

Task Instructions

Task ID: 555-C

RW Task Name: *Complete Data Cleansing*
Based on Mock Conversion 1 (AMC001 and POC001)

Task Start Date: *November 8, 2024*

Task Due Date: *December 6, 2024*

Project Impact: *Direct*

Task Description

555-C: Complete Mock Conversion 1 results for AMC001 and POC001 and perform data cleansing activities to prepare data for Mock Conversion 2.

Task Overview

As described in the [Agency Data Readiness Guidance](#) document, agencies are responsible for evaluating and managing their data to ensure agency data readiness for conversion activities. This includes agency managed data in FLAIR and enterprise systems. You have prepared for conversion activities through a series of previous RW Tasks (514, 517, 526, 529, 542, and 545) requiring you to:

- Understand the planned conversions for Florida PALM;
- Identify which conversions are needed for your agency (i.e., some agencies do not have active customers or projects that need to be converted);
- Analyze your related data and develop an agency-specific Data Readiness Plan; and
- Perform data cleansing of the identified data groups to prepare for conversion activities (e.g., remove or inactivate all unnecessary information).

The Project is performing tests with agency data to see if it can be successfully converted into Florida PALM. This process is called Mock Conversion. The [Conversion Approach](#) describes how the Project will complete multiple cycles of Mock Conversion activities where agency data will be **extracted** from source enterprise systems (e.g., FLAIR and People First), **transformed** from the legacy data structure to the Florida PALM data structure, and **loaded** to Florida PALM.

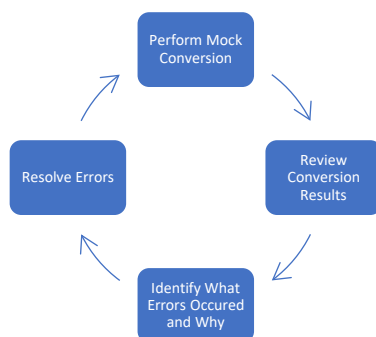


Figure 1: Mock Conversion Cycle

With each cycle of Mock Conversion, the Project will provide you with the results of the conversions for your agency through a series of related RW Tasks (555, 571, 587, 597). You must review your agency's result to understand the data that is being converted and the errors that occurred during the conversion, if any. This is your opportunity to perform additional data cleansing in the source systems to improve the success rate of the data load results for the next Mock Conversion cycle and ultimately for the final conversion at go-live in January 2026.

This task has been split into two manageable subtasks as described in the table below.

Table 1: Subtask Overview

Subtask	Subtask Overview	Planned Dates
555-A	Review the Conversion Approach to prepare for Mock Conversion activities. Review Mock Conversion 1 results for Projects - (PCC001), perform data cleansing and provide agency-specific conversion values.	Oct. 7, 2024 – Nov. 22, 2024
555-B	Review Mock Conversion 1 results for CTC001, GMC001, and PCC002 and perform data cleansing activities to prepare data for Mock Conversion 2.	Oct. 28, 2024 – Nov. 22, 2024
555-C	Review Mock Conversion 1 results for AMC001 and POC001 and perform data cleansing activities to prepare data for Mock Conversion 2.	Nov. 8, 2024 – Dec. 6, 2024

Task Elements

This task contains three parts:

1. Review the Mock Conversion 1 results for AMC001 and POC001.
2. Perform data cleansing in preparation for Mock Conversion 2, if applicable.
3. Report data readiness progress in Smartsheet.

Review Mock Conversion 1 Results

The Project has completed Mock Conversion 1 for the conversions listed below in Table 2. The data used for Mock Conversion 1 was as of September 7, 2024.

Table 2: Mock Conversion 1 List for Task 555-C

Conversion ID	Conversion Name	Source System	Applicable Agencies
AMC001	Assets and Property	FLAIR	All Agencies – <i>except JAC</i>
POC001	Open Encumbrances	MFMP, FLAIR	All Agencies – <i>except Citrus</i>

Conversion results are detailed for each applicable conversion for your agency. For each applicable agency, at a minimum, each conversion will have the four documents described below. These documents are shared in your Florida PALM Secure File Share Portal in the Conversion Workbook Inventory, Mock 1 folder. Within the Mock 1 folder, a corresponding folder has been created for each applicable conversion that contains the following documents:

1. **<Agency> <Conversion Name> Conversion Flat File** generated using your related data from the source system. This file is for information only.
2. **<Agency> <Conversion Name> Log File** generated from Florida PALM after your data was transformed and loaded.
 - *Agency action:* Review the log file for summary count of processed and rejected records. This log shows the total number of records extracted from FLAIR, total records successfully processed, and total records with errors.
3. **<Agency> <Conversion Name> Error File** generated from Florida PALM after your data was transformed and loaded.

- *Agency action:* Review the error file to understand your records with errors. The file indicates the record row in the Conversion Flat File and provides the field name that caused the error.
4. **<Agency> <Conversion Name> Record Extract** generated from Florida PALM after your data was transformed and loaded.
- *Agency action:* Review the record extract to view the records that successfully loaded into Florida PALM. This will help you understand how your data will look in Florida PALM.

Perform Data Cleansing

After reviewing your Mock Conversion 1 results, it is now time to cleanse your agency's data based on the conversion errors and your agency's Data Readiness Plan. You should reference the related supplemental guidance for the corresponding conversion, as well as the [Agency Data Readiness Guidance](#) document to support your understanding of the conversions, errors, and the necessary actions required. Using those documents, make the appropriate updates in the source system for each conversion applicable to your agency (AMC001 and POC001).

NOTE: *The data pull for Mock Conversion 2 is planned for 11/30/2024, as indicated in the [Testing Timeline](#). Agencies should attempt to complete data cleansing by that date, in order for the data cleansing efforts to be reflected in the Mock Conversion 2 results.*

Report Data Readiness Progress in Smartsheet

Your **<Agency> Mock Conversions** worksheet in Smartsheet contains a summary of your agency's mock conversion results. This worksheet will be used to include all summary data for all applicable conversions for all Mock Conversion cycles. With this worksheet, your agency can get a snapshot of the number of records converted for each conversion and the successful load percentage, as well as provide you with the opportunity to report progress on data cleansing effort.

For all applicable conversions, document the status of your agency data clean-up efforts in the Data Cleansing Status column in your **<Agency> Mock Conversion** worksheet.

Conversion Name	Mock 1 - Total Number of Records Received	Mock 1 - Successful Load Percentage	Mock 1 - Data Cleansing Status	Reviewed 10/07/24 Conversion Approach
PCC001 - Projects				
AMC001 - Asset and Property				
CTC001 - Contracts				
GMC001 - Grants				
POC001 - Open Encumbrances				
PCC002 - Projects Life-To-Date Balances				

Figure 2: Demo Mock Conversions Worksheet in Smartsheet

Table 3: <Agency> Mock Conversions Worksheet Columns

Column Name	Column Description	Field Value Input
Conversion Name	Name of the conversion, beginning with the Project-assigned RICEFW ID.	Project Provided
Mock 1 - Total Number of Records Received	Number of records received from the source system for the Mock Conversion.	Project Provided
Mock 1 - Successful Load Percentage	The percentage of records that successfully loaded for the Mock Conversion. The objective is to have a higher percentage each Mock Conversion cycle.	Project Provided
Mock 1 - Data Cleansing Status	<p>Agency reported status of data cleansing per Mock Conversion.</p> <p>Available Drop-Down Options:</p> <ul style="list-style-type: none"> <u>Not Applicable</u>: Select this value if the conversion does not apply to your agency. This would only be selected if there are no values in the <i>Total Number of Records Received</i> column. <u>In Progress</u>: Select this value if your data cleansing efforts have begun. <u>Complete</u>: Select this value if your data cleansing efforts are complete. 	Agency Indicated

Through the duration of this task, your agency should review your Data Readiness Plan to see how your agency planned for data cleansing and update as needed based upon ongoing data cleanup efforts. You may also reference the [Agency Data Readiness Guidance](#) for additional information and resources to support your data cleansing activities.

How will agencies use this information?

Your agency's business processes and agency business systems benefit from having good, clean data successfully converted to Florida PALM. The Mock Conversion and related data cleansing activities provides you with the understanding of your agency's current data readiness status and provides you with an understanding of the data that will be available in Florida PALM at go-live.

What will the Florida PALM Team do with this information?

This task has a direct impact on the Florida PALM Project for mock conversion activities. The updates you make to your agency data in the source systems will directly impact the conversion success rate in Mock Conversion 2. The data for Mock Conversion 2 will be as of November 30 and reflect your agency's information in FLAIR as of November 30. The results of Mock Conversion 2 will be shared with you during RW Task 571.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 4: Task Completion Rubric

Task Completion Rubric
In the Mock Conversions workbook in Smartsheet, for AMC001 and POC001, a Mock 1 – Data Cleansing Status of 'Complete' has been selected or 'N/A' if the conversion is not applicable to your agency.
Task tracker must be marked as 100% complete.

Task Instructions

Collaborate with your Change Champion Network and Functional and Technical subject matter experts to understand the approach to conversion activities. Review the conversion errors and provide a data cleansing status in your <Agency> Mock Conversions worksheet in Smartsheet.

SharePoint Navigation:

Florida PALM Secure File Share Portal > (Agency) Folder > Conversion Workbook Inventory > Mock 1

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Inventories > Conversion Inventory > Mock Conversions

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 4 above.

Table 5: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Review the conversion results and complete data updates in source systems, as necessary.
2) Review your Data Readiness Plan and update, as necessary.
3) Provide your Data Cleansing Status in your Mock Conversions Worksheet in Smartsheet.

Summary of Task Completion Steps

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| 4) <i>Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.</i> |
| 5) <i>Complete task by December 6, 2024.</i> |
| 6) <i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i> |
| 7) <i>If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.</i> |

Supporting Materials & Resources:

- [Conversion Approach](#)
- [Agency Data Readiness Guidance](#)
- Supplemental Documents