

Overview

Agencies provided a mapping of FLAIR Organization values to Florida PALM Organization IDs in previous RW Task 658-A. Those mappings were used in Mock Conversion 2. This task (RW Task 659) requires agencies to review the Organization mapping that was previously provided and make any updates, as necessary, to be used in Mock Conversion 3.

Worksheet Details

Your *<Agency> Field Mapping – Organization* worksheet is pre-populated with FLAIR Organization Codes that were found in the following active record types in FLAIR as of March 1, 2025:

- GL Balances
- Assets
- Encumbrances (with balances)
- Open Accounts Receivables

Review your worksheet to determine if the Organization mapping is correct, if an update is needed, or if the FLAIR Organization value is no longer valid. If an update is needed, you may choose to map the identified FLAIR Organization value to any valid Florida PALM Organization ID you provided in the previous configuration task (RW Task 567-B), or updated values provided as part of the current configuration task (RW Task 657), as displayed in Figure 1. Updates made as part of RW Task 657 will be available through nightly processing throughout the duration of this task (Task 659).

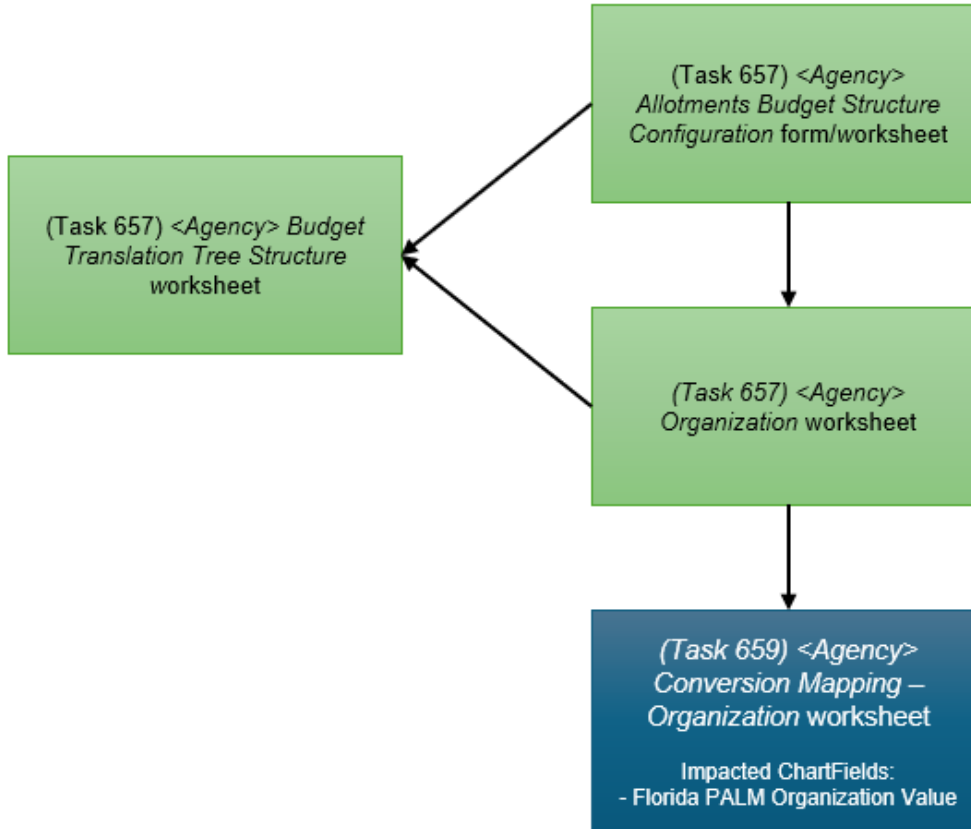


Figure 1: Cross-worksheet Connections for Org Mapping

An Excel document is attached to the top row of your <Agency> *Field Mapping – Organization* worksheet. The Excel document provides a listing of the active records that were pulled from FLAIR as of March 1, 2025, that included the FLAIR Organization Codes listed in your worksheet. Use the Excel document to support your understanding of how the FLAIR values are being used for Florida PALM conversion items.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Conversion Inventory > Agency Conversion Mapping - Organization

Field Details

The <Agency> *Field Mapping – Organization* worksheet contains the following columns:

- **Error Messages** (Locked from editing)
 - This column populates Real-time “[RT]” and/or interfaced “[API]” messages generated by Florida PALM using Agency provided data. Once the error gets corrected, the Error Message will disappear.
 - This column includes a message for checks related to the following:
 - any errors related to your agency’s Organization configuration found in the <Agency> *Organization* configuration worksheet.

- **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 Organization Code' and 'Mapped Florida PALM Organization ID' is correct and no changes are needed.
 - Remove – FLAIR Organization Code Not Valid: Select this option if the FLAIR Organization code is no longer valid or active (i.e., is no longer being used in FLAIR for any purpose, including payroll), therefore a mapping is not needed.
 - If you select this option, you must update any related records (see the Excel document) containing the Organization Code in FLAIR so that the record will include a valid Organization 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 Organization ID, or
 - There is no mapping provided, therefore, you must provide a mapping to one of the values in the Update Mapping to Florida PALM Organization ID column.

The screenshot shows a web-based spreadsheet interface titled "DEMO Conversion Mapping - Organization". The interface includes a top toolbar with various icons for grid view, filter, font settings, and editing. Below the toolbar is a table with the following columns: Error Messages, Value Mapping Confirmation, FLAIR Organization Code, Mapped Florida PALM Organization ID, Update Mapping to Florida PALM Organization ID, and Comments. The "Value Mapping Confirmation" column has a dropdown menu open, showing three options: "Yes - Mapping is Correct", "Remove - FLAIR Organization Code Not Valid", and "Update Mapping".

Figure 1: Conversion Mapping – Organization Worksheet

- **FLAIR Organization Code** (Locked from editing)
 - This column is prepopulated to include FLAIR Organization Codes for your agency as of March 1, 2025, that are included in the following active record types:
 - GL Balances
 - Assets
 - Encumbrances (with balances)
 - Open Accounts Receivables
- **Mapped Florida PALM Organization ID** (Locked from editing)
 - This column contains the mapping to the Florida PALM Organization ID, if you previously provided a mapping for the FLAIR Organization codes with the last mapping task (RW Task 658-A) or your agency's default Florida PALM Organization ID if a mapping was not previously provided.

- **Update Mapping to Florida PALM Organization ID** (Required if “Update Mapping” is selected in the Value Mapping Confirmation column)
 - This column contains a prepopulated drop-down list that includes all Florida PALM Organization IDs confirmed in RW Task 567-B and updated Organization IDs provided as part of the current configuration task (RW Task 657).
 - Updates made as part of RW Task 657 will be available through nightly processing throughout the duration of this task (Task 659).
 - Select the correct Florida PALM Organization ID that should be mapped to the provided FLAIR Organization Code.
- **Comments** (Optional for agency use)

NOTE: All FLAIR Organization Codes provided in the worksheet must be mapped to a valid Florida PALM Organization ID or marked as not valid. If marked as not valid you must stop use of the FLAIR Organization Code in FLAIR.

Helpful Considerations

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

- All FLAIR Organization Codes provided in this worksheet must be mapped to one and only one Florida PALM Organization ID, if not identified as ‘Remove – FLAIR Organization Code Not Valid’.
 - You will need to take action in FLAIR on any items marked ‘Remove – FLAIR Organization Code Not Valid’ or the value will appear in future conversions.
 - **Any conversion record with an unmapped FLAIR Organization Code will be loaded using a default agency Florida PALM Organization ID**, which may require mitigative action by the agency after go-live to update the records.
- A single Florida PALM Organization ID can be mapped to multiple FLAIR Organization Codes.
- The FLAIR Organization Codes were pulled from FLAIR as of March 1, 2025. The provided FLAIR Organization Codes are not representative of all active codes. The provided list only includes FLAIR Organization Codes that are found in active records subject to conversion (Assets, Encumbrances, Accounts Receivables, and General Ledger Balances).