Task Instructions

Task ID: *327*
**Wave**: *Financials and Payroll Waves*
Task Name: *Complete Reports Inventory*
Task Type: *Business Processes, Conversions, Reporting, Security*
Task Due Date: *July 28, 2023*

Task Overview

Florida PALM is a business transformation that will affect your agency's people, processes and technologies (systems). At the core of those is the data used or produced to support your agency's business operations and reporting needs. In order to prepare for your agency's business transformation, a solid understanding of your current business practices, including the processes used, the people involved, and the systems used is the starting point. By having your current business state fully documented to include your reporting needs, you will be better prepared to complete future business transformation tasks such as mapping change impacts, identifying future reporting needs and completing business system remediation.
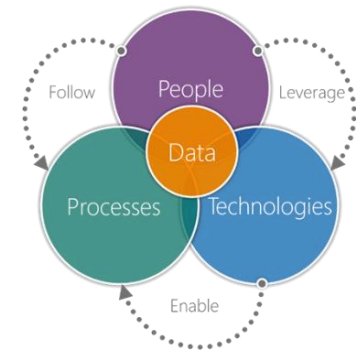
Understanding and documenting reports containing FLAIR data is critical for a successful transition to Florida PALM. These reports include what your agency produces and consumes. This task is an opportunity to capture any agency report that uses FLAIR data elements for internal and external users. For the purposes of this task, reports can include information formatted for printing or publishing, data queries and extracts, or online inquiries.

In this task, you will compile a comprehensive list of current reports that contain FLAIR data elements you referenced in RW Task 324 – Complete FLAIR Data Elements Inventory. Columns are provided in Smartsheet to describe each report's usage, frequency, purpose and a few other general specifications. In future tasks, your agency will be asked to review and compare this list of current reports using FLAIR data elements to Florida PALM reporting design specifications.

As you complete this task, additional data elements or variations in the purpose of a data element may be identified. Continue to update your agency's FLAIR Data Elements Inventory in Smartsheet with new data elements or uses throughout these current state activities. Business process documentation may also be uncovered while working through this task. Take note of those discoveries for the upcoming task (RW Task 328) that asks your agency to document current business processes that use FLAIR data and components.

Reports Inventory

A new folder and worksheet have been added to your agency's Inventory Workbook in Smartsheet. The Report Inventory folder contains the Current-State Reports worksheet you will complete for this task. In the Current-State Reports worksheet, you will document all the current reports that your agency generates and/or uses that include FLAIR data and identify:

- Report Name
- Report ID
- Description

- Purpose / Requirement
- Criticality
- Primary Report Owner(s)
- Key Users – Internal
- Key Users – External
- Frequency
- Source
- Agency Business System(s)
- FLAIR Data Element(s)
- Business Process Category
- Comments

To help you complete this task, the *Task 327 Resource: Smartsheet Columns* document provides detailed instructions, by column, for how best to complete the inventory worksheet in Smartsheet. Please refer to that document when completing this task.

How can agencies use this current-state reports inventory?

You will use the information captured in your Current-State Reports worksheet during future analysis of your agency's change management activities and tasks, specifically future tasks to make your agency's Florida PALM report selections. It's expected the inventory will be refined as future tasks are completed and additional information is learned. You will also use the information to support the creation of your agency's business process documents.

What will the Florida PALM Team do with this information?

To support this and future work, the Florida PALM team will use the completed Current-State Reports worksheet to gain a broad understanding of agencies' existing reports as we move into Design and Build phases of Florida PALM.

Task Instructions

Coordinate with your agency's Change Champion Network (CCN) and functional and technical subject matter experts familiar with your agency reports to complete this task. As your agency experienced with the preparation for the Personalized Agency Working Sessions, the list of divisions, offices, and individuals that use or access reports may be long. The most effective way to ensure a comprehensive inventory for your agency is to engage all stakeholders within your agency.

Please plan accordingly, from a timing, resource, and engagement perspective, to allow your agency time to complete the activity by the requested date. Throughout the task completion period, there will be Project-led meetings and touch points planned where your agency may seek clarification, or you may direct questions to your Readiness Coordinator (RC).

Review and complete the Current-State Reports worksheet that has been added to the Reports Inventory folder within your Inventory Workbook in Smartsheet. As a reminder, your Smartsheet Workbook is a protected series of workbooks and can only be updated by the staff you designated for Smartsheet updates. Smartsheet Resources are linked below, which can provide a refresher for how to access and use the tool. Export your worksheet to Excel to collaborate with report stakeholders. The Smartsheet should be updated with your agency's information by the requested due date.

Instructions	
1)	*With your CCN, determine an approach to review, understand, and document a comprehensive inventory of essential reports that contain FLAIR data.*
2)	*Complete the Current-State Reports worksheet in Smartsheet by July 28, 2023.*
3)	*Email the Florida PALM inbox and copy your Readiness Coordinator to confirm completion of the task.*
4)	*If you have questions regarding this task, participate or review the Tuesday Task Talk on Tuesday, April 4, 2023, or contact your Readiness Coordinator.*
5)	*Participate in future touch points / meetings (e.g., Tuesday Task Talks, Town Halls) related to this task.*
6)	*Prepare to discuss your agency's progress on this task during monthly touchpoint meetings with your RC.*

Supporting Materials & Resources:

- ***Task 327 Resource: Column Definitions***
- ***Agency Current-State Analysis Approach***
- ***Reporting Approach***
- ***FLAIR Manuals*** – *These provide descriptions of data elements and explain the system use.*
    - *100 FLAIR Fundamentals Manual*
    - *200 FLAIR Expenditure Manual*
    - *500 FLAIR Asset Management Manual*
    - *600 FLAIR Revenue Manual*
    - *900 FLAIR Reporting Manual*
    - *FLAIR Appendix*
    - *FLAIR Glossary*
- ***Report Distribution System (RDS) website***
- ***FLAIR Information Warehouse (IW) website***
- ***Smartsheet Resources*** – Documentation provided by the Florida PALM Project to support agency use of the Smartsheet tool
    - Smartsheet User Guide
    - Smartsheet Access Request
    - Smartsheet Job Aid