

Task Instructions

Subtasks ID: 658-B

Task Name: *Submit Data Field Mapping (OCA)*

Task Start Date: December 18, 2024

Task Due Date: February 14, 2025

Project Impact: Direct

Task Description

Complete and submit data field mapping to support conversion activities.

658-B: Complete and submit mapping of FLAIR OCA codes to Florida PALM values to support conversion activities.

NOTE: *The following agencies do not have OCA Mapping: DOAH and PSC and are not required to complete this task.*

Task Overview

This task relies on data provided by agencies in previous RW tasks, specifically configurations values for OA1 (RW Task 567-C) and OA2 (RW Task 567-D) and confirmation of Project IDs (RW Task 555-A). If your agency has not been verified as complete for those previous RW tasks, your <Agency> Field Mapping – Other Cost Accumulator worksheet will be locked from editing until those tasks are verified complete. If your Tasks were submitted late or had to be returned for correction, this can also delay the unlocking of your worksheet.

Data conversion refers to the activities of **extracting** and **transforming** legacy data and **loading** it to Florida PALM. Florida PALM will use legacy data from FLAIR and enterprise systems to populate opening balances in the General Ledger and many other pieces of data needed to support operations at go-live. Data conversion is a shared responsibility between the Florida PALM Project (Project) and agencies.

Conversion activities require accurate field data mapping of legacy data to Florida PALM. To support the understanding of conversion mapping, the Project has provided the Excel file, titled ***Agency Conversion Field Mapping Spreadsheet***, in the Knowledge Center on the [Conversion Catalog](#) page. This task requires agencies to confirm the mapped values of FLAIR Organization, OCA, Location Code, and Grant ID, which are required in agency conversions.

This task (Task 658) has been separated into multiple subtasks for ease of data management and agency progress reporting. Each subtask represents a separate field mapping workbook. Subtasks A-D are described below in Table 1.

Table 1: Field Mapping RW Subtasks

Subtask	Configuration Workbook Description	Planned Dates
658-A	Agencies will be required to review and update mapping of FLAIR Org values to Florida PALM Organization values.	Dec. 18, 2024 – Feb. 14, 2025
658-B	Agencies will be required to review and update mapping of FLAIR OCA values to Florida PALM values.	Dec. 18, 2024 – Feb. 14, 2025
658-C	Agencies will be required to review and update mapping of FLAIR Grant ID values to Florida PALM values.	Jan. 6, 2025 – Feb. 14, 2025

Subtask	Configuration Workbook Description	Planned Dates
658-D	Agencies will be required to review and update mapping of FLAIR Location Codes values to Florida PALM Location Code values.	Feb. 3, 2025 – March 14, 2025

Task Elements

Some agencies have chosen to map FLAIR OCA Codes to Florida PALM OA1 values, while other agencies have chosen to use the OA1 ChartField for other purposes. Agencies had the opportunity to provide a mapping of FLAIR OCA Codes to Florida PALM OA1 values in the previous RW task to submit agency specific configuration values (RW Task 513). You then provided necessary updates and confirmation of agency needed Florida PALM OA1 configuration values in RW Task 567-C.

A new worksheet, *<Agency> Field Mapping – Other Cost Accumulator*, has been added to the Conversion Inventory folder of your Agency Workspace in Smartsheet. If you provided a mapping of FLAIR OCA Codes to Florida PALM OA1 values during RW Task 513, that mapping has been prepopulated in your *<Agency> Field Mapping – Other Cost Accumulator* worksheet. You must review the mapping and update as necessary.

If you did not provide a mapping of values with RW Task 513, you must provide a mapping using this task. All FLAIR OCA Codes provided in the worksheet must be mapped to a valid Florida PALM value or marked as not valid.

Your worksheet is pre-populated with FLAIR OCA Codes that were found in the following active record types in FLAIR as of November 30, 2024:

- GL Balances
- Assets
- Encumbrances (with balances)

A supplemental Excel document is attached to the top row of your *<Agency> Field Mapping – Other Cost Accumulator* worksheet. This supplemental document provides a listing of the active records that were pulled from FLAIR on November 30, 2024, that included the FLAIR OCA Codes listed in your worksheet. Use this supplemental document to support your understanding of how the FLAIR values are being used for Florida PALM conversion items.

Value Mapping Confirmation	FLAIR OCA	Mapped Florida PALM OA1	Map To Florida PALM Data Type	Update Mapping to Florida PALM OA1	Update Mapping to Florida PALM OA2	Update Mapping to Florida PALM Contract ID	Update Mapping to Florida PALM Grant ID	Update Mapping to Florida PALM Project ID	Comments
Yes - Mapping is Correct									
Yes - Mapping is Correct									
Remove - FLAIR OCA Not Valid									
Update Mapping									

Figure 1: Conversion Mapping – Other Cost Accumulator Worksheet

The *<Agency> Field Mapping – Other Cost Accumulator* worksheet contains the following columns:

- Value Mapping Confirmation (Required for all rows of data)

- Select the appropriate option from the drop-down.
 - Yes – Mapping is Correct: Select this option if the provided 'FLAIR OCA Code' and 'Mapped Florida PALM OA1' is correct and no changes are needed.
 - Remove – FLAIR OCA Not Valid: Select this option if the FLAIR OCA Code is no longer valid or active, therefore a mapping is not needed.
 - If you select this option, you must update any related records (see the supplemental document) containing the OCA Code in FLAIR so that the record will include a valid OCA Code in the next conversion data pull.
 - Update Mapping: Select this option if:
 - The provided mapping is incorrect, and you need to provide a different Florida PALM value, or
 - There is no mapping provided, therefore you must provide the mapping to a Florida PALM value.
- FLAIR OCA (Locked from editing)
 - This column is prepopulated to include FLAIR OCA Codes for your agency as of November 30, 2024, that are included in the following active record types:
 - GL Balances
 - Assets
 - Encumbrances (with balances)
- Mapped Florida PALM OA1 (Locked from editing)
 - This column contains a mapping to the new Florida PALM OA1 value, if you previously provided a mapping for OA1 codes with RW Task 513 **and** the mapped Florida PALM OA1 value is still a valid configuration value based on your RW Task 567-C submission.
 - The column is intentionally left blank if a mapping **was not provided** in RW Task 513.
- Map to Florida PALM Data Type (Required if "Update Mapping" is selected in the Value Mapping Confirmation column)
 - Select the appropriate drop-down option to identify the data type the FLAIR OCA will be mapped to in Florida PALM. Options include:
 - OA1
 - OA2
 - Contract ID
 - Grant ID
 - Project ID
- Update Mapping to Florida PALM OA1 (Required if "Update Mapping" is selected in the Value Mapping Confirmation column and "OA1" is selected in the Map to Florida PALM Data Type Column)
 - This column contains a prepopulated drop-down list that includes all Florida PALM OA1 values confirmed in the recent configuration task RW 567-C.
 - Select the correct Florida PALM OA1 value that should be mapped to the provided FLAIR OCA code.
- Update Mapping to Florida PALM OA2 (Required if "Update Mapping" is selected in the Value Mapping Confirmation column and "OA2" is selected in the Map to Florida PALM Data Type Column)
 - This column contains a prepopulated drop-down list that includes all Florida PALM OA2 values confirmed in the recent configuration task RW 567-D.

- Select the correct Florida PALM OA2 value that should be mapped to the provided FLAIR OCA code.
- Update Mapping to Florida PALM Contract ID (Required if “Update Mapping” is selected in the Value Mapping Confirmation column and “Contract ID” is selected in the Map to Florida PALM Data Type Column)
 - This column contains a prepopulated drop-down list that includes active contracts in FLAIR, subject to conversion, as of November 30, 2024.
 - Select the correct Contract ID that should be mapped to the provided FLAIR OCA code.
- Update Mapping to Florida PALM Grant ID (Required if “Update Mapping” is selected in the Value Mapping Confirmation column and “Grant ID” is selected in the Map to Florida PALM Data Type Column)
 - This column contains a prepopulated drop-down list that includes active grants in FLAIR subject to conversion as of November 30, 2024.
 - Select the correct Grant ID that should be mapped to the provided FLAIR OCA code.
- Update Mapping to Florida PALM Project ID (Required if “Update Mapping” is selected in the Value Mapping Confirmation column and “Project ID” is selected in the Map to Florida PALM Data Type Column)
 - This column contains a prepopulated drop-down list that includes active Project IDs in FLAIR that agencies have confirmed for conversion in previous RW Task 555-A.
 - Select the correct Project ID that should be mapped to the provided FLAIR OCA code.
- Comments (Optional for agency use)

Below are a few helpful considerations to support your task completion:

- All FLAIR OCA Codes provided in this worksheet must be mapped to one and only one Florida PALM value, if not identified as ‘Remove – FLAIR OCA Code Not Valid’.
 - You will need to take action in FLAIR on any items marked ‘Remove – FLAIR OCA Code Not Valid’ or the value will appear in future conversions.
 - The data fields a FLAIR OCA Code can be mapped to are optional fields in the related Florida PALM conversions for assets, encumbrances, and GL balances. If a FLAIR OCA Code mapping is not provided, the conversions will load successfully; however, the level of detail recorded in FLAIR will not be captured in Florida PALM.
- A single Florida PALM value can be mapped to multiple FLAIR OCA Codes.
- The FLAIR OCA Codes included were pulled from FLAIR as of November 30, 2024. The provided FLAIR OCA Codes are not representative of all active codes. The provided list only includes those FLAIR OCA Codes that are found in active records subject to conversion (Assets, Encumbrances and General Ledger Balances.)

How will agencies use this information?

Agencies will use the FLAIR OCA to Florida PALM value mapping to validate future Mock Conversion results. The mapping can also be used to support your end user understanding of the data change from the FLAIR OCA Code to the new Florida PALM value.

What will the Florida PALM Team do with this information?

The FLAIR OCA Code to Florida PALM value mapping has a direct impact to the following conversions that require mapping from the FLAIR OCA:

- AMC001 – Assets and Property
- POC001 – Open Encumbrances
- GLC001 – Ledger

The Florida PALM team will update the FLAIR OCA to Florida PALM value mapping, which will allow conversion records to be created in Florida PALM with the level of detail that is recorded in FLAIR today. The Project team will also review your task submission based on the following criteria to confirm completion:

Table 2: Task Completion Rubric

Task Completion Rubric
The <i>Value Mapping Confirmation</i> column has a selection for all rows of data.
"Update Mapping" or "Remove – FLAIR OCA Not Valid" is selected in the <i>Value Mapping Confirmation</i> column where a Florida PALM OA1 value is not prepopulated in the <i>Mapped Florida PALM OA1</i> column.
If "Update Mapping" is selected in the <i>Value Mapping Confirmation</i> column, a selection has been made in the <i>Map to Florida PALM Data Type</i> column.
For all selections in the <i>Map to Florida PALM Data Type</i> column, a valid value is selected in the coordinating value column. For example, if "Grant ID" is selected in the <i>Map to Florida PALM Data Type</i> column, a valid Grant ID value is selected in the <i>Update Mapping to Florida PALM Grant ID</i> column.

Task Instructions

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Conversion Inventory > Agency Conversion Mapping – Other Cost Accumulator

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 2 above.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Collaborate with your CCN and functional SMEs to review and update the Agency Conversion Mapping – Other Cost Accumulator Workbook.
2) Perform any necessary data cleanup in FLAIR for values where you have indicated "Remove – FLAIR OCA Not Valid".
3) 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.
4) Complete task by February 14, 2025 .
5) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
6) If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- Agency Conversion Field Mapping Spreadsheet, in the Knowledge Center, on the [Conversion Catalog](#) page
- Agency-Specific Supplemental Conversion Information – Attached to the top row of your <Agency> *Field Mapping – Other Cost Accumulator* worksheet in Smartsheet