

Understanding your Dashboard

An Agency Readiness Certification #3 Dashboard (Dashboard) has been created within your agency's Florida PALM Workbook in Smartsheet (example shown below in Figure 1). The Dashboard serves as the tool for the Agency Sponsor to submit the agency's readiness status for Readiness Certification #3.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Readiness Certification

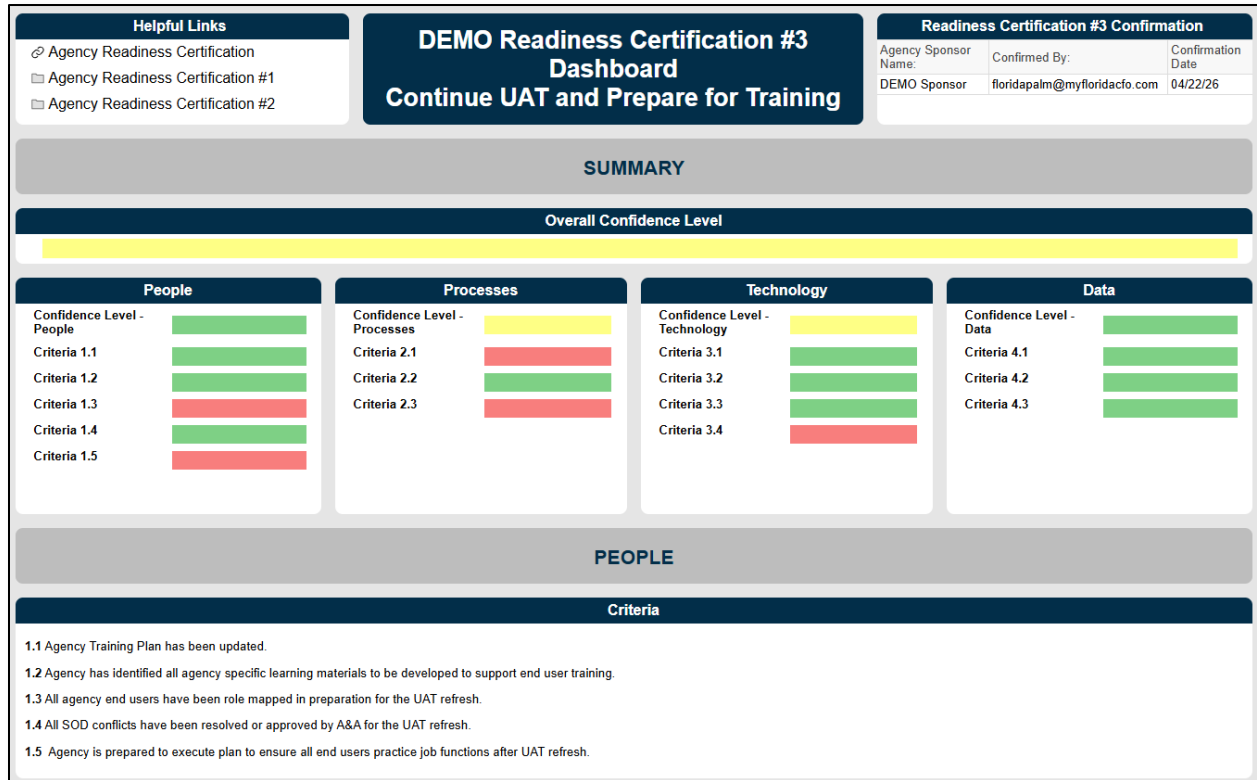


Figure 1: Demo Readiness Certification Dashboard

The Dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- <Agency> Readiness Certification #3
- <Agency> Readiness Mitigation #3
- <Agency> Readiness Workplan Task Tracker
- <Agency> Role Mapping Worksheet
- <Agency> Agency-Specific Training Inventory
- <Agency> Agency Business Process Documentation Inventory Worksheet
- <Agency> User Story Inventory Worksheet OR <Agency> Change Analysis Worksheet
- <Agency> Interface Cycle 3 – Full Integration Testing Worksheet

Critical Operational Elements

The Dashboard is organized to provide a view of agency readiness across the four critical operational elements:

- People – The staff and stakeholders affected by your agency’s transition to Florida PALM
- Processes – The sequence of procedures to accomplish a business objective
- Technology – The applications or tools used to process, track, or report on financial operations
- Data – Information used in or processed from an agency’s financial business operations

Helpful Links Section

The “Agency Readiness Certification” link in the Helpful Links section of your Dashboard (Figure 2) navigates to the Agency Readiness Reporting page of the Florida PALM website, where you can find additional information about Agency Readiness Certification and criteria. The “Agency Readiness Certification #1” and “Agency Readiness Certification #2” link navigates to the folder in your agency Smartsheet workspace that includes your worksheets and Dashboards from certifications previously submitted.

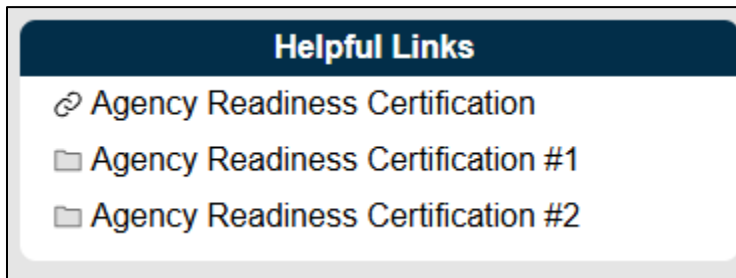


Figure 2: Helpful Links section

Readiness Certification Confirmation Section

The Readiness Certification Confirmation section (Figure 3) provides a view of the Sponsor Confirmation, including the date confirmed. The section will populate once the Agency Sponsor submits the certification confirmation.

Readiness Certification #3 Confirmation		
Agency Sponsor Name:	Confirmed By:	Confirmation Date
DEMO Sponsor	floridapalm@myfloridacfo.com	04/22/26

Figure 3: Readiness Certification Confirmation Section

Summary Section

The Summary section (Figure 4) contains five widgets. The first displays the Agency Sponsor’s overall confidence level regarding the agency’s readiness. The other four widgets display the Agency Sponsor’s confidence level and status of agency readiness criteria for each critical operational element. All data displayed in this section is derived from the <Agency> Readiness Certification worksheet.

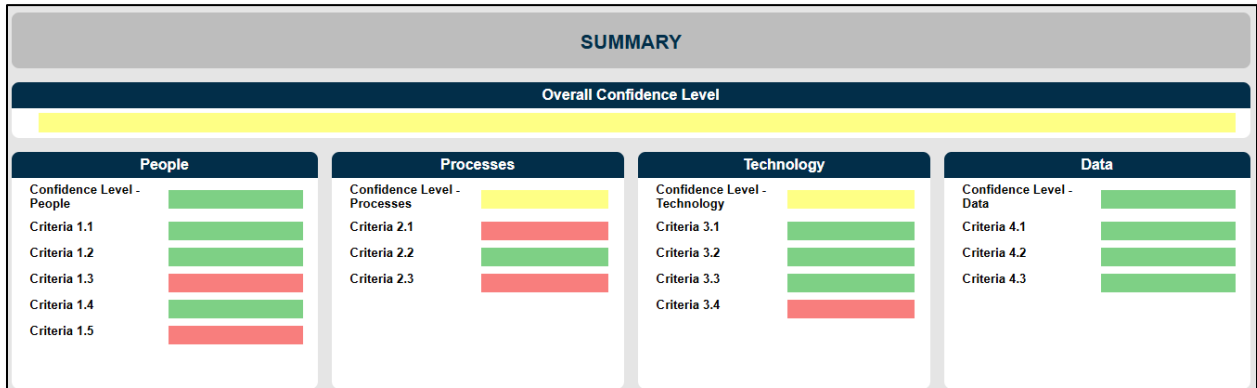


Figure 4: Summary Section

Summaries are conveyed using intuitive Green-Yellow-Red spectrum, where green indicates the agency has reported readiness in a positive range, yellow represents that the agency has identified gaps in expected results and presents a restrained confidence in agency readiness, and red indicates that there are significant gaps in expected results and the agency is apprehensive about their readiness. Each colored indicator is directly correlated to an agency’s reported status made on their <Agency> Readiness Certification Worksheet.

Confidence levels are translated to the following colors on the Dashboard:

- ‘Extremely Confident’ and ‘Very Confident’ selections are displayed as green
- ‘Moderately Confident’ and ‘Becoming Confident’ selections are displayed as yellow
- ‘Somewhat Concerned’ or ‘Highly Concerned’ selections are displayed as red

Responses of Met or Not Met, for each Readiness Certification Criteria, are displayed as the following colors:

- Criteria Met selection are displayed as green
- Criteria Not Met are displayed as red

Critical Operational Element Sections (People, Processes, Technology, Data)

Each of the critical operational elements has a designated section on the dashboard. The following widgets are found within designated sections on the dashboard.

Criteria

No agency action is needed in this section, as it’s provided for reference only. Found in all four sections.

The Criteria widget (Figure 5) provides the Readiness Certification Criteria required for that critical operational element.

Criteria
1.1 Agency Training Plan has been updated.
1.2 Agency has identified all agency specific learning materials to be developed to support end user training.
1.3 All agency end users have been role mapped in preparation for the UAT refresh.
1.4 All SOD conflicts have been resolved or approved by A&A for the UAT refresh.
1.5 Agency is prepared to execute plan to ensure all end users practice job functions after UAT refresh.

Figure 5: Criteria widget in People section

Related RW Tasks

No agency action is needed in this section, as it's provided for reference only. Found only in the People and Data sections.

The Related RW Tasks widget (Figure 6) provides a view of your agency's status of the RW tasks that are related to the Readiness Certification Criteria. Each task includes the agency reported task progress and the Project's provided verification status pulled from the <Agency> RW Task Tracker.

Related RW Tasks			
Task ID	Task Name	Agency Reported Task Progress	Project Verification of Completion
607	Update Training Plan	100% - Submitted	Submission Complete
702	Submit Role Mapping Worksheet	75% - Consolidating/Input Information for Submission	

Figure 6: Related RW Tasks widget in People section

Readiness Certification Worksheet

Agency action is required for this section via completion of the Readiness Certification worksheet. Found in all four sections.

The Readiness Certification Worksheet widget (Figure 7) provides the agency's and Project-provided responses to each readiness certification criteria for that critical operational element. The data is pulled directly from the <Agency> Readiness Certification worksheet.

Readiness Certification Worksheet					
Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
People	1.0	Overall People Readiness			
People	1.1	Agency Training Plan has been updated.	Yes		
People	1.2	Agency has identified all agency specific learning materials to be developed to support end user training.	No		
People	1.3	All agency end users have been role mapped in preparation for the UAT refresh.			
People	1.4	All SOD conflicts have been resolved or approved by A&A for the UAT refresh.			
People	1.5	Agency is prepared to execute plan to ensure all end users practice job functions after UAT refresh.			

Figure 7: Readiness Certification Worksheet widget in People section

Mitigation Plan

Conditionally, agency action is needed for this section depending on the responses in the Readiness Certification worksheet. Found in all four sections.

The Mitigation Plan widget (Figure 8) displays agency provided mitigation plans for each Readiness Certification Criteria not met. The data is pulled directly from the <Agency> Readiness Mitigation worksheet.

Mitigation Plan						
Criteria ID	Why has the criteria not been met?	What mitigating actions are being taken?	Who is responsible for supporting the mitigation?	Impact/workaround if mitigation is not completed?	Likelihood of Mitigation Plan Completion?	Planned completion date of the mitigation steps?
1.2						

Figure 8: Mitigation Plan widget in People section

Agency-Specific Training Inventory

No agency action is needed in this section, as it's provided for reference only. Found in the People section.

The Agency-Specific Training Inventory widget located in the People Section (Figure 9) displays the total number of applicable Topics for the agency, the number of topics dispositioned for agency-specific training creation, and the number of topics requiring agency-specific training materials. The data is pulled from your <Agency> Agency-Specific Training Inventory worksheet in Smartsheet.

Agency-Specific Training Inventory
Applicable Topics Based on User Stories =
- Number of Topics Dispositioned for Updates/Creation = /
- Number of Topics Requiring Training Materials = /

Figure 9: Agency-Specific Training Inventory

- *Applicable Topics Based on User Stories* indicates the number of applicable topics your agency has based on reported user stories.
- *Number of Topics Dispositioned for Updates/Creation* indicates the number of topics dispositioned for updates or creation out of the total applicable topics based on reported user stories.
- *Number of Topics Requiring Training Materials* indicates the number of topics that require training materials out of the total applicable topics based on user stories.

Role Mapping

No agency action is needed in this section, as it's provided for reference only. Found in the People section.

The Role Mapping widget located in the People Section (Figure 10) displays the total number of agency end users role mapped, total number of approved and unapproved SOD Conflicts, and a count of exceeded DW/BI licenses, if any. The data is pulled from your <Agency> *Role Mapping Worksheet* in Smartsheet.

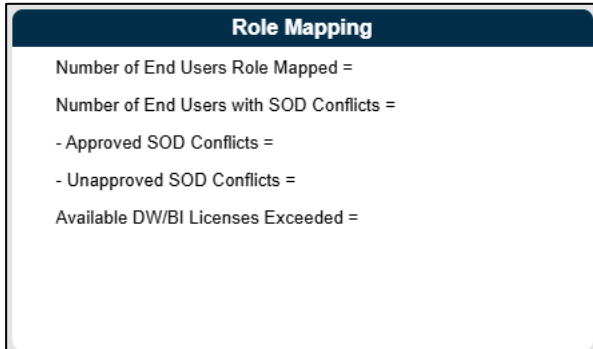


Figure 10: Role Mapping

- *Number of End Users Role Mapped* indicates the complete count of end users that your agency has listed.
- *Number of End Users with SOD Conflicts* indicates the complete count of end users that have SOD Conflicts, regardless of if they are approved or not.
- *Approved SOD Conflicts* indicates the complete count of approved SOD conflicts.
- *Unapproved SOD Conflicts* indicates the complete count of unapproved SOD conflicts.
- *Available DW/BI Licenses Exceeded* indicates the complete count of DW/BI Error Messages which show if your agency has exceeded their licenses.

User Story Testing Progress - Cumulative

No agency action is needed in this section, as it's provided for reference only. Found in the Processes section.

The User Story Testing Progress - Cumulative widget located in the Processes section (Figure 11) a summary of your agency's User Story Testing efforts since the start of UAT through June monthly progress reporting.

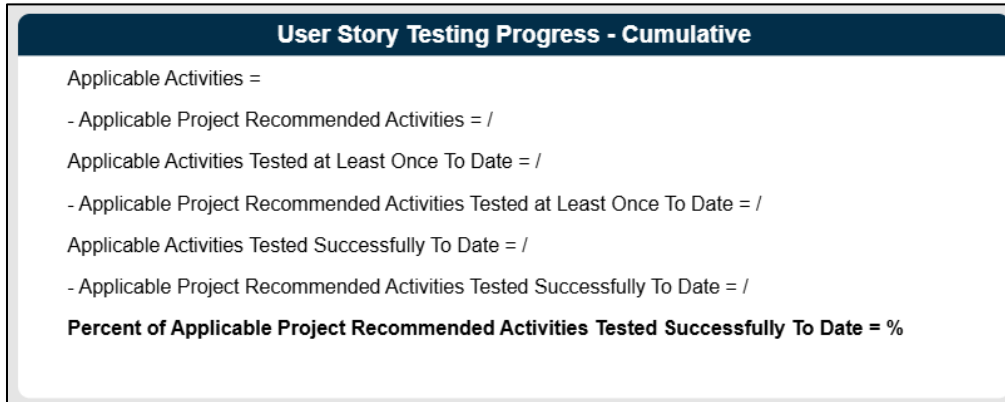


Figure 11: User Story Creation - Cumulative

- *Applicable Activities* indicates the total number of applicable activities (i.e., activity is not marked as not applicable) for your agency.
- *Applicable Project Recommended Activities* indicates the number of project recommended standard activities over the total number of applicable activities.
- *Applicable Activities Tested at Least Once To Date* indicates how many applicable activities have been tested at least once to date, based on current and previous progress reporting since the start of UAT.
- *Applicable Project Recommended Activities Tested at Least Once To Date* indicates how many applicable project recommended activities have been tested at least once to date, based on current and previous progress reporting since the start of UAT.
- *Applicable Activities Tested Successfully To Date* indicates how many applicable activities have been tested successfully (i.e., with at least one performance outcome of 'Satisfactory' or 'Above Expectations') to date, based on current and previous progress reporting since the start of UAT.
- *Applicable Project Recommended Activities Tested Successfully to Date* indicates how many applicable Project recommended activities have been tested successfully (i.e., with at least one performance outcome of 'Satisfactory' or 'Above Expectations') to date, based on current and previous progress reporting since the start of UAT.
- *Percent of Applicable Project Recommended Activities Tested Successfully To Date* displays the percent of applicable project recommended activities tested successfully to date, and assigns a color indicator. Refer to Table 1 for details.

This data is being pulled from either your <Agency> *Change Analysis* worksheets or <Agency> *User Story Inventory* worksheet, depending on your agency's User Story Inventory option selection, and based is based on selections made in your <Agency> *User Story Activity Coverage* worksheet. Only activities that are Project-defined, not agency defined, are included.

Table 1: Color Indicators for Percent of Applicable Project Recommended Activities Tested Successfully To Date

Percent of Applicable Project Recommended Activities Tests Successfully To Date	Color Indicator
100.00%	Green
90 – 99.99%	Yellow
0.00 – 89.99%	Red

Business Process Documentation Updates

No agency action is needed in this section, as it's provided for reference only. Found in the Processes section.

The Business Process Documentation Updates widget located in the Processes section (Figure 12) summarizes the total number of topics based on user stories, topics dispositioned for business process creation or updates, and the number of topics requiring training materials. This data is pulled from your <Agency> Agency Business Process Documentation Inventory worksheet.

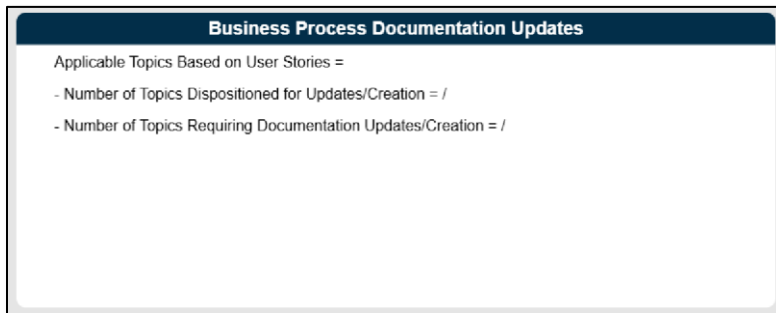


Figure 12: Business Process Documentation Updates

- *Applicable Topics Based on User Stories* indicates the number of applicable topics for your agency.
- *Number of Topics Dispositioned for Updates/Creation* indicates the number of topics dispositioned for documentation updates or creation out of the total applicable topics based on user stories.
- *Number of Topics Requiring Documentation Updates/Creation* indicates the number of topics that require business process documentation to be updated or created out of the total applicable topics based on user stories.

Cycle 3 Interfaces

No agency action is needed in this section, as it's provided for reference only. Found in the Technology section.

The Cycle 3 Interfaces Inbound/Outbound widgets located in the Technology section (Figure 13) is populated with information submitted in your previous Monthly Progress Reports since the start of UAT through June.

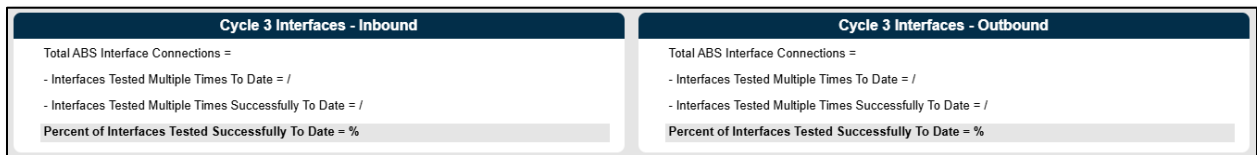


Figure 13: Cycle 3 Interfaces

- *Total ABS Interface Connections* indicates a total count of all unique Agency Business System interface connections (e.g., an ABS can have multiple connections).
- *Interfaces Tested Multiple Times* indicates the count of interfaces that have been tested more than once, as reported in your *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections.
- *Interfaces Tested Multiple Times Successfully* indicates the count of interfaces that have been successfully tested more than once (i.e., with at least two performance outcomes of 'Satisfactory' or 'Above Expectations') as reported in your *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections.
- *Percent of Interfaces Tested Successfully* indicates the percentage of interfaces that have been successfully tested more than once (i.e., with at least two performance outcomes of 'Satisfactory' or 'Above Expectations') as reported in *Interface Cycle 3 Full Integration Test* worksheet since the start of UAT, over the total number of unique Agency Business System interface connections and assigns a color indicator. Refer to Table 3 for details.

Table 2: Color Indicators for Percent of Interfaces Tested Successfully

Percent of Interfaces Tested Successfully	Color Indicator
100.00%	Green
90 – 99.99%	Yellow
0 – 89.99%	Red

Worksheet Errors

No agency action is needed in this section, as it's provided for reference only. Found in the Data section.

The Worksheet Errors widget located in the Data section (Figure 14) displays a total count of rows in error in your agency's:

- combined configuration workbooks, and
- combined conversion worksheets

You can view all errors in your <Agency> *Consolidated Error Message Report* and review the individual worksheet supplemental documents for guidance on how to resolve worksheet errors.

NOTE: *Worksheet error counts may not be reflective of all issues requiring updates in a workbook. There may be missing data or other errors captured by conditional formatting that may not be captured in the Error Message counts.*

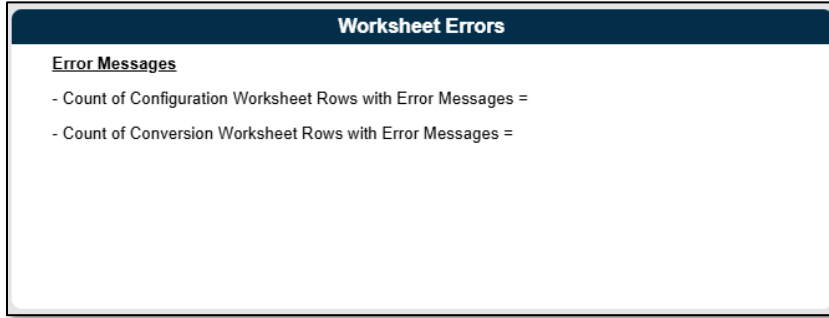


Figure 14: Worksheet Errors

Agency Sponsor Confirmation Section

Agency action is needed for this section via completion of the Agency Sponsor Confirmation.

The Agency Sponsor Confirmation (Figure 15) allows for easy submission of the Readiness Certification Dashboard. The confirmation should only be submitted by the Agency Sponsor after the <Agency> Readiness Certification and <Agency> Readiness Mitigation worksheets (if applicable) have been completed. Upon submission, a confirmation status will appear in the Status Report Confirmation section at the top of the page.

NOTE: The Submission Form will be enabled starting on July 1 to allow submissions and will close promptly the day after the task is due.

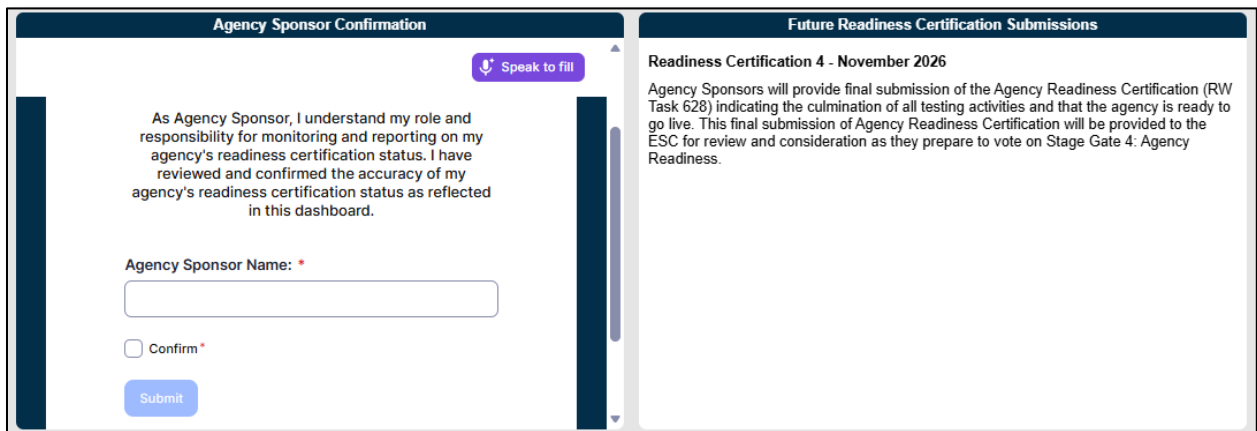


Figure 15: Agency Sponsor Confirmation and Future Certifications Section

Future Readiness Certification Submissions Section

No agency action is needed in this section, as it's provided for reference only.

The Future Readiness Certification Submissions section (Figure 15) gives an overview of the timing and purpose of the last readiness certification required before go-live.