

What are Resources that we can reference to prepare ourselves?

Here are some of the many resources at your fingertips:

Florida PALM Website

- Readiness Workplan and Agency Implementation Roadmap
- Business Process Model review session recordings
- PALMcast #11 - The Design Phase
- Session materials posted in advance of meetings

Florida PALM Knowledge Center

- Business Process Models, Reports and Interfaces Layouts
- "How to Read a Business Process Model" Video
- Chart of Accounts Design materials
- Budget Structure Design materials

Smartsheet

- Florida PALM Resources (catalogs) - Interface Catalog, Conversions Catalog, Reports Catalog, Data Dictionary

This Guide covers:

- What are design workshops and why are they important to attend?
- Who should attend and what are our expectations of them?
- When will they be held and what sort of time should we set aside?
- What are resources that we can reference to prepare ourselves?



Scan to access Florida PALM's website for more information

<https://www.myfloridacfo.com/floridapalm>

Explore the Florida PALM Knowledge Center
<https://www.myfloridacfo.com/floridapalm/knowledge-center>

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An Agency's Guide to Preparing for Florida PALM Design Workshops



What are Design Workshops and why are they important to attend?

They support your knowledge of Florida PALM's design to help with your agency's business process changes and business system remediation. You can expect the following when you attend:

- Demonstrations of the "look and feel" of some system functions
- Learning the "how" of Florida PALM business processes
- Preview of the reports that will support the business processes
- Discussions on both agency-provided and enterprise conversions and configurations
- Conversations on interface layouts
- Q&A regarding the design elements and materials being covered in the Segment

Who should attend and what are our expectations of them?

Design Workshops should be attended by **Business Liaisons, Technical Liaisons, Subject Matter Experts (SMEs), and agency business system owners** that are impacted by the business processes being covered.

Before - You should review the BPMs and associated interfaces and reports layouts found on the **Florida PALM Knowledge Center**, as well as any other meeting materials posted to the **Florida PALM Website** prior to the meeting.

During - You should follow along with the meeting materials and engage - ask questions, take notes, meet others.

After - You should share what you learned with others in your agency and use the knowledge to aid in the completion of your agency's RW tasks.

Your support is critical for your agency's readiness (people, processes, technology, and data) and will most immediately help you with current and future Readiness Workplan tasks, including:

- Update Agency Business System Documentation (by segment)
- Update Florida PALM Interface Inventory (by Segment)
- Update Florida PALM Conversion Inventory (Segment II - IV)
- Complete Configuration Workbooks (by Segment)
- Complete Data Readiness Analysis and Data Cleansing Activities (by Segment)
- Identify Change Impacts and Update Agency Business Process Documentation (by Segment)
- Remediate Agency Business Systems (by Segment)



When will they be held and what sort of time should we set aside?

Segment Design Workshops are multi-day sessions held at the conclusion of each of the four design segments. In addition, a comprehensive design recap is planned at the conclusion of the Design Phase to provide an all-inclusive, end-to-end review of the final design for Florida PALM. The time commitment should include pre-meeting materials review, session attendance time, and follow-up / debrief with others in your agency.

For more information and details, visit the Design Meetings page on the Florida PALM website. <https://www.myfloridacfo.com/floridapalm/design-meetings>

