Understanding your Dashboard

A Status Report Dashboard (example shown below in *Figures 1 and 2*) has been created within your agency's Florida PALM Workbook in Smartsheet. The format of the Dashboard allows for a simplified view of readiness data and easy submission of the Bimonthly Agency Readiness Status Report.
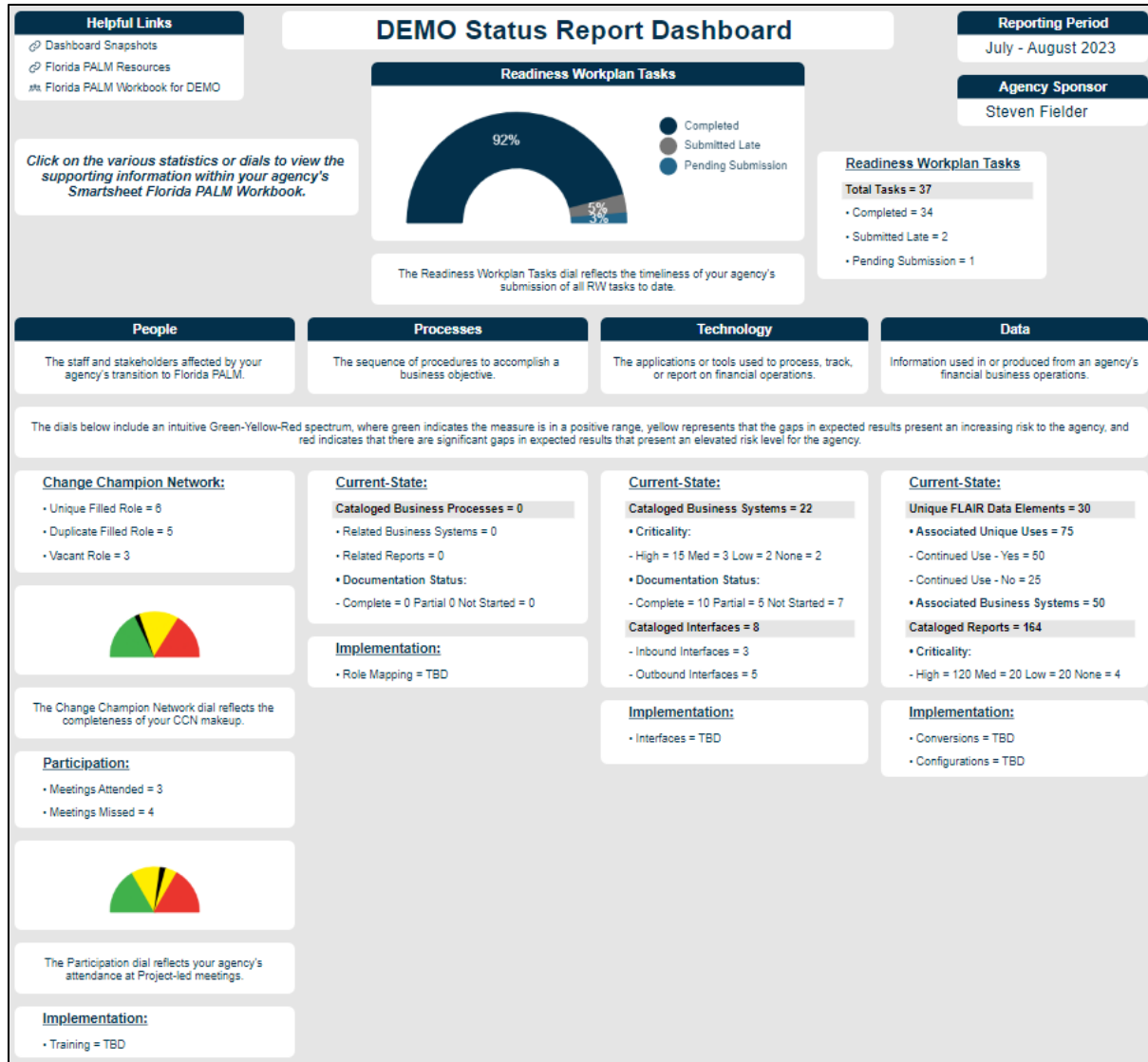

Figure 1: <Agency Acronym> Status Report Dashboard, Readiness Workplan Section

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DEMO Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Grant Tracking System remediation will not be completed in time to perform testing with Florida PALM	Open	9 (High/High)	A contract amendment is being developed to update requirements (scope) to the current agreement with the vendor.		07/14/23	John Smith, Chief of Finance and Budget
Technology	Poor vendor response to RFQ	Open	1 (Low/Low)	An extended response time will be included. A pre-response conference will be held prior to the response due date.		08/10/23	John Smith, Chief of Finance and Budget

DEMO Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Key Agency F&A Resource Resigned	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for a replacement. In the meantime, the agency is hiring the employee back with a temporary OPS position.		09/15/23	John Smith, Chief of Finance and Budget

DEMO Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/03/23	All agency business systems	

DEMO Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Technology	Conducted a monthly meeting with agency business system owners to discuss current-state and remediation needs	07/11/23	All agency business systems	Ensure regular updates and information is shared between the core support team and the technical system owners	A new risk related to the Grant Tracking System was identified during this month's meeting (See Agency Risks worksheet).
People	Florida PALM Sandbox Lunch and Learn	07/12/23	Accounts Payable Team General Services Team	To provide future Florida PALM end users a view of what Florida PALM looks like and how to navigate	A current Florida PALM end user provided a demonstration of a transaction in the current Florida PALM Sandbox
People	Florida PALM Sandbox Lunch and Learn	07/25/23	Accounts Payable Team General Services Team	To provide future Florida PALM end users a view of what Florida PALM looks like and how to navigate	A current Florida PALM end user provided a demonstration of a transaction in the current Florida PALM Sandbox
Data	Continued analysis for data clean-up of Org Codes and Project IDs	08/01/23	Grant Tracking System All agency users	To review the extent of the use of Org Codes and Project IDs	Current action item on track to be complete by 12/31/23. Next step will be to prioritize the clean-up activities.
Technology	Conducted a monthly meeting with agency business system owners to discuss current-state and remediation needs	08/10/23	All agency business systems	Ensure regular updates and information is shared between the core support team and the technical system owners	A new risk related to the Grant Tracking System was identified during this month's meeting (See Agency Risks worksheet).
Processes	Posted procurement to obtain consulting services	08/21/23	Bureau of Finance & Accounting as Contract Manager	Update business processes for Florida PALM	Vendor responses to RFQ to be received by 09/15/23. Evaluation and selection to conclude by 10/13/23.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ **Confirm** *

Submit

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DEMO Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:

Figure 2: <Agency Acronym> Status Report Dashboard, Agency Reported and Agency Sponsor Sections

The information contained within your agency's dashboard is real-time and fed through the following resources:

- Project maintained:
    - o Florida PALM Meetings Attendance Tracker
    - o Readiness Workplan Task Tracker
- Agency maintained and updated via RW tasks (through agency specific Florida PALM Workbook in Smartsheet):
    - o Change Champion Network
    - o Training (future task)
    - o Role Mapping (future task)
    - o Inventories:
        - ▪ FLAIR Data Elements
        - ▪ Current-State Business Systems
        - ▪ Current-State Business Processes
        - ▪ Current-State Interfaces
        - ▪ Current-State Reports
        - ▪ Configurations (future task)
        - ▪ Conversions (future task)
        - ▪ Interfaces (future task)
    - o Status Reporting:
        - ▪ Agency Risks
        - ▪ Agency Issues
        - ▪ Agency Assumption
        - ▪ Agency-Specific Readiness Activities

Clicking on the various statistics, dials, or reports within your dashboard will navigate you to one of the resources listed above so that you are able to view or make updates to the supporting information, as needed.

Navigation

The dashboard is located within the Agency Readiness folder (*Figure 3*) of your agency specific Florida PALM Workbook in Smartsheet. The Florida PALM Smartsheet webpage offers information about how Smartsheet is being used by agencies and the Project and includes a Smartsheet User Guide to assist agency users.
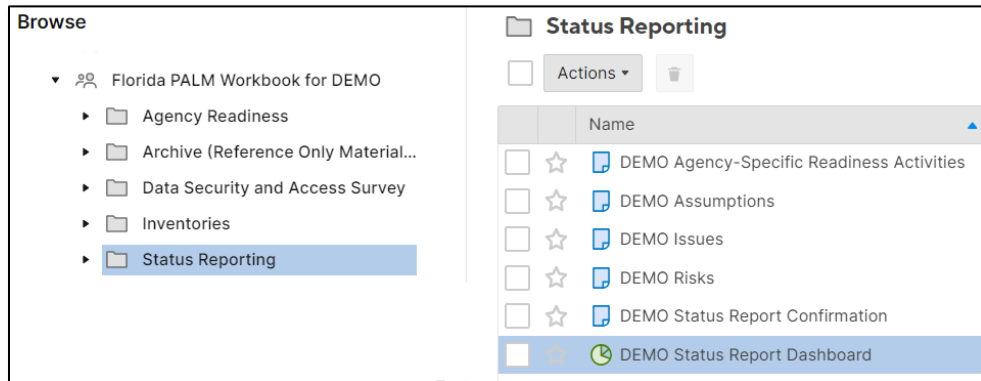
Figure 3: Florida PALM Workbook for <Agency Acronym> folder structure in Smartsheet

Helpful Links Section

The website links listed within the Helpful Links section of your dashboard (*Figure 4*) will navigate to:

- Dashboard Snapshots: Repository of snapshots for all previous reporting periods.
- Florida PALM Resources: The Catalogs of Interface and Conversion Offerings, the Reports Catalog, and the Data Dictionary, which are all maintained by Florida PALM.
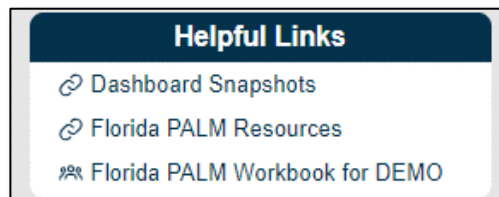- Florida PALM Workbook for <Agency Acronym>

Figure 4: Helpful Links section

Reporting Period Section

The Reporting Period section *(Figure 5)* indicates the two-month period that is being reported in your Bimonthly Agency Readiness Status Report. The Bimonthly Agency Readiness Status Report is due on the 10th day following the close of each bimonthly reporting period.
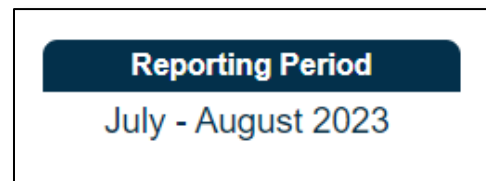
Figure 5: Reporting Period section

The dates displayed in this section of your dashboard will automatically update to the next reporting period 30 days after the close of the previous reporting period. For example, the text in the Reporting Period section of your dashboard will change from 'July – August 2023', to 'September – October 2023' on September 30, 2023. However, throughout the reporting period, you will be able to access the source worksheet (e.g., Agency Risks) in Smartsheet to make updates throughout your current reporting period.

Readiness Workplan Tasks Section

Readiness Workplan (RW) tasks are tasks that are assigned by the Project to every agency. Timely and accurate completion of RW tasks is critical for the overall success of Florida PALM implementation. This section of your dashboard *(Figure 6)* provides data and visual representation of:

- the number of Current State Analysis RW tasks that have started, as of December 2022,
- the number of those RW tasks your agency submitted on time,
- the number of those RW tasks your agency submitted late (after the due date), and
- the number of those RW tasks that are currently in progress.
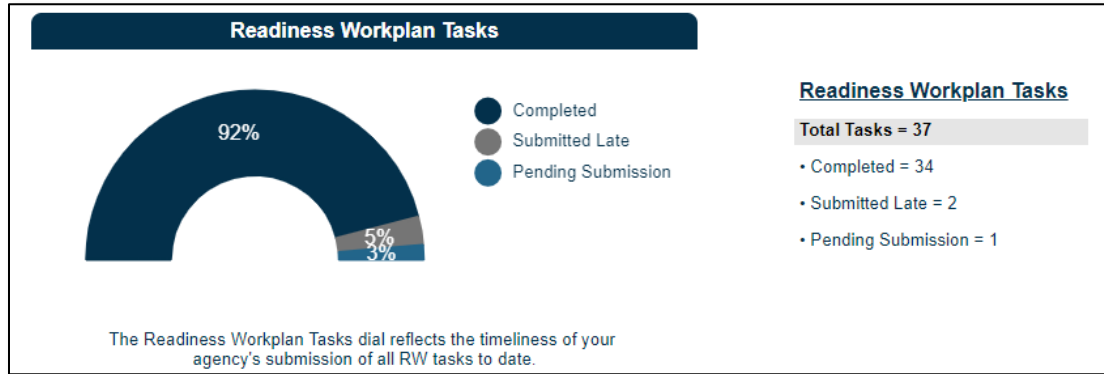
Figure 6: Readiness Workplan Tasks section

People Section

The "People" critical operational element is defined as the staff and stakeholders affected by your agency's transition to Florida PALM (e.g., leadership, technical and functional owners, subject matter experts, and end users). It focuses on staffing, skill gaps, knowledge, awareness and buy-in which is crucial to transformation of agency business operations. This section of your dashboard provides a high-level, summarized visual of your agency's current progress with people related readiness efforts.

The dials include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency. Each dial represents a maximum score that equals 100%.

- Green equals a score between 100% and 66.6667%
- Yellow equals a score between 66.6666% and 33.3334%
- Red equals a score between 33.3333% and 0%
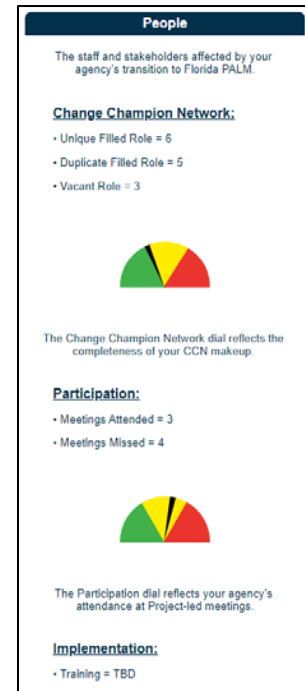
Figure 7: People section

The Change Champion Network (CCN) dial has a set maximum score of 14 (100%), as that is the total number of CCN Primary and Backup roles expected for each agency.

- Uniquely filled role assignments earn 1 point each
- Duplicate role assignments earn 0.5 points each
- Vacant role assignments earn 0 points

In the example (*Figure 7*), the total score is 8.5 or 60.7% which represents a yellow score for agency CCN assignments at that agency.

The Participation dial maximum is equal to the total number of Florida PALM meetings held within the current reporting period (i.e., Touchpoints, Town Halls, Tuesday Task Talks, Liaison Forums). Agencies earn 1 point per meeting, towards that total, if at least one agency representative attends

in person, attends remotely, or watches the meeting recording (if applicable) within two weeks of the meeting.

The Implementation header is a placeholder for metrics, measures, or results from future implementation-related readiness workplan tasks that will be assigned to your agency, for example, related to training.
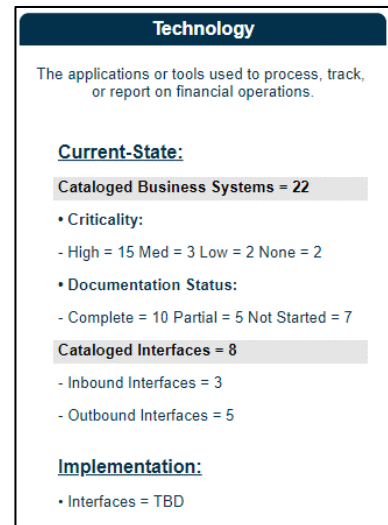
Processes Section

Processes

The sequence of procedures to accomplish a business objective.

spectrum, where green indicates the measure is in a posi...
...ed indicates that there are significant gaps in expected res...

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Figure 8: Processes section

The "Processes" critical operational element is focused on the sequence(s) of procedures to accomplish an agency's business objectives. Current statewide and agency-specific business processes are changing and require resources (both people and technology) to learn, adopt, and adapt to the future-state sequence. This section of your dashboard *(Figure 8)* is intended to provide information about your agency's efforts to understand and document current processes and to transform your business processes for the changes brought about by Florida PALM.

Note: The Implementation header is a placeholder for metrics, measures, or results of future implementation-related readiness workplan tasks that will be assigned to your agency, for example, related to role mapping.

Technology Section

The "Technology" critical operational element is focused on the applications or tools used to process, track, or report on financial operations. These are your agency business systems that use FLAIR data that may need to interface to Florida PALM or need to be remediated. This section of your dashboard *(Figure 9)* is intended to provide information about your agency's efforts to understand and document current business systems and technology tools and to remediate those systems for the changes brought about by Florida PALM.

The Implementation header is a placeholder for metrics, measures, or results from future implementation-related readiness workplan tasks that will be assigned to your agency, for example, related to interfaces.

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 22

• Criticality:

- High = 15 Med = 3 Low = 2 None = 2

• Documentation Status:

- Complete = 10 Partial = 5 Not Started = 7

Cataloged Interfaces = 8

- Inbound Interfaces = 3

- Outbound Interfaces = 5

Implementation:

• Interfaces = TBD

Figure 9: Technology section

Data Section

The "Data" critical operational element is focused on information used in or produced from an agency's financial business operations. An agency's data supports its people, processes, and technology and should be evaluated and monitored against those distinct purposes. This section of your dashboard *(Figure 10)* is intended to provide information about your agency's efforts to understand and document current data uses and needs and to prepare your data and reporting needs for the changes brought about by Florida PALM.

The Implementation header is a placeholder for metrics, measures, or results from future implementation-related readiness workplan tasks that will be assigned to your agency, for example, related to conversions and configurations.
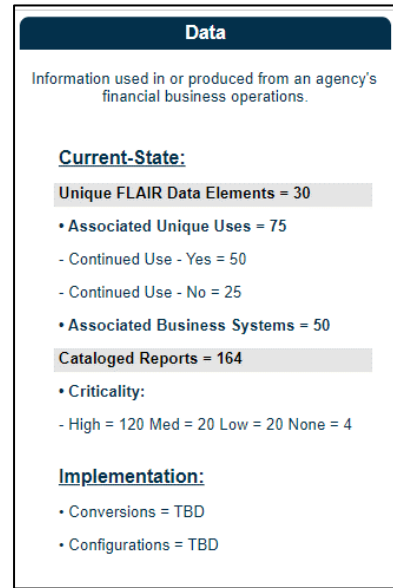
Figure 10: Data section

Agency Reported Section

The Agency Reported section *(Figure 11)* displays agency reported readiness risks, issues, assumptions and agency-specific activities. Agencies will maintain sheets within Smartsheet to provide status updates. Status report data relevant to the reporting period will be displayed on the dashboard:

- Agency Risks will display any open risks or any risks that were closed within the reporting period, sorted by highest risk rating.
- Agency Issues will display any open issues or any that were closed within the reporting period, sorted by highest priority.
- Agency Assumptions will display any logged assumptions or assumptions that were removed within the reporting period, sorted by status (logged then removed).
- Agency-Specific Activities will display any activities that occurred during the reporting period, sorted by date.

Figure 11: Agency Reported Section

Agency Sponsor Confirmation Section

The Agency Sponsor Confirmation *(Figure 12)* allows for easy submission of dashboard, as required for Bimonthly Status Reporting. Upon submission, a confirmation status will appear in the Status Report Confirmation section.

Figure 12: Agency Sponsor Confirmation Section