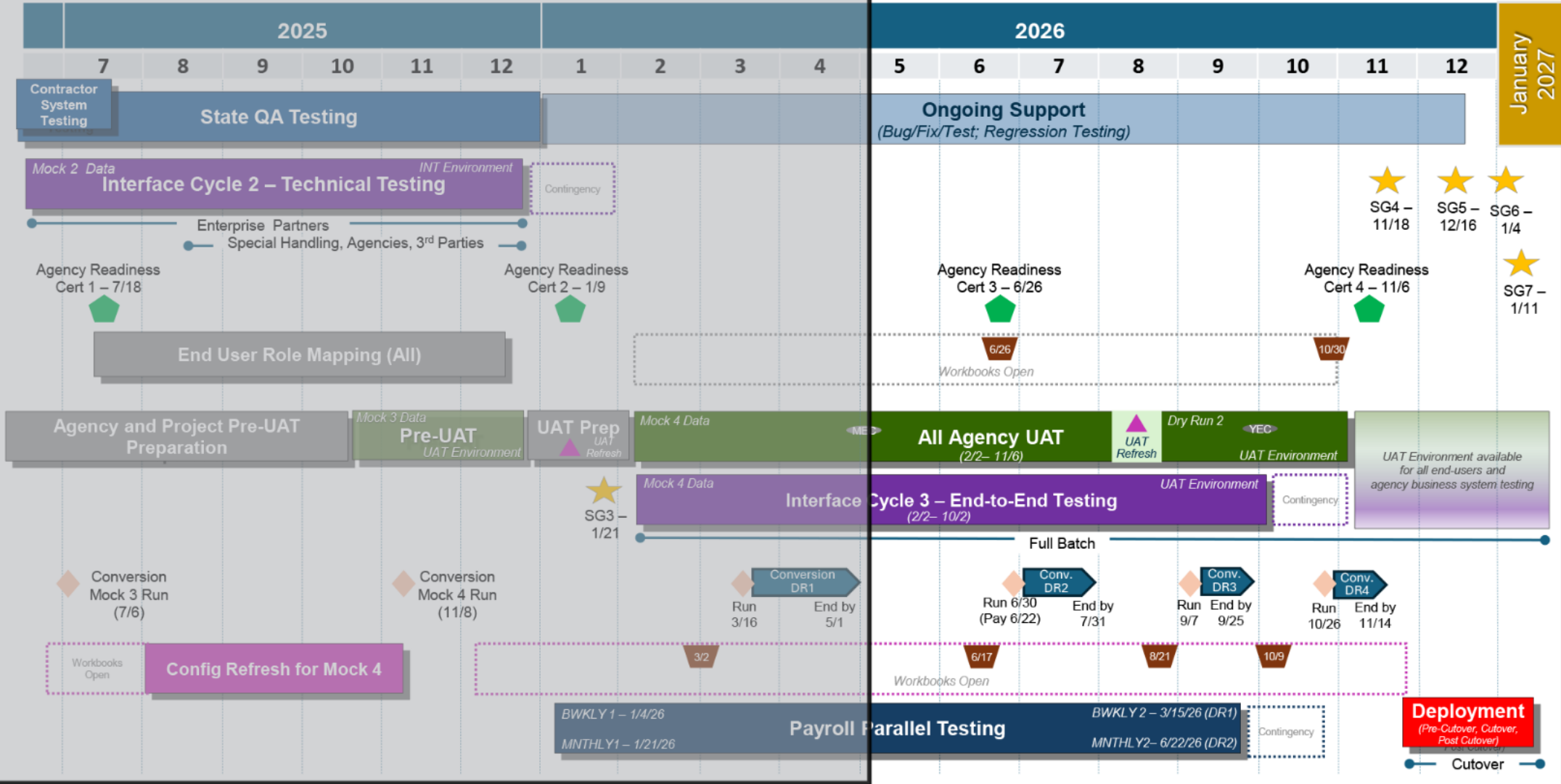
- Predecessor RW tasks – 328 (Current State) and 515, 527, 543 (iterative updates based on Florida PALM design)
- Applicable Topics are auto-populated based on User Story Coverage Worksheet
 - Complete worksheet for each applicable Topic
- This task is included in criteria for Readiness Certification #3 - ***Agency has identified all process documentation to be created or updated based on testing results***

Business Process Grouping	Topic	Do you need to create or update documentation?	Primary Owner	Impacted Users/Roles	Documentation Type	Documentation Status	Comments
AAM	Acquire and Set Up Assets						
AAM	Asset Accounting and Management Reporting						

Testing Timeline

As of April 22, 2026

January 2027



Task Reminders

Current Tasks Due Dates:

Monday, May 11

- ✓ 677 – Submit Bimonthly Agency Readiness Status Report

Friday, May 22

- ✓ 713 – Confirm Supplier Records

Friday, May 29

- ✓ 678 – Submit Monthly Progress Report - Testing, Training
- ✓ 699 – Maintain Configuration and Conversion Workbooks
- ✓ 700 – Maintain Role Mapping Worksheet

Friday, June 5

- ✓ 607 – Update Training Plan

Wednesday, June 17

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



Questions?



Working Together to
Transform Florida



FloridaPALM
Planning, Accounting, and Ledger Management



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