Asset Management Module Configurations

This workbook contains two worksheets that represent core configuration components in Florida PALM. Column/field definitions and instructions are provided below. This configuration workbook contains the following Asset Management module configurations to which agencies will review and update (as needed) the values that will be set up in Florida PALM:

- Location Definition
- Area ID Values

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Inventories > Configuration Workbook Inventory > Asset Management (AM)

Ongoing Data Maintenance

Agency worksheets are used to support the Project performed Dry Runs and will be loaded into Florida PALM for the final cutover at go-live as shown in the Testing Timeline. Therefore, agencies are required to maintain and submit conversion and configuration related workbooks throughout UAT and for go-live based on the RW tasks listed below.

- Task 697 – Maintain Configuration and Conversion Workbooks
- Task 699 – Maintain Configuration and Conversion Workbooks
- Task 701 – Submit Configuration and Conversion Workbooks
- Task 703 – Maintain Configuration and Conversion Workbooks
- Task 706 – Submit Configuration and Conversion Workbooks
- Task 709 – Submit Configuration and Conversion Workbooks
- Task 714 - Submit Configuration and Conversion Workbooks in Preparation for Go-Live

Location Definition

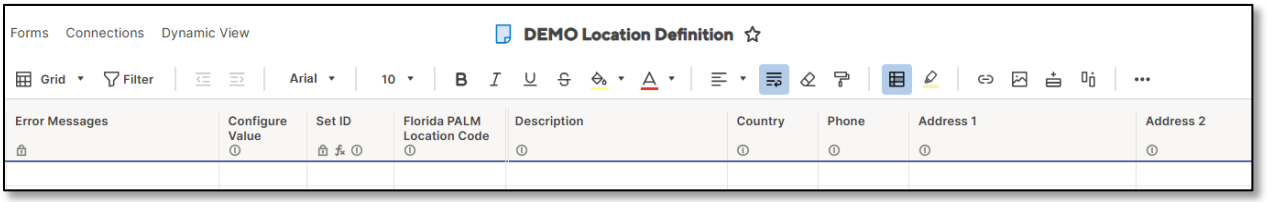

Figure 1: Location Definition Worksheet in Smartsheet (Panel 1)

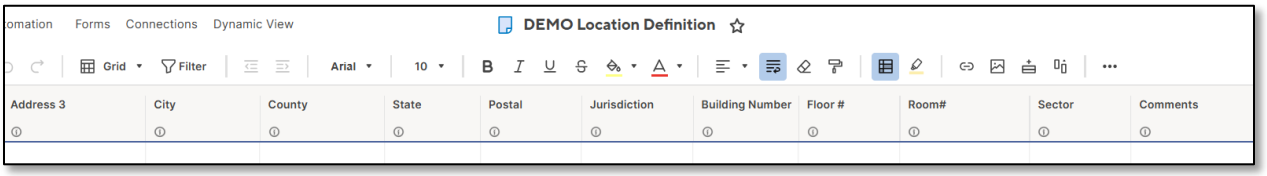

Figure 2: Location Definition Worksheet in Smartsheet (Panel 2)

Configuration Value Definition

'Location Definition' indicates an agency's physical location (e.g., address) for each Location Code.

Business Process and Subprocess

The Location Definition configuration supports the following business process and subprocess:

Table 1: Location Business Process and Subprocess

Business Process	Business Subprocess
40.3 Set up and Maintain Asset Controls	N/A

Configuration Value Purpose and Use

- All Florida PALM modules use Location Address information to process and record agency transactions.

The Location Definition configuration establishes valid Location Code ChartField values for agency use. These Location Code ChartField values are being utilized across agency worksheets (Figure 3) to ensure the most current information is available in associated ChartField drop-down selections as you complete your agency's configuration workbooks and conversion mapping worksheets.

Failure to complete the <Agency> Location Definition Configuration worksheet will result in Location Code ChartField values being unavailable for selection by your agency in the related worksheets.

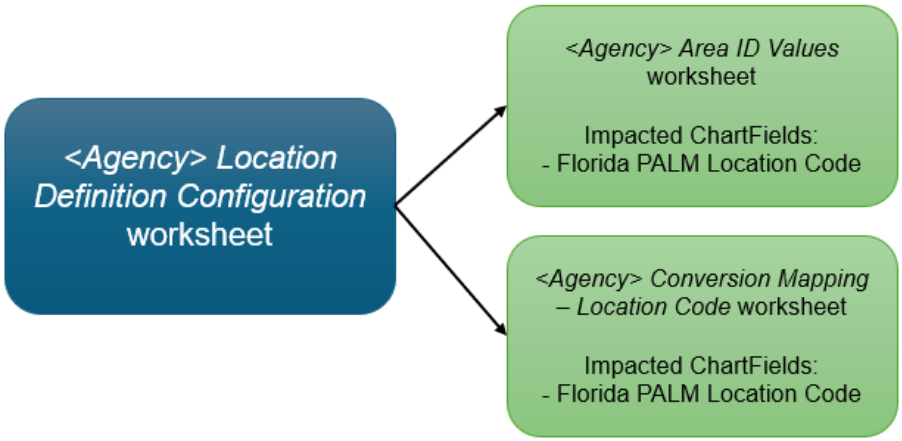

Figure 3: Cross-worksheet Connections for Location Definition

Configuration Design Details

The following design considerations are applied when defining Location Definition values in Florida PALM:

- Location Codes are required in Florida PALM and will be required to convert existing FLAIR property items.
- Location Codes are values that represent unique sites or locales that populate Location Address values in Florida PALM.
- Location Code values are ten (10) characters in length and are established based on the physical locations of each agency.
- Location Code values are agency-specific and available only for transactions by the associated agency; these values are not shared across all agencies.
- Location Address information is labeled optional in the workbook because some locations may not have a 911 address. If there is valid address information available, please complete each address field for each Florida PALM Location Code.
- Project Locations must be configured through the Asset Location configuration task, if different from Asset Locations. Project Location is not a required field.

The following assumptions are considered when defining a Location value:

- Agencies may enter additional addresses at the bottom of the Location Definition sheet, if an agency sees any missing locations.
- Values entered in the Florida PALM Location Code column must be agency unique.
- Attempts to create duplicate Florida PALM Location Codes will result in system error message.
- If the configured location addresses provided in the worksheet are incorrect, agencies will make corrections directly in those fields on the Location Definitions worksheet.
- Area IDs are optional configuration values that will be provided by agencies, if applicable, in a separate configuration workbook.

Florida PALM Location Code

The following information is intended to establish guidance in administering Location Codes in Florida PALM. Agencies will create a 10-character Florida PALM Location Code for each agency-occupied location address. There are two types of Location Codes in Florida PALM, which are included in the Location Definition worksheet:

- Agency Primary Location – used for administrative purposes only. Each agency will have one primary location.
- Agency Locations – used for recording daily operational transactions. Each agency will have multiple agency locations.

Agency Primary Location

The Agency's Primary Location is made up of the following:

- Agency Business Unit
- Agency Acronym

Example:

Agency: Agency for Health Care Administration
Location Code: **68000_AHCA**

(1st thru 5th Positions): **68000** = Agency Business Unit
(6th thru 10th Positions): **_AHCA**= Agency Acronym

Agency Locations

The Agency Location Code is made up of the following:

- 2-character County Number
- 8-character identifier determined by the agency

Using the Location Code in Florida PALM:

Example 1:

Agency: Department of Health
Location: Alachua Regional Service Center East
Location Code = **01REGIONAE**

(1st & 2nd Positions): **01** = Alachua County
(3rd thru 10th Positions): **REGIONAE** = Agency defined location identifier

Example 2:

Agency: Department of Agriculture and Consumer Services
Location: ANIMAL INDUSTRY EQUIPMENT POLE BARN 24x120
Location Code = **37EQUIBARN**

(1st & 2nd Positions): **37** = Leon County
(3rd thru 10th Positions): **EQUIBARN** = Agency defined location identifier

Configuration Field Details

Agencies must provide the following Location Definition related configuration values as listed in the *<Agency> Location Definition* worksheet in Smartsheet.

Table 2: Location Definition Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Error Messages	*Real-time "[RT]" and/or interfaced "[API]" messages which describe all errors found in the Agency*	N/A	N/A	N/A	Project Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
	Indicated, Agency Provided, or Agency Specified fields.				
Configure Value	Configure Value: "Yes" or "Remove"	Required	Character	6	Agency Indicated
Set ID	Value used in Florida PALM to define setup data. It allows the sharing of common setup data across Business Units or specific to Business Unit.	Required	Alpha-numeric	5	Project Provided
Florida PALM Location Code	Florida PALM agency provided unique specific location identifier. ***NOTE:*** *Florida PALM Location Code should be entered in all caps.* ***NOTE****: The use of special characters other than an underscore (_) is prohibited.*	Required	Character	10	Agency Provided
Description	Location Description.	Required	Character	30	Agency Provided
Country	Country Abbreviation. (Example: USA)	Required	Character	3	Agency Provided
Phone	Agency Phone Number Associated with Location (Example: 850/123-4567)	Optional	Character	24	Agency Provided
Address 1	Street Address of Asset Location OR Street Address OR P.O. Box of Agency Primary Location.	Optional	Character	55	Agency Provided
Address 2	Building Name at Location Address.	Optional	Character	55	Agency Provided
Address 3	Additional address details, if applicable.	Optional	Character	55	Agency Provided
City	City or Town of Location Address.	Optional	Character	30	Agency Provided
County	County of Location Address.	Optional	Character	30	Agency Provided
State	State of Location Address. (Example: FL)	Optional	Character	6	Agency Provided
Postal	Postal Code of Location Address.	Optional	Character	12	Agency Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
	(Example: 32301 or 32301-1234)				
Jurisdiction	User Defined Field.	Optional	Character	5	Agency Provided
Building Number	Building Number occupied by Agency at the Location Address, if applicable.	Optional	Character	10	Agency Provided
Floor #	Floor number within the location, if applicable. ***NOTE:*** *Florida PALM Floor Number should be entered in all caps. Once established in Florida PALM, this value cannot be edited/changed for the Florida PALM Location Code.*	Optional	Character	10	Agency Provided
Room #	Room number within the location, if applicable. ***NOTE:*** *Florida PALM Room Number should be entered in all caps. Once established in Florida PALM, this value cannot be edited/changed for the Florida PALM Location Code.*	Optional	Character	11	Agency Provided
Sector	Agency District/Area, if applicable.	Optional	Character	10	Agency Provided
Comments	Agency comments.	Optional	Character	254	Agency Provided

Configuration Page(s)

The following provides an example of the Location Definition configuration page.

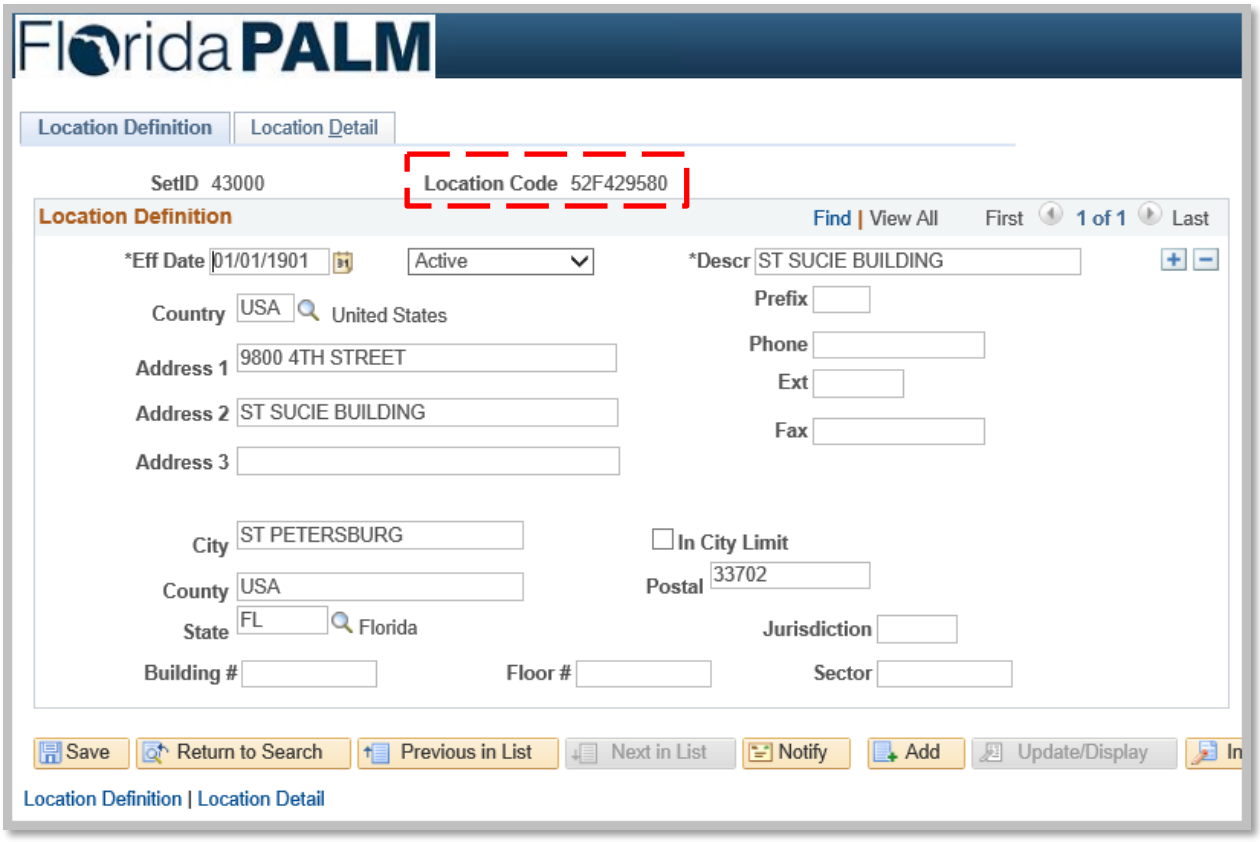

Figure 4: Location Definition Configuration Page Example

The following provides an example of the Location Definition as used by the Asset Module component in Florida PALM.

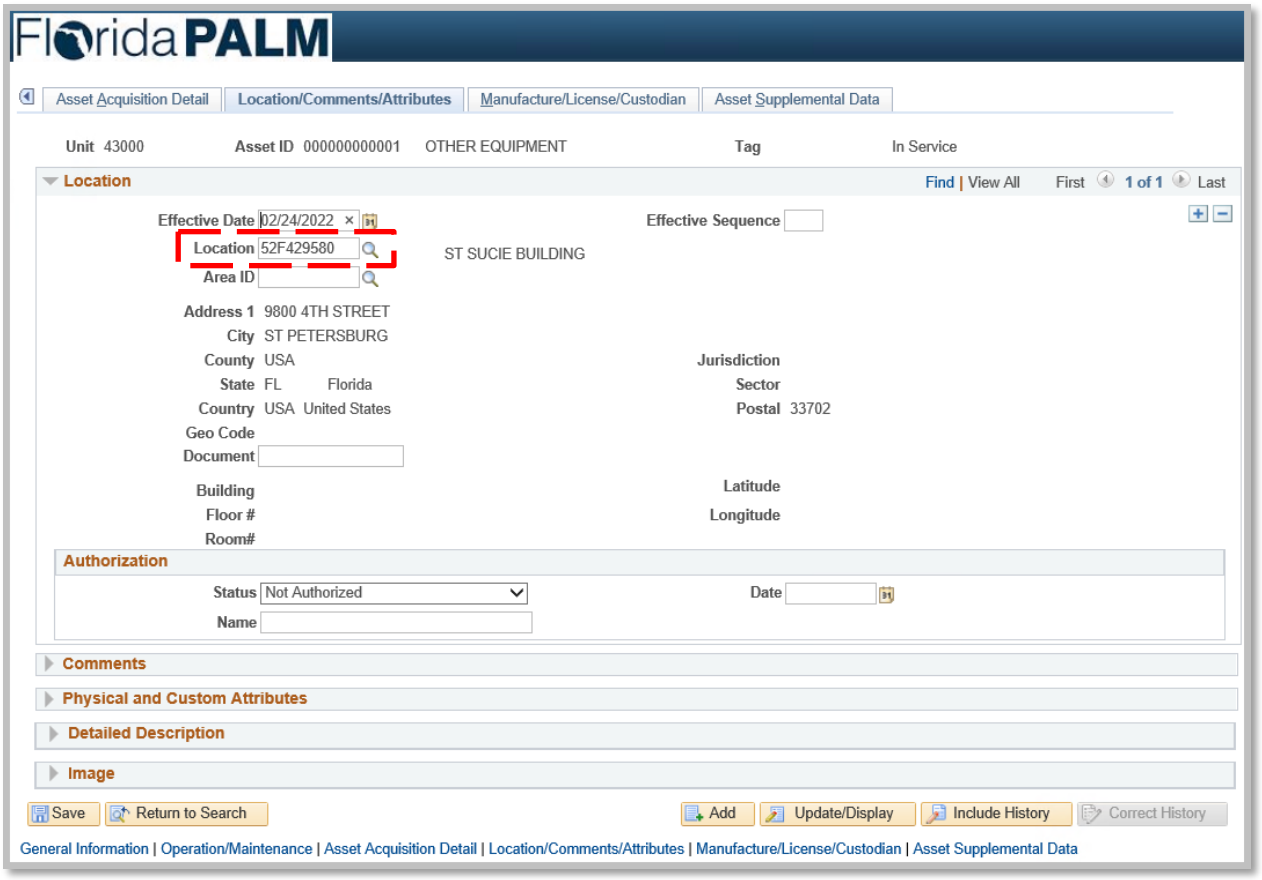

Figure 5: Use of Location Definition Configuration Value on an Asset Transaction Page

Worksheet Instructions

The below information provides detailed column instructions on how to complete the *<Agency> Location Definition* worksheet in Smartsheet. Continue to update Location Definition values for your agency as needed.

1. Review the worksheet and determine whether the configured values need updating in Florida PALM. A *Configure Value* column is provided to capture your agency's determination of the disposition of a configured Location Definition. Indicate "Yes" or "Remove" as appropriate.

2. In the *Configure Value* column:
    a. Select "Yes" if you need this location. Make any updates that are needed for this location.
    b. Select "Remove" if you no longer need this location. No other changes should be made to the row. The Location will be removed from the sheet via overnight process.

NOTE: *Rows removed via overnight processing cannot be retrieved. If removed rows need to be added back into the workbook, add the value's information onto a blank row and follow the guidance for establishing a new value*

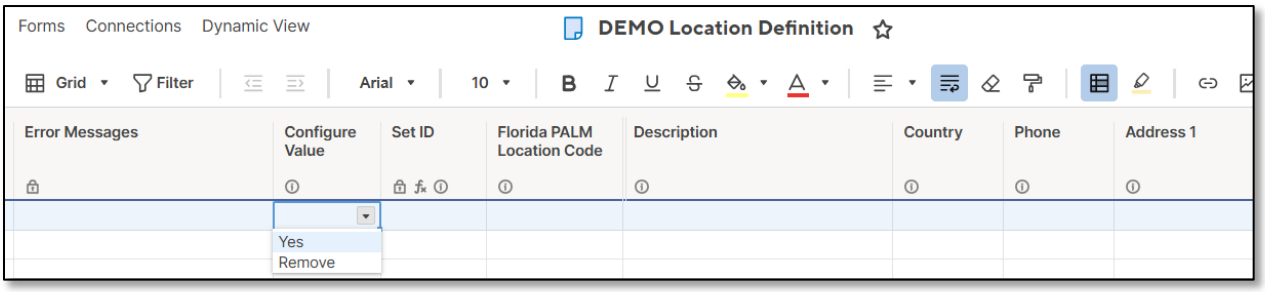

Figure 6: Location Definition Configure Value

3. Select "Yes" in a blank row to establish a new location. If selected, you must complete the following columns as required:
    a. Specify a 10-character value in the *Florida PALM Location Code* column, using the county code as the first two characters (See Table 6 in the appendix).
        i. Location Codes should be entered in all caps.
        ii. The use of special characters other than an underscore (_) is prohibited.
    b. Specify the following address details in the following columns:
        i. *Description* – Provide the location description (Facility Name*)* occupied by your agency, to be configured in Florida PALM.
        ii. *Country* – Provide the country abbreviation (Example: USA) of the location occupied by your agency, to be configured in Florida PALM.

4. If "Yes" is selected, you may choose to complete the following columns optionally; optional fields should be left blank unless applicable to your agency.
    a. Specify the following address details in the following columns (if applicable):
        i. *Phone* – Provide the agency phone number associated with the location occupied by your agency, to be configured in Florida PALM.
            - If provided, value entered cannot be '0' and should be in the format of ###/###-#### (Example: 850/123-4567).
        ii. *Address 1* – Provide the street address or P.O. Box associated with the location occupied by your agency, to be configured in Florida PALM.
        iii. *Address 2* – Provide the building name of the location occupied by your agency, to be configured in Florida PALM.
        iv. *Address 3* – Provide additional optional address details, if needed.
        v. *City* – Provide the city or town of the location occupied by your agency, to be configured in Florida PALM.
        vi. *County* – Provide the county of the location occupied by your agency, to be configured in Florida PALM.
        vii. *State* – Provide the state abbreviation (Example: FL) of the location occupied by your agency, to be configured in Florida PALM.
            - If provided, a value greater than 1 character, but no greater than 6 characters, must be entered.

viii. *Postal* – Provide the postal code of the location occupied by your agency, to be configured in Florida PALM.
   - If provided, the value entered should be in the format of XXXXX (Example: 32301) or XXXXX-XXXX (Example: 32301-1234).

ix. *Jurisdiction* – Provide the jurisdiction of the location occupied by your agency, to be configured in Florida PALM.

x. *Building Number* – Provide the building number of the location occupied by your agency, to be configured in Florida PALM.

xi. *Floor #* – Provide the floor number in buildings occupied by your agency, to be configured in Florida PALM.
   - Floor number values should be entered in all caps.
   - Additional floor information can also be added via the Area ID field as described in the Area ID section below.
   - Once established in Florida PALM, the Floor Number cannot be edited or changed on the Florida PALM Location Code.

xii. *Room #* – Provide the room number in buildings occupied by your agency, to be configured in Florida PALM.
   - Room number values should be entered in all caps.
   - Additional room information can also be added via the Area ID field as described in the Area ID section below.
   - Once established in Florida PALM, the Room Number cannot be edited or changed on the Florida PALM Location Code.

xiii. *Sector* – Provide the sector of the location occupied by your agency, to be configured in Florida PALM.

NOTE: *Optional fields should be left blank if not needed by your agency. Providing N/A in an optional field will result in an error when uploaded to Florida PALM.*

5. Review and correct any errors identified in the *Error Messages* column.

6. Use the Comments field, optionally, for your internal purposes.

NOTE: *Florida PALM requires each Location Code to be unique. Addition of a different description and/or address to an existing Location Code is considered a duplicate Location Code and will not be configured in Florida PALM.*

Area ID

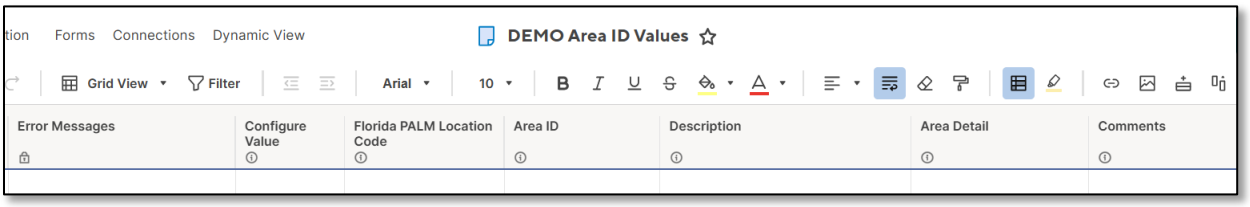

Figure 7: Area ID Values Worksheet in Smartsheet

Configuration Value Definition

An Area ID provides an opportunity to identify specific areas within an established location. This function can be used to identify multiple rooms or floors within a single location, or any other granular sub-division of the agency location. The system provides a 10-character (alphanumeric) field to populate an Area ID. Once the address and location code are created in Florida PALM, the floor, or floor and room number can be added to the Area ID field. Numerous lines can be added to reflect multiple floors or multiple floor/room combinations.

NOTE: *This is an optional feature that can be exercised by agencies and the values provided are for configuration in Florida PALM.*

Business Process and Subprocess

The Area ID configuration supports the following business process and subprocess:

Table 3: Area ID Business Process and Subprocess

Business Process	Business Subprocess
40.3 Set up and Maintain Asset Controls	N/A

Configuration Value Purpose and Use

- Area ID is an optional field. This field can be used to identify multiple rooms or floors within a single agency location.

Configuration Design Details

The following values must be provided by the agency when establishing an Area ID:

- Florida PALM Location Code: 10-character (alphanumeric, all caps) Florida PALM agency specific location identifier.
- Area ID: 10-character (alphanumeric, all caps) user defined field – value that will be displayed for the Area ID.
- Description: 30-character (alphanumeric) Area ID Description.
- Area Detail: 254-character detailed information field for the Area ID.

The following assumptions are considered when defining an Area ID:

- Florida PALM requires each Area ID to be unique per Location, meaning the Location Code can be used on multiple lines in the Area ID worksheet as long as it has a unique Area ID configured on each line.
- If an associated Location Code was removed from the Location Definition worksheet, the Location code needs to be replaced with a valid value wherever it was used in the Area ID Values worksheet.
- If an associated Location Code was updated on the Location Definition worksheet in a way that significantly changes its meaning, agencies should review all instances of the Location Code in the Area ID Values worksheet to determine if the selected value is still appropriate.

Example:
Agency: Department of Health
Location: Alachua Regional Service Center East
Location Code = **01REGIONAE**

Table 4: Area ID Example

Location Code	Area ID	Description	Area Detail
01REGIONAE	FL3RM12	Floor 3 Room 12	Office administrator storage area
01REGIONAE	FL3RM14	Floor 3 Room 14	
01REGIONAE	FLOOR2	Second Floor	
01REGIONAE	FL2RM16	Floor 2 Room 16	Director's office

Configuration Field Details

Agencies have the option to provide the following Area ID related configuration values as listed in the *<Agency> Area ID Values* worksheet in Smartsheet. Please note, the following information is only required if agencies choose to configure Area ID(s):

Table 5: Area ID Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Error Messages	*Real-time "[RT]" and/or interfaced "[API]" messages, which describe all errors found in the Agency Indicated, Agency Provided, or Agency Specified fields.*	N/A	N/A	N/A	Project Provided
Configure Value	Configuration Needed: "Yes" or "Remove" *Area ID is an optional agency configuration.*	Required	Character	6	Agency Indicated
Florida PALM Location Code	Florida PALM agency provided unique specific location identifier. ***NOTE:** Florida PALM Location Code should be entered in all caps.* *This must be a Location Code value already established in the <Agency> Location Definition worksheet.*	Required	Alpha-numeric	10	Agency Indicated

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Area ID	Florida PALM location specific area identifier. This is a user defined field that is associated to a specific Location Code. ***NOTE**: Area ID Values should be entered in all caps.*	Required	Alpha-numeric	10	Agency Provided
Description	Area ID Description.	Required	Character	30	Agency Provided
Area Detail	Detailed information field for the Area ID.	Optional	Character	254	Agency Provided
Comments	Agency comments.	Optional	Character	254	Agency Provided

Configuration Page(s)

The following provides an example of the Area Definition configuration page.

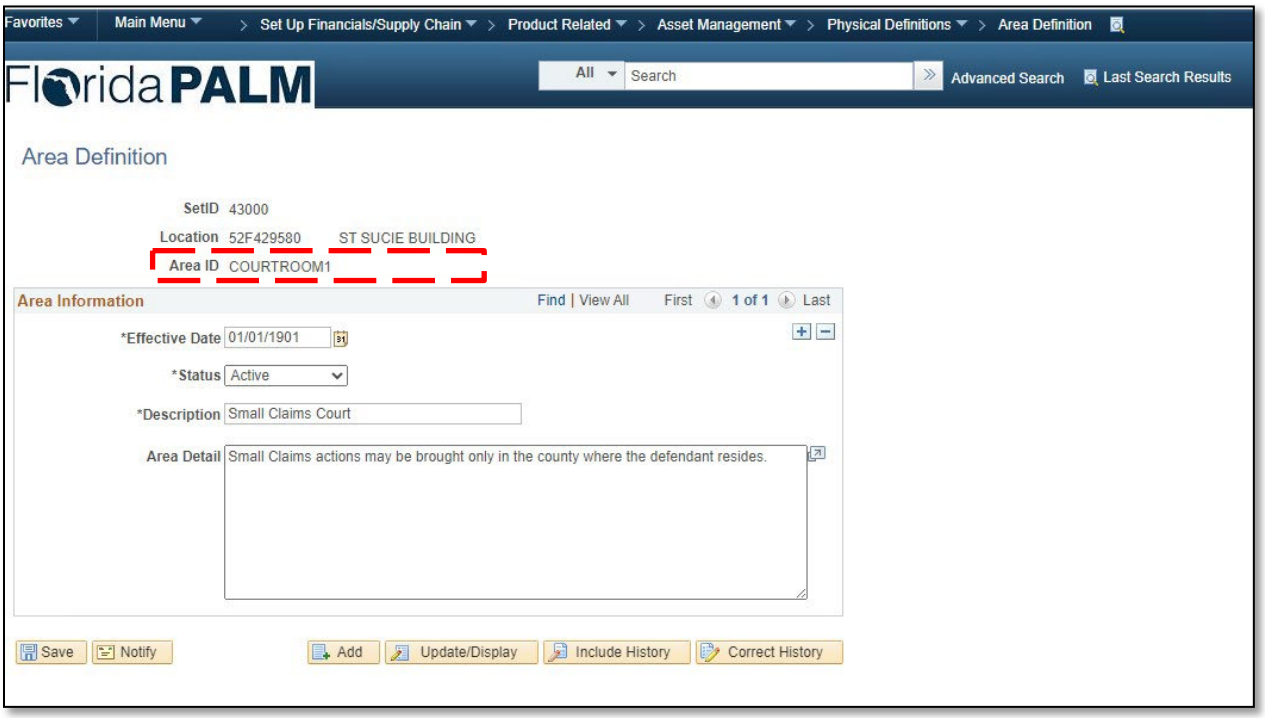

Figure 8: Area Definition Configuration Page Example

The following provides an example of the Area ID as used by the Asset Module component in Florida PALM.

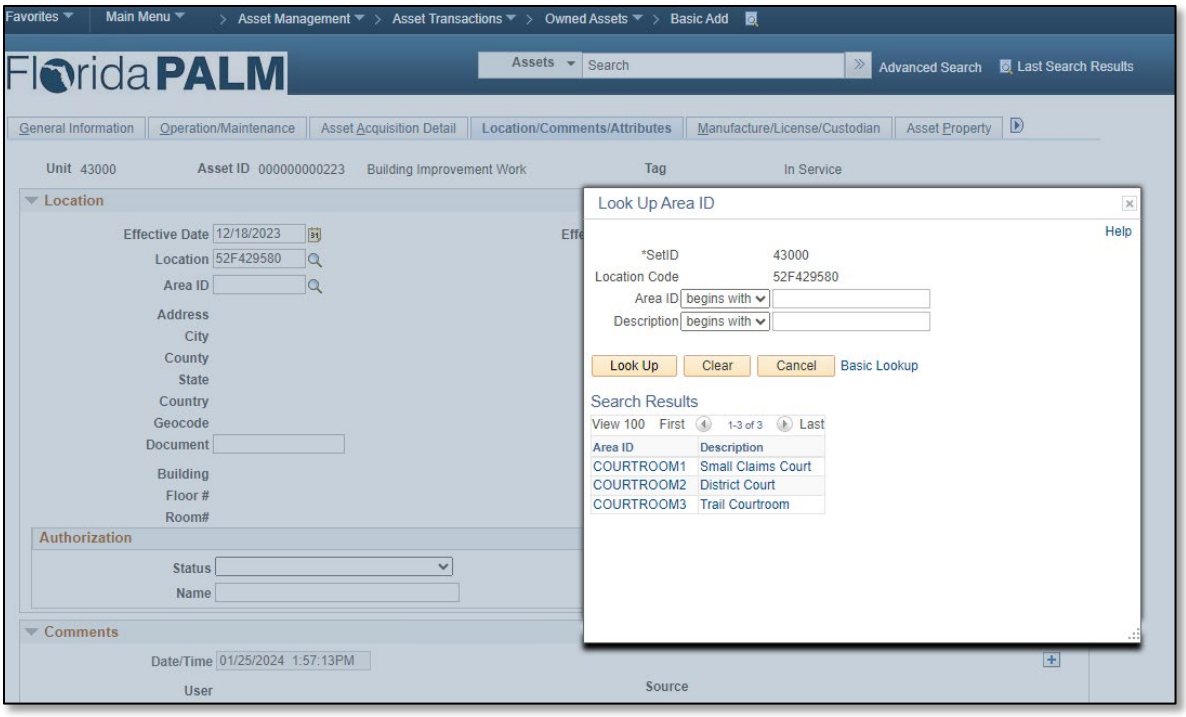

Figure 9: Use of Area Definition Configuration Value on an Asset Transaction Page

Worksheet Instructions

The below information provides detailed column instructions on how to complete the <*Agency*> *Area ID Values* worksheet in Smartsheet. Continue to update Area ID values for your agency as needed.

1. Review the worksheet and determine whether the configured values need updating in Florida PALM. A *Configure Value* column is provided to capture your agency's determination of the disposition of a configured Area ID value. Indicate "Yes" or "Remove", as appropriate.

2. In the *Configure Value* column:
    a. Select "Yes" if you still need this Area ID. Make any updates that are needed for this Area ID.
    b. Select "Remove" if you no longer need this Area ID. No other changes should be made to the row. The Area ID will be removed from the sheet via overnight process.

NOTE: *Rows removed via overnight processing cannot be retrieved. If removed rows need to be added back into the workbook, add the value's information onto a blank row and follow the guidance for establishing a new value*

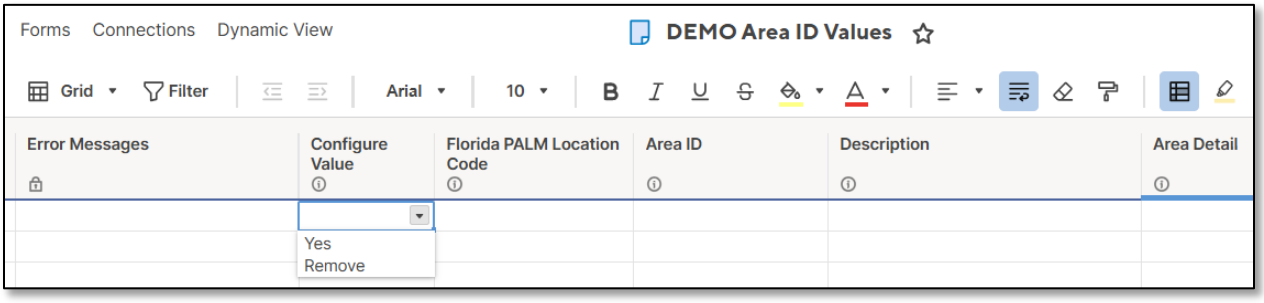

Figure 10: Area ID Configure Value

2. Select “Yes” in a blank row to establish a new location. If selected, you must complete the following columns as required:
    a. Provide the *Area ID* that you would like to create. This is a 10-character agency defined field which will be available for selection when setting the location of an asset. Area ID should be entered in all caps.
    Examples include:
        i. LUNCHROOM
        ii. OFFICE104
        iii. COURTROOM1
    b. Provide the *Description* of the Area ID and *Area Detail* information (e.g., rooms, floors), if applicable.
    Examples include:
        i. Employee lunchroom
        ii. Office #104
        iii. Small Claims Court

3. Optionally, you may also provide a more detailed description of the Area in the Area Detail column.

4. Review and correct any errors identified in the *Error Messages* column.

5. Use the *Comments* column, optionally, for your internal purposes.

Appendix

Table 6 provides a list of all Florida county codes.

Table 6: Florida County Codes

Code	County	Code	County
01	Alachua	35	Lake
02	Baker	36	Lee
03	Bay	37	Leon
04	Bradford	38	Levy
05	Brevard	39	Liberty
06	Broward	40	Madison
07	Calhoun	41	Manatee
08	Charlotte	42	Marion
09	Citrus	43	Martin
10	Clay	44	Monroe
11	Collier	45	Nassau
12	Columbia	46	Okaloosa
13	Miami-Dade	47	Okeechobee
14	Desoto	48	Orange
15	Dixie	49	Osceola
16	Duval	50	Palm Beach
17	Escambia	51	Pasco
18	Flagler	52	Pinellas
19	Franklin	53	Polk
20	Gadsden	54	Putnam
21	Gilchrist	55	St. Johns
22	Glades	56	St. Lucie
23	Gulf	57	Santa Rosa
24	Hamilton	58	Sarasota
25	Hardee	59	Seminole
26	Hendry	60	Sumter
27	Hernando	61	Suwanee
28	Highlands	62	Taylor
29	Hillsborough	63	Union
30	Holmes	64	Volusia
31	Indian River	65	Wakulla
32	Jackson	66	Walton
33	Jefferson	67	Washington
34	Lafayette		