

Task Instructions

Subtasks ID: 658-C

Task Name: *Submit Data Field Mapping (Grant ID)*

Task Start Date: *January 6, 2025*

Task Due Date: *February 14, 2025*

Project Impact: *Direct*

Task Description

Complete and submit data field mapping to support conversion activities.

658-C: Complete and submit mapping of FLAIR Grant ID codes to Florida PALM values to support conversion activities.

NOTE: *The following agencies do not have Grant ID Mapping: DOAH, DOL, FCOR, FGCC, LEG and are not required to complete this task.*

Task Overview

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
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

Active grants in FLAIR will be converted to Florida PALM using the Grants Conversion (GMC001). When active grants are converted to Florida PALM, the Grant ID used in FLAIR will be the same Grant ID used in Florida PALM, providing a one-to-one mapping.

In preparation for the Ledger Conversion (GLC001), the Project has identified FLAIR Grant IDs on agency Master Balance files, as of November 30, 2024, that cannot be mapped to a Florida PALM Grant ID. The unmapped values are identified as either:

- **Inactive** – indicating the grant is not active in FLAIR, therefore not applicable for the Grants Conversion (GMC001), or
- **Not Found** – indicating the grant is not active in FLAIR and is not found in the FLAIR Title File.

A new worksheet, <Agency> *Field Mapping – Grant ID*, has been added to the Conversion Inventory folder of your Agency Workspace in Smartsheet. All FLAIR Grant IDs that have been found on your Master Balance File have been identified as **inactive** or **not found** have been provided in the worksheet.

Review your worksheet to determine if a mapping to a Florida PALM value should be provided to support the conversion of your GL balances. If a mapping is needed (i.e., you would like your general ledger balances converted with a Grant ID), you may choose to map the identified FLAIR Grant IDs to one of the following values:

- Florida PALM OA1
- Florida PALM OA2
- Florida PALM Contract ID
- Florida PALM Project ID
- Florida PALM Grant ID

If you choose to provide Grant ID mapping, each FLAIR Grant ID provided in the worksheet must be mapped to a valid Florida PALM value (select Provide Mapping in the Mapping Action column) or marked as 'not valid' (select Remove – FLAIR Grant ID Not Valid in the Mapping Action column).

A supplemental Excel document is attached to the top row of your <Agency> *Field Mapping – Grant ID* worksheet. This supplemental document provides a listing of the Master Balance records, pulled from FLAIR on November 30, 2024, that include FLAIR Grant IDs listed in your worksheet as 'Inactive' or 'Not Found'. Use this supplemental document to support your completion of the mapping of the Grant IDs.

Forms Connections Dynamic View									
DEMO Conversion Mapping - Grant ID ☆									
Is Grant ID Mapping Needed for GL Conversion?	FLAIR Grant ID	Grant ID Status - Not Found or Inactive	Mapping Action	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
<div> <input type="radio"/> Yes - Mapping is needed <input type="radio"/> No - Mapping is not needed </div>									

Figure 1: Conversion Mapping – Grant ID

The <Agency> Field Mapping – Grant ID worksheet contains the following columns:

- Is Grant ID Mapping Needed for GL Conversion? (Required)
 - Select the appropriate option from the drop-down.
 - Yes – Mapping is Needed: Select this option if your agency requires GL Balances to be converted with the associated Grant ID.
 - If this option is selected, you must complete the worksheet providing a “Mapping Action” for each FLAIR Grant ID listed.
 - No – Mapping is Not Needed: Select this option if your agency does not want GL Balances to be converted with the detail provided by Grant ID.
 - This option will indicate to the Project that your agency does not want any Grant IDs to be included for the GLC001 conversion, even values that could be mapped from FLAIR to Florida PALM.
 - If this option is selected, **no further action is required in the worksheet.**
- FLAIR Grant ID (Locked from editing)
 - This column is prepopulated to include FLAIR Grant IDs for your agency that are included in GL Balances that are unable to be mapped.
 - This list should mirror the values in the supplemental Excel file.
- Grant ID Status – Not Found or Inactive (Locked from editing)
 - This column is prepopulated to indicate why FLAIR Grant ID appears in the list.
 - ‘Inactive’ indicates that the grant is not active in FLAIR, therefore not applicable for the Grants Conversion (GMC001).
 - ‘Not Found’ indicates the grant is not active in FLAIR and was not found in the FLAIR Title File.
- Mapping Action (Required for all rows of data if “Yes – Mapping is needed” is selected in the first column)
 - Select the appropriate option from the drop-down.
 - Provide Mapping: Select this option to provide a mapping of the FLAIR Grant ID to a Florida PALM value.
 - Remove – FLAIR Grant ID Not Valid: Select this option if the FLAIR Grant ID is no longer valid or active, therefore a mapping is not needed.
- Map to Florida PALM Data Type (Required if “Provide Mapping” is selected for the Mapping Action)
 - Select the appropriate drop-down option to identify the data type the FLAIR Grant ID 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 “Provide Mapping” is selected in the Mapping Action 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 Grant ID code.
- Update Mapping to Florida PALM OA2 (Required if “Provide Mapping” is selected in the Mapping Action 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 Grant ID code.
- Update Mapping to Florida PALM Contract ID (Required if “Provide Mapping” is selected in the Mapping Action 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 Florida PALM Contract ID that should be mapped to the provided FLAIR Grant ID code.
- Update Mapping to Florida PALM Grant ID (Required if “Provide Mapping” is selected in the Mapping Action 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 Florida PALM Grant ID that should be mapped to the provided FLAIR Grant ID code.
- Update Mapping to Florida PALM Project ID (Required if “Provide Mapping” is selected in the Mapping Action 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 confirmed for conversion in previous RW Task 555-A.
 - Select the correct Florida PALM Project ID that should be mapped to the provided FLAIR Grant ID code.
- Comments (Optional for agency use)

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

- You may choose to not include a Grant ID on any of agency’s converted GL balances. If so, select “No – Mapping is not needed” in the first cell of the worksheet.
- The data fields a FLAIR Grant ID can be mapped to are optional fields in the related Florida PALM conversions for GL balances. If a FLAIR Grant ID mapping is not provided, the conversions will load successfully and will not include a Grant ID in Florida PALM.
- If you choose to provide a mapping for a FLAIR Grant ID that is deemed “Inactive” or “Not Found”, it can only be mapped to one and only one Florida PALM value.
- A single Florida PALM value can be mapped to multiple FLAIR Grant IDs.
- The FLAIR Grant IDs included were pulled from FLAIR as of November 30, 2024, and only include those Grant IDs found on active FLAIR GL balances but not found in the Florida PALM Grants Conversion or the FLAIR Title File.

How will agencies use this information?

Agencies will use the FLAIR Grant ID mapping 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 Grant ID to the new Florida PALM value.

What will the Florida PALM Team do with this information?

The FLAIR Grant ID to Florida PALM value mapping has a direct impact to the GLC001 – Ledger conversion, as it allows mapping from the FLAIR Grant ID.

The Florida PALM team will update the FLAIR Grant ID 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>Is Grant ID Mapping Needed for GL Conversion?</i> column has a selection for the first row only.
If “Yes – Mapping is needed” is selected in the <i>Is Grant ID Mapping Needed for GL Conversion?</i> column, then a selection is provided in the <i>Mapping Action</i> column for all rows of data.
If “Provide Mapping” is selected in the <i>Mapping Action</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 “OA1” is selected in the <i>Map to Florida PALM Data Type</i> column, a valid OA1 value is selected in the <i>Update Mapping to Florida PALM OA1</i> column.

Task Instructions

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Conversion Inventory > Agency Conversion Mapping – Grant ID

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100 percent 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 – Grant ID.
2) 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.
3) Complete task by February 14, 2025 .
4) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.

Summary of Task Completion Steps

5) *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 – Grant ID worksheet in Smartsheet