

Project Team:	Florida PALM Reporting and Data Services
Period:	January 1, 2021 – March 31, 2021
Submission Date:	April, 5, 2021

1 - PROJECT STATUS OVERVIEW WITH KEY HIGHLIGHTS

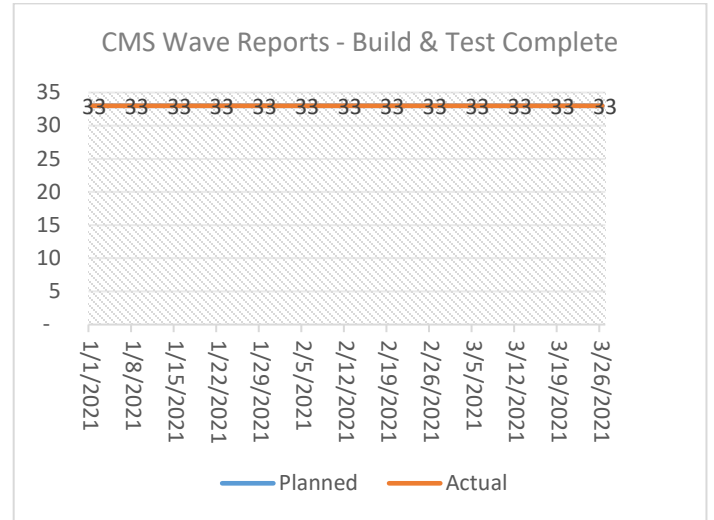
A. Overview of reporting activities for the current period:

During the third quarter of the fiscal year 2020-21, the Reporting and Data Services team completed the following activities related to satisfying the Proviso requirements.

- The [Reports Catalog](#) was updated to include the reports planned through 2024. Reports will be added for Payroll Wave when applicable design work is completed. Navigational information was included to assist users in finding specific reports in Florida PALM.
- Design build and system test activities were completed for CMS Wave reports. User acceptance is on-going, and use of reports is included as part of these activities.
- Design and build activities are on-going for the reports planned for Central Wave. These activities are scheduled to continue through April 2021, and then testing is planned through July 2021.
- A new Reporting Workgroup was created. This group includes the following agencies: DBPR, DOH, FLHSMV, DLA, DMS, FDOT, EOG, DACS, LEG, and FDLE. The DFS Division of Accounting and Auditing was also invited to participate. Some of these agencies participated in the original group, while others are new to the Workgroup. These agencies were asked to participate in review of the Central Wave and Departmental Wave reports. The Workgroup will discuss reporting needs and planned functionality. Feedback will be used by the Project in completing the *Reporting Assessment*, required by proviso, and in completing report designs. The first meeting is scheduled for April 14. [Workgroup materials](#) will continue to be published on the Florida PALM website, under the Meetings and Workshops tab.
- Beginning in March 2021, the Project has supported the Grants Life Cycle Workgroup organized by DCF. This Workgroup includes the following agencies: DCF, AHCA, DEO, DEP, DOH, DOR. The Workgroup is reviewing Florida PALM functionality, the implementation approach for grants and projects, considerations for agency business systems, and the related data and reporting needs. Accenture shared a demonstration of Peoplesoft functionality applicable to a grant life cycle. The Workgroup will share feedback with the Executive Steering Committee for consideration for the April 28 meeting.
- The Project published Florida PALM training for users in CMS Wave for general topics and relevant business processes. This training is available in the PeopleFirst Learning Management System, and is accessible to any interested parties. The training includes instruction for running inquiries, queries and reports.
- The Project continues to highlight change impacts with agencies for reporting as part of various engagements, such as Office Hours and Workgroup meetings. Some of the key change impacts for agency consideration are the following:
 - Currently, agencies rely on multiple reporting tools and data sources external to the accounting system for meeting information and reporting needs. With Florida PALM, users and decision makers will have access to reporting tools and up-to-date data within the accounting system.
 - Information can be accessed using a variety of tools in Florida PALM. For example, a user may look up specific information using an online inquiry. Drilldown functionality, dashboards and work centers will also be new sources of information. The user can schedule or run a query or report, and view the information within Florida PALM, or obtain the information from Florida PALM for external use in a variety of formats.
 - Agencies may choose to save reports and distribute reports to external users, but will be required to maintain controls needed to ensure access to sensitive information is limited to authorized users.
 - All roles have access to reports in Florida PALM. Additionally, a Reporter role offers inquiry-only access for users that need access to information.
 - Agencies may assign users to a Query Writer role to create and share queries for agency-specific needs.

2 - PROJECT PROGRESS

CMS Wave Reports Status	
Wave	CMS
Total Number of Reports	49
Total Custom Reports	33
Report Design Progress	
Designs	33 completed
Report Development Progress	
Build and Unit Tests	33 completed
Report Implementation Progress	
Go-Live Date	July 2021



Central Wave Reports Status	
Wave	Central
Total Number of Reports	132
Total Custom Reports	105
Report Design Progress	
Designs	5 completed
Report Development Progress	
Build and Unit Tests	0 started
Report Implementation Progress	
Go-Live Date	July 2022

