Florida PALM

Planning, Accounting, and Ledger Management



BLAISE INGOGLIA
CHIEF FINANCIAL OFFICER
STATE OF FLORIDA

THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

NOVEMBER 5, 2026

BLAISE INGOGLIA
CHIEF FINANCIAL OFFICER
STATE OF FLORIDA

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Agenda

- November Progress Report – What's New
- Readiness Certification #4
- Spill The Training Tea!
- Questions

694 – November Monthly Progress Report

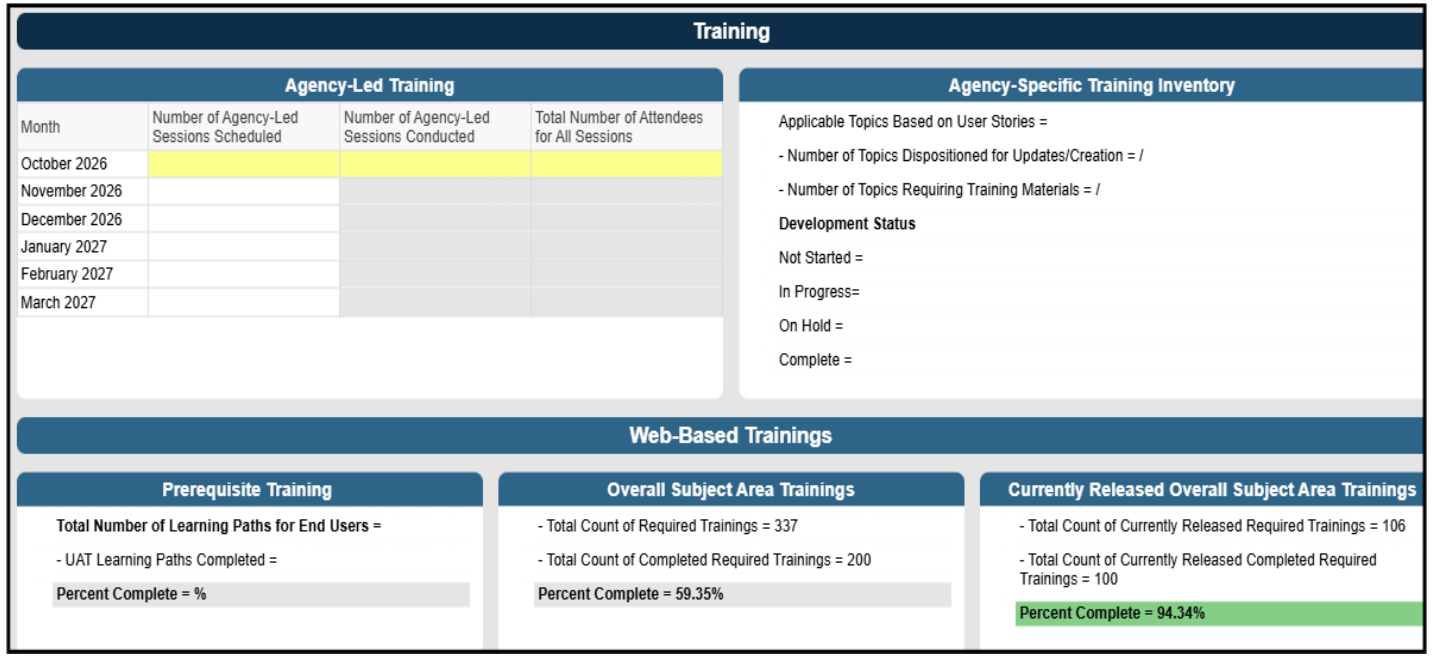
Due 11/30/26

- Dashboard updates are in progress, expected to be completed next week
- What's new?
  - No more reporting UAT/Interface testing progress.
    - User Story Inventory, User Story Activity Coverage and Interface Cycle 3 Testing worksheets will be archived
    - Interface Testing Cycle 3 section removed from Dashboard
  - UAT Execution section updated
    - Testing progress, Business Process Documentation removed
    - Proviso Requirements Questionnaire remains (due 11/6)
  - Data Readiness
    - Updated for Data Cleansing based on DR4 results
      - PCC001, PCC002, APC001 (all files), CTC001, GMC001 have been loaded to Secure File Share for agency review so far. Others to be added as they become available.

694 – November Monthly Progress Report

Due 11/30/26

- What's new?
  - Training –
    - Currently Released Overall Subject Area Trainings widget will be updated to include WBTs released on October 30 and November 6 after Readiness Certification tasks are submitted (dependency to certification criteria 1.1a)
    - Agency-Led Training Session widget added
    - Added more WBTs and the November in-person sessions



Training

Agency-Led Training

Month	Number of Agency-Led Sessions Scheduled	Number of Agency-Led Sessions Conducted	Total Number of Attendees for All Sessions
October 2026			
November 2026			
December 2026			
January 2027			
February 2027			
March 2027			

Agency-Specific Training Inventory

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /

- Number of Topics Requiring Training Materials = /

Development Status

Not Started =

In Progress=

On Hold =

Complete =

Web-Based Trainings

Prerequisite Training

Total Number of Learning Paths for End Users =

- UAT Learning Paths Completed =

Percent Complete = %

Overall Subject Area Trainings

- Total Count of Required Trainings = 337

- Total Count of Completed Required Trainings = 200

Percent Complete = 59.35%

Currently Released Overall Subject Area Trainings

- Total Count of Currently Released Required Trainings = 106

- Total Count of Currently Released Completed Required Trainings = 100

Percent Complete = 94.34%

694 – November Monthly Progress Report

Due 11/30/26

- What's new?
  - Project Management Section (Risks, Issues, Certification #3 Mitigation) removed
  - Cutover and Deployment section expanded
    - Cutover specific Risks & Issues – New worksheets (old Risk and Issue worksheets archived)

Cutover and Deployment

Cutover/Deployment Risks

Status	Date Opened	Date Closed	Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments
Open and Monitoring	05/06/25			Risk Title	Increasing	6 (Medium/High)	Detailed Risk Background	Detailed Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	

Cutover/Deployment Issues

Status	Date Opened	Date Closed	Priority	Category	Issue Title	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments
Open	09/26/25		Critical - Impacts the ability of the agency to move forward with work without resolution		Issue Title	Detailed Issue Background	Detailed Action Plan	08/28/26	

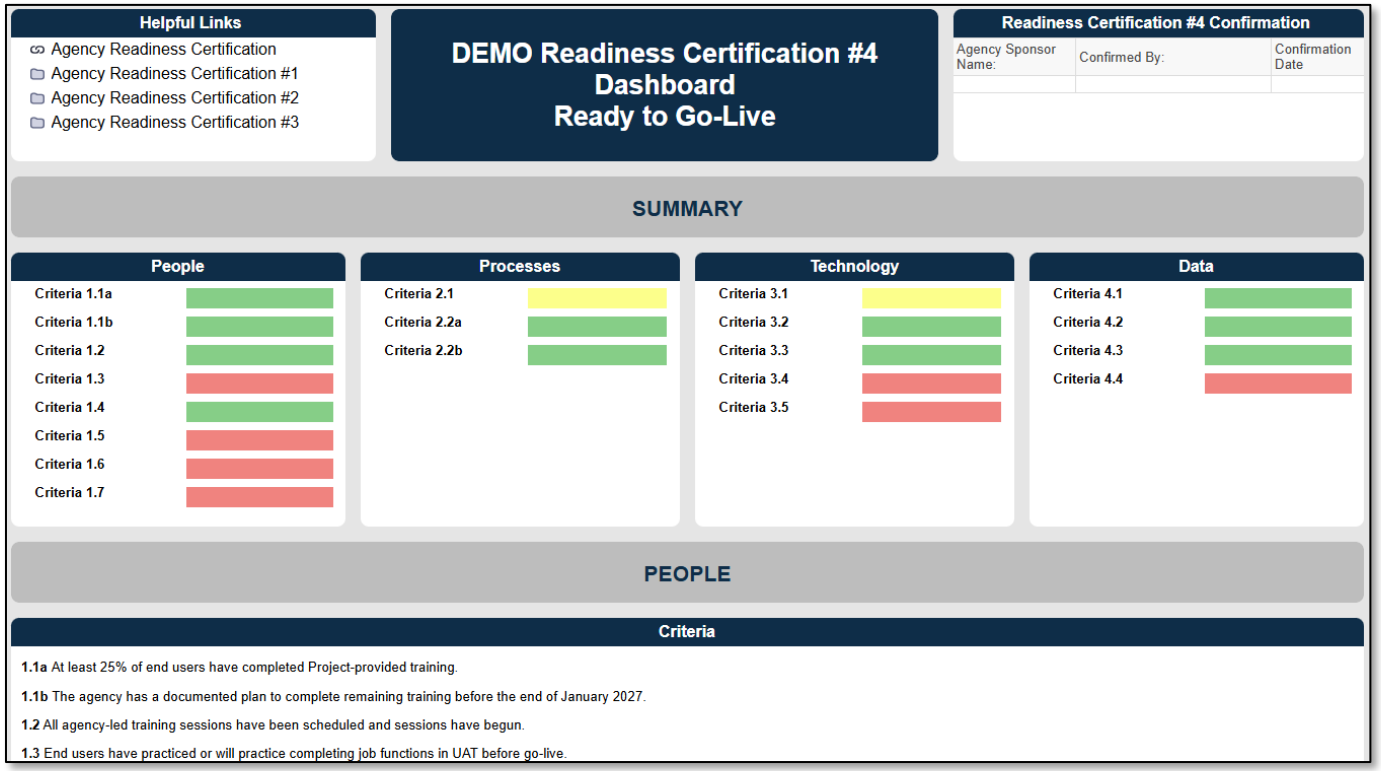
Readiness Certification #4 – Due 11/10

- Ready for Go Live - The culmination of all readiness and testing activities
- Hard close on 11/10
- Several worksheets/steps required for completion.
  - Confirm testing completion of agency critical business processes
  - Confirm testing completion of all interfaces, if applicable
    - Any ***interfaces not successfully tested*** by the time of the submission of this certification will not be available for use by the agency at go-live. Those interfaces ***will be deferred*** for agency use, unless otherwise approved by Project Leadership.
  - Confirm testing completion of critical reporting needs
  - Confirm agency-led training sessions
  - Confirm status of agency readiness certification criteria
    - If your agency is not facilitating agency-led training sessions, contact your Readiness Coordinator to have the “Criteria Met” selection updated to N/A.
  - Provide mitigation plans for any criteria not met
  - Submit Readiness Certification Dashboard

Readiness Certification #4 – Due 11/10

Dashboard Summary Widgets

- For most criteria
  - Met = Green
  - Not Met = Red
  - N/A = Gray
- For testing completion of Processes (2.1), Interfaces (3.1) and Reporting Needs (4.4)
  - 100% = Green
  - 75%-99.99% = Yellow
  - Less than 75% = Red
    - Calculations are based on responses in related worksheets

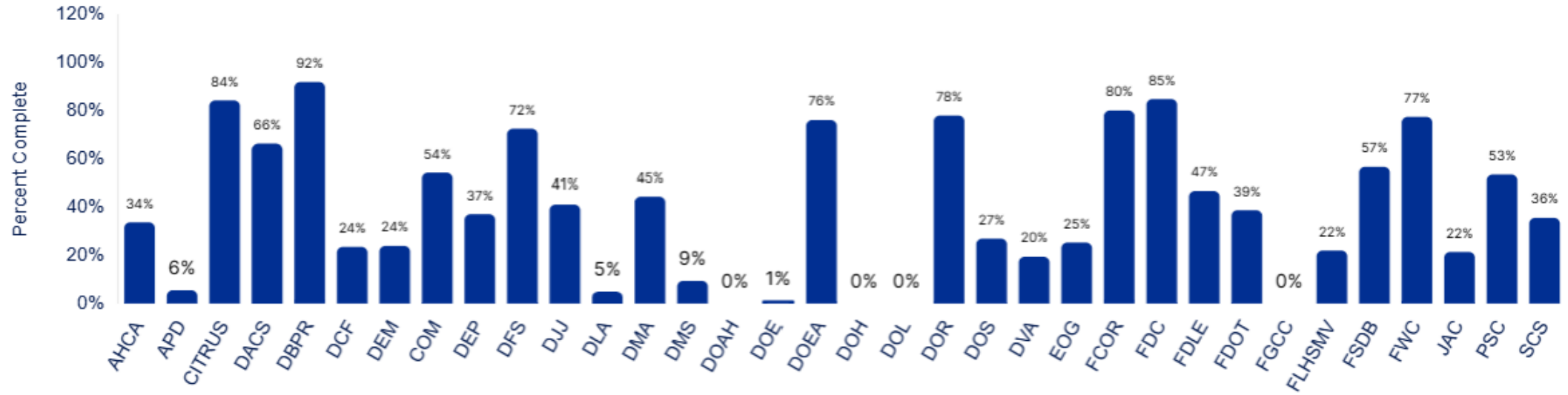




It's Training Time!

- This week – *Understanding the Inter/IntraUnit Lifecycle*
- Next week
  - *Understanding the Deposit Lifecycle (11/9 and 11/10)*
  - *Understanding the FCO Project Lifecycle (11/12 and 11/13)*
- Mondays – *DW/BI Virtual Support Session*
- Tuesdays – *Learning Matters Virtual Session*

Percent Complete of WBT released 10/2 and 10/16



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Training Activities

Web Based Training – Releasing this week

BPG	Subject Area	Planned Release Date	Actual Release Date
AAM	Deploying and Maintaining Assets	11/06/26	
AAM	Managing Assets	11/06/26	
AAM	Managing Imported and Manually Added Assets	11/06/26	
AAM	Performing Physical Inventory	11/06/26	
AAM	Setting Up and Maintaining Asset Controls	11/06/26	
AMFR	Monitoring Source Module Reconciliations	11/06/26	11/04/26

Tasks / Other Reminders

Friday, November 6

- ✓ **UAT Ends**
  - Proviso questionnaire should be complete

Tuesday, November 10

- ✓ 628 –Readiness Certification #4

Friday, November 13

- Last day to submit SOD forms to A&A for end user load for go-live

Friday, November 30 – Final Workbook Submissions

- ✓ 714 – Submit Configuration and Conversion Workbooks
- ✓ 711 – Submit Role Mapping

No Task Talk next week, November 12

- Last Task Talk is November 19
- December - Task Talks will transition to **Getting To Go Live** weekly virtual session

Tasks / Other Reminders

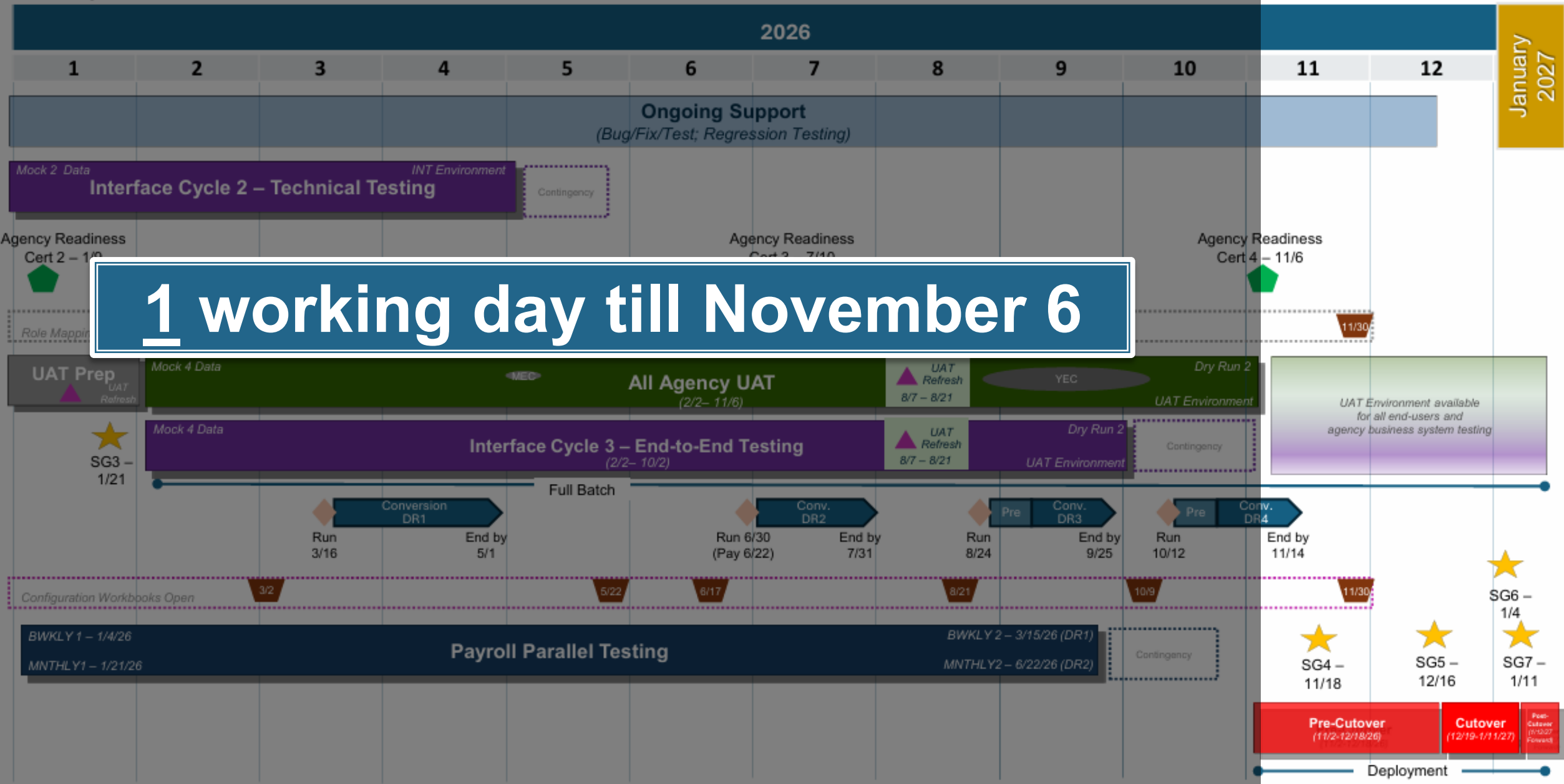
Data Type	Due Date	Impact
Agency Supplier Record	11/6/2026	This is the final date to request any updates or changes to an Agency Supplier Record. Requests must be submitted via UAT ticket. ***Any changes identified after this date will need to be addressed after go-live.***
Projects	11/13/2026	Projects must be entered in FLAIR by this date to be included in the final refresh of an agency's PCC001- Project workbook, which is used for the PCC001 Projects Conversion. ***Projects created after this date will not be included in an agency's workbook and will not be included in final conversion at cutover.***
Grants	11/13/2026	Grants must be in FLAIR by this date to be included as a valid ChartField in an agency's Configuration Lookup Values in Smartsheet, making the Grant ID available to be used in SpeedKeys and mapping worksheets.
Grants, Contracts and Suppliers	12/4/2026	Final date for additions or updates to Grants, Contracts, and Suppliers in FLAIR to be included in conversion for go-live. ***A freeze will be implemented for these data types; no new grants, contracts or suppliers can be added beyond this date.***

Date	Description
11/13/2026	Project completes final data pull from FLAIR and People First for updated values for agency confirmation workbooks.
11/20/2026	Project provides refreshed workbooks based on the final data pull.
11/30/2026	Agencies must have responded to refreshed data and cleared any error messages.

Testing Timeline

As of July 21, 2026

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1 working day till November 6

Questions?

Don’t forget to send your testing questions in for the FINAL UAT Office Hours tomorrow

FRIDAYS THRU NOVEMBER 6th



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***

Contact us

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Project Website

www.myfloridacfo.com/floridapalm/

Knowledge Center

https//:myfloridacfofloridapalm.us.document360.io

Knowledge Center

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