

<b>Project Team:</b>	Florida PALM Reporting and Data Services
<b>Period:</b>	July 1, 2021 – September 30, 2021
<b>Submission Date:</b>	October 8, 2021

# 1 - PROJECT STATUS OVERVIEW WITH KEY HIGHLIGHTS

## A. Overview of reporting activities for the current period:

During the first quarter of the fiscal year 2021-22, the Project completed the following activities related to reporting and data.

- With the launch of Florida PALM at CMS Wave, all Florida PALM users have access reports and queries related to their assigned roles.
- The Project updated the [Florida PALM website](#) to highlight resources available to users. The *User Support* page identifies job aids and training materials available to users. For example, the *Query Writer Overview* and other training are available in the People First Learning Management System, and can be accessed on-demand, and repeated as needed. Users may also refer to the [Reports Catalog](#) to identify available reports and the path to access the report in Florida PALM. DFS and Agency Query Writers were provided access to a Data Dictionary to assist in their use of Florida PALM reports, and the creation or modification of queries.
- During this quarter, agencies submitted requests to the Solution Center for assistance related to reports or queries: accessing or finding applicable reports; identifying available resources; questions about data elements or report logic; and requests for new or updated reports or queries. Of these requests, all were satisfied, or have on-going activities to provide a solution. For example, a new report is being developed and tested to meet an agency request for a single report to manage CRA bank statements.
- The Project hosted User Support Labs (USLs) during this quarter. These USLs were offered and held to assist agencies with questions or problem-solving issues for using Florida PALM. These discussions included review of reports and queries, exploring Florida PALM functionality, and understanding the data elements and terminology.
- The Project published a Pathfinder tool to assist agencies in understanding and evaluating how they will use Florida PALM functionality beginning at Financials Wave. This tool links the business processes, legacy terminology for key activities, and the related interfaces, conversions, and report topics.
- The Project began a new series of Module Workgroups to review planned functionality and resources (e.g., the Pathfinder, business process models, and file layouts) available to agencies for Financials Wave. Module Workgroup sessions were held or scheduled for the following modules: Accounts Payable/Purchase Order, General Ledger, and Accounts Receivable/Billing. These on-going sessions include an overview of module functionality by business process and discussion of key interfaces, conversions, and reports. Sessions are scheduled twice a week through the end of December 2021. Recorded sessions are available on-demand from the [Florida PALM website](#).

# 2 - PROJECT PROGRESS

The [Reports Catalog](#) describes the reports planned for Financials Wave. Activities are on-going to validate user information needs and the planned reports.