

FloridaPALM

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

OCTOBER 1, 2026



Agenda

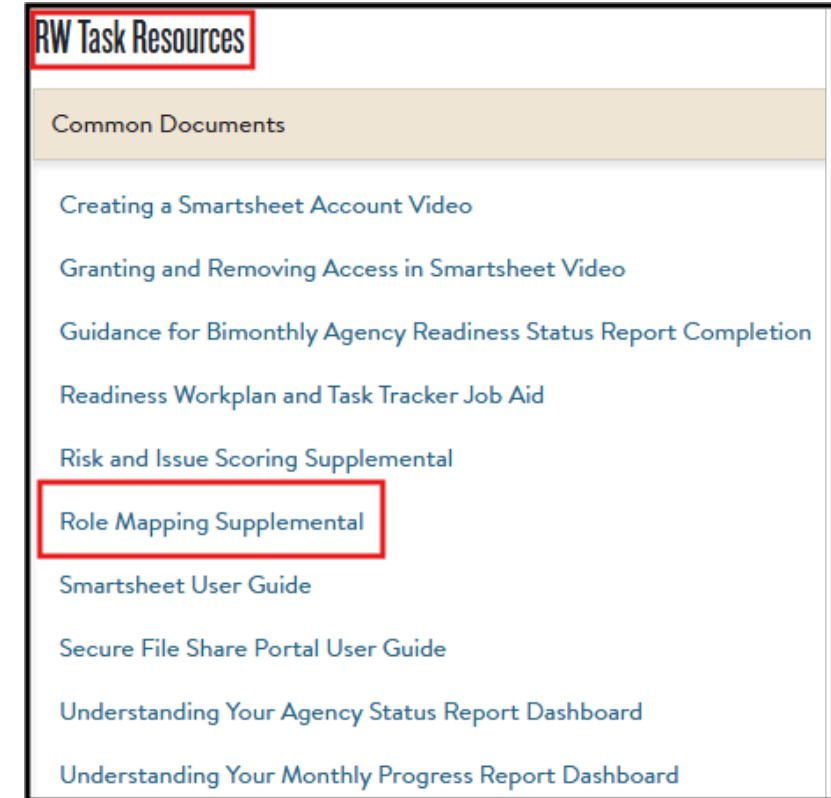
- ▶ Role Mapping Updates
- ▶ October Monthly Progress Report
- ▶ Spill The Training Tea!
- ▶ KC Happenings and Other News
- ▶ Upcoming Due Dates and Reminders
- ▶ Questions



Role Mapping Updates

- Agency role mapping worksheets have been updated with three enhancements.
 - The “Topic” column is now auto populated with the applicable topics based on the end user role assignment
 - Two new columns have been added
 - Identify MFMP/STMS Enterprise System Users only
 - Users can only have Agency AP Processor role required for enterprise system
 - These users are not required to complete training
 - Identify users that need Bank Security Role – granting access to banking information.
- New SOD conflicts added for Asset Management roles
 - [End User Role Conflict Listing - Smartsheet.com](#)
 - [Agency SOD Conflict Matrix - Smartsheet.com](#)

NOTE: Agency role mapping worksheets in Smartsheet are not connected to the UAT environment.



Task 692 – October Monthly Progress Report

Due – 10/30

- ▶ **Reminder - UAT Proviso Requirements Questionnaire**
 - All items must be in a “Complete” status by end of UAT 11/6
 - If Project assistance is needed, reach out to your Readiness Coordinator ASAP
- ▶ **Reminder**
 - In Person Training Sessions
 - Dashboard widgets show number of registrants and number of attendees for session held during the reporting month

In Person Training Sessions			
Florida PALM Fundamentals Identification		Building Reports and Queries Identification	
Registered for Florida PALM Fundamentals Sessions	Attended Florida PALM Fundamentals Sessions	Registered for Building Reports & Queries	Attended Building Reports & Queries
16	0	0	0

Dashboard updates to be completed early next week



Task 692 – October Monthly Progress Report

Due – 10/30

- Training
 - Report WBT completion in your new <Agency> *Training Completion Tracker* worksheet
 - Number of required WBT, number of WBT complete, and percent complete shown in dashboard

Displays total WBT required/completed for all Subject Areas

Represents total WBT required/completed for each BPG.

% Complete will turn green at 95%

Web-Based Trainings		
Overall Subject Area Trainings	Currently Released Overall Subject Area Trainings	
- Total Count of Required Trainings = 337 - Total Count of Completed Required Trainings = 200 Percent Complete = 59.35%	- Total Count of Currently Released Required Trainings = 105 - Total Count of Currently Released Completed Required Trainings = 15 Percent Complete = 14.29%	
Currently Released - DM	Currently Released - IU	Currently Released - PR
Creating and Maintaining Encumbrances - Total Count of Users Required to Complete Training = 13 - Total Count of Users that have Completed Training = 10 Percent Complete = 76.93%	Managing IU Transactions - Total Count of Users Required to Complete Training = 21 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%	Maintaining Payroll Adjustments - Total Count of Users Required to Complete Training = 7 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%
Entering and Processing Vouchers - Total Count of Users Required to Complete Training = 7 - Total Count of Users that have Completed Training = 1 Percent Complete = 14.29%	Processing IU Transactions - Total Count of Users Required to Complete Training = 22 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%	Managing Payroll Accounting - Total Count of Users Required to Complete Training = 9 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%
Managing AP/PO Transactions - Total Count of Users Required to Complete Training = 4 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%		Processing Payroll - Total Count of Users Required to Complete Training = 9 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%
Managing Payment Cancellations - Total Count of Users Required to Complete Training = 2 - Total Count of Users that have Completed Training = 0 Percent Complete = 0%		Setting Up and Maintaining Position Funding - Total Count of Users Required to Complete Training = 3 - Total Count of Users that have Completed Training = 1 Percent Complete = 33.33%
Setting Up and Maintaining Suppliers - Total Count of Users Required to Complete Training = 8 - Total Count of Users that have Completed Training = 3 Percent Complete = 2.67%		

Represents total WBT required/completed for only those released on 10/2 and 10/16.

This percentage complete correlates with Readiness Certification #4 Training Completion Criteria. Goal is at least 25% complete by 10/30.

% Complete will turn green at 25%

Task 692 – October Monthly Progress Report

Due – 10/30

- <Agency> *Training Completion Tracker* worksheet
 - Use to report progress and completion of WBT required for your end users
 - WBT is required based on role assignment
 - Subject Areas report shows all Subject Areas (aka WBTs) and the related roles
 - WBT completion must be updated by the agency – it is not updated by the Project or by the LMS
 - Populated with users and their roles from your Role Mapping Worksheet
 - Updates (e.g., new users added, roles added or removed) to role mapping will appear in the Training Completion Tracker the next day after API runs
 - Conditional Formatting
 - Yellow cells indicate required training needs to be completed
 - Cells only turn green when a required training is noted as complete
 - Gray cells indicate the training is not required – completion can be reported for user, but does not impact calculation of completed training on your Progress Report Dashboard
 - Columns will be unlocked as WBTs are released



Task 692 – October Monthly Progress Report

Due – 10/30

- *<Agency> Training Tracker – Cert 4 Training Criteria Report*
 - Report view of the Training Completion Tracker
 - Filtered to only show your agency's subset of end users that are required to take the WBTs being release 10/2 and 10/16
 - Use this report to focus in on users needed to complete training for Readiness Certification #4
- Recent Subject Area Name Change noted on the [WBT Release Schedule](#)
 - Managing Payments Subject Area has been broken into
 - Managing Payments Cancellations
 - Recording and Managing Manual Payments (for Commerce users only)
 - This change will be updated to your Training Completion Tracker no later than Monday





It's Training Time!

- Tomorrow – WBT release
- Monday – Weekly DW/BI Support Sessions begin
- Tuesday – ***Learning Matters*** - Weekly Training Topics Working Sessions begin
- Wednesday – In Person Training Sessions begin - *Fundamentals*

Are you ready?

Preparing for Training

What training is required and when will it be available?

- ▶ End users must complete WBT in the LMS based on role assignment
- ▶ Agencies must track and report completion
- ▶ The WBT Release Schedule provides planned and actual release dates

WBT Release Schedule (View Only) :					
	BPG	Subject Area	Planned Release Date	Actual Release Date	Comment
Total			Count	38	
▼ Planned Release Date 10/02/26			Count	8	
1	DM	Creating and Maintaining Encumbrances	10/02/26		
2	DM	Entering and Processing Vouchers	10/02/26		
3	DM	Managing AP/PO Transactions	10/02/26		
4	DM	Managing Payment Cancellations	10/02/26		9/27 - Managing Payments Subject Area broken into Managing Payment Cancellations and Recording and Managing Manual Payments, which is only applicable to Commerce users.
5	DM	Recording and Managing Manual Payments	10/02/26		9/27 - Managing Payments Subject Area broken into Managing Payment Cancellations and Recording and Managing Manual Payments, which is only applicable to Commerce users.
6	DM	Setting up and Maintaining Suppliers	10/02/26		
7	IU	Managing IU Transactions	10/02/26		
8	IU	Processing IU Transactions	10/02/26		
▼ Planned Release Date 10/16/26			Count	4	
9	PR	Maintaining Payroll Adjustments	10/16/26		
10	PR	Managing Payroll Accounting	10/16/26		
11	PR	Processing Payroll	10/16/26		
12	PR	Setting Up and Maintaining Position Funding	10/16/26		

Preparing for Training

What are planned in-person sessions and when will they be held?

- ▶ Intended to supplement WBT, so participants will be required to complete all online WBT before attending
- ▶ Will have a cap per agency, so registration is through UAT Coordinators / Liaisons
- ▶ Will be recorded and made available for re-listening
- ▶ Each session will be a single day event



Session Topic	Dates
Florida PALM Fundamentals	10/7 & 10/8
Building Reports & Queries	10/19 – 10/23
Inter/IntraUnit Lifecycle	11/3 – 11/5
Deposit Lifecycle	11/9 & 11/10
FCO Project Lifecycle	11/12 & 11/13
Voucher Lifecycle	11/16 – 11/18
Payroll Lifecycle	11/30 – 12/3



Indicates that registration is now open!

Preparing for Training

What are planned virtual support sessions?

- ▶ Mondays from 2 – 3pm
- ▶ Target audience: DW/BI Authors that have questions and scenarios that they need some help working through
- ▶ Requested topics or questions should be shared by Friday, COB
- ▶ Sessions will be led by the DW/BI Team
- ▶ Tuesdays from 2 – 3:30pm
- ▶ Target audience: End Users that have completed WBT but just need some extra help
- ▶ Requested topics or questions should be shared by Friday, COB
- ▶ Sessions will be led by the TED Team, with functional team support

DW/BI Working Sessions

Learning Matters - Training Topics
Working Sessions



Knowledge Center Happenings and Other News

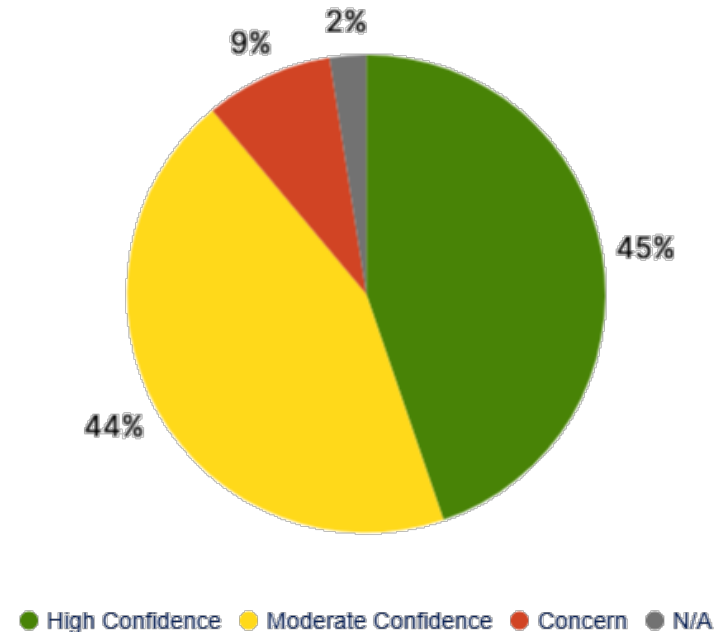
► Knowledge Center

- New [Training Resources](#) with Message Board – Follow for updates!
- [Deployment Planning](#)
 - New - [Cutover and Deployment Q&As](#) page
 - [Sample Communication - Payment Processing](#)
 - [Draft HR Email](#)
- Check the [Knowledge Center Change Catalog](#) to stay up to date on all KC changes.

► Agency Reporting

- Readiness Certification #4 - [Pulse Check 3](#) Dashboard has been published

Overall Confidence



No Thursday Task Talk next week



Task / Other Reminders

Friday, October 9

- ✓ 709 – Submit Configuration and Conversion Workbooks
- ✓ 710 – Complete Data Cleansing in Preparation for Dry Run 4

Monday, October 12

- ✓ Pulse Check #4

Wednesday, October 21

Sponsor Summit – *Now Registering*

Friday, October 30

- ✓ 602 – Update Agency Business Process Documentation
- ✓ 604 – Create Agency-Specific Learning Materials to Support End Users
- ✓ 623 – Create Agency Post-Implementation Support Plan

Friday, November 6

- ✓ 628 – Submit Readiness Certification #4
- ✓ UAT Ends

Testing Timeline

As of July 21, 2026



Questions?

Don't forget to send your testing questions in for tomorrow's UAT Office Hours



UAT Ends in November!

Help your agency meet its UAT objectives for Agency Readiness Certification #4

To support your testing efforts, the Project team has scheduled Office Hours for each Friday of the remaining weeks of user acceptance testing.

To add Office Hours to your calendar, visit the ***UAT Communication Page***

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