

### Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for LEG
- Readiness Workplan

# LEG Status Report Dashboard

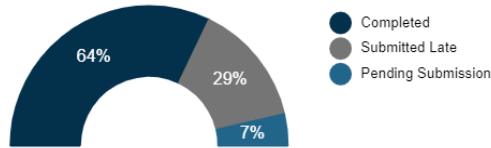
### Reporting Period

November - December 2023

### Agency Sponsor

Lisa Swindle

### Readiness Workplan Tasks



Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

### Readiness Workplan Tasks:

**Total Tasks = 14**

- Completed = 9
- Submitted Late = 4
- Pending Submission = 1

### RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/13/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/08/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	11/21/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/12/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24			
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

### People

The staff and stakeholders affected by your agency's transition to Florida PALM.

### Processes

The sequence of procedures to accomplish a business objective.

### Technology

The applications or tools used to process, track, or report on financial operations.

### Data

Information used in or produced from an agency's financial business operations.

The dials below include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

### Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 10
- Vacant Role = 0



The Change Champion Network dial reflects the completeness of your CCN makeup.

### Participation:

- Meetings Attended = 4
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

### Implementation:

- Training = TBD

### Current-State:

**Cataloged Business Processes = 119**

- Related Business Systems = 13
- Related Reports = 24
- Documentation Status:**
  - Complete = 119 Partial = 0 Not Started = 0

### Implementation:

- Role Mapping = TBD

### Current-State:

**Cataloged Business Systems = 16**

- Criticality:**
  - High = 10 Med = 1 Low = 1 None = 1
- Documentation Status:**
  - Complete = 12 Partial = 1 Not Started = 0

**Cataloged Interfaces = 9**

- Inbound Interfaces = 3
- Outbound Interfaces = 5

### Implementation:

**Business Systems Planned for Integration = 6**

- Segment I - Documentation Updates:**
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- Segment II - Documentation Updates:** TBD
- Segment III - Documentation Updates:** TBD
- Segment IV - Documentation Updates:** TBD
- Planned Interfaces = 3**
  - Inbound Interfaces = 0
  - Outbound Interfaces = 1
  - Spreadsheet Uploads = 2

### Current-State:

**Unique FLAIR Data Elements = 105**

- Associated Unique Uses = 106**
  - Continued Use - Yes = 14
  - Continued Use - No = 0
- Associated Business Systems = 13**
- Cataloged Reports = 77**
- Criticality:**
  - High = 42 Med = 23 Low = 6 None = 0

### Implementation:

- Conversions = TBD
- Configurations = TBD

## Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

LEG RISKS

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
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LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not possess, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hire F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

LEG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
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LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
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Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

Confirm \*

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	01/12/24
September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	11/09/23
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23