# Dashboard Overview

A *<Agency> Monthly Progress Report* dashboard (example shown below in Figures 1 and 2) has been created within your agency's Florida PALM Workbook in Smartsheet. The Monthly Progress Report dashboard provides a high-level view of your agency's reported testing activity and UAT preparation progress and serves as the tool for your Agency Sponsor to confirm and submit your agency's progress each month.

The *<Agency> Monthly Progress Report* dashboard is designed to allow agencies to confirm progress of interface testing and UAT preparation activities. The dashboard has and is expected to continue to evolve over time to display relevant data and metrics related to activities including participation in UAT, full integration testing, training, and cutover.

***Smartsheet Navigation:***

*Florida PALM Workbook for (Agency) > Monthly Progress Reporting*

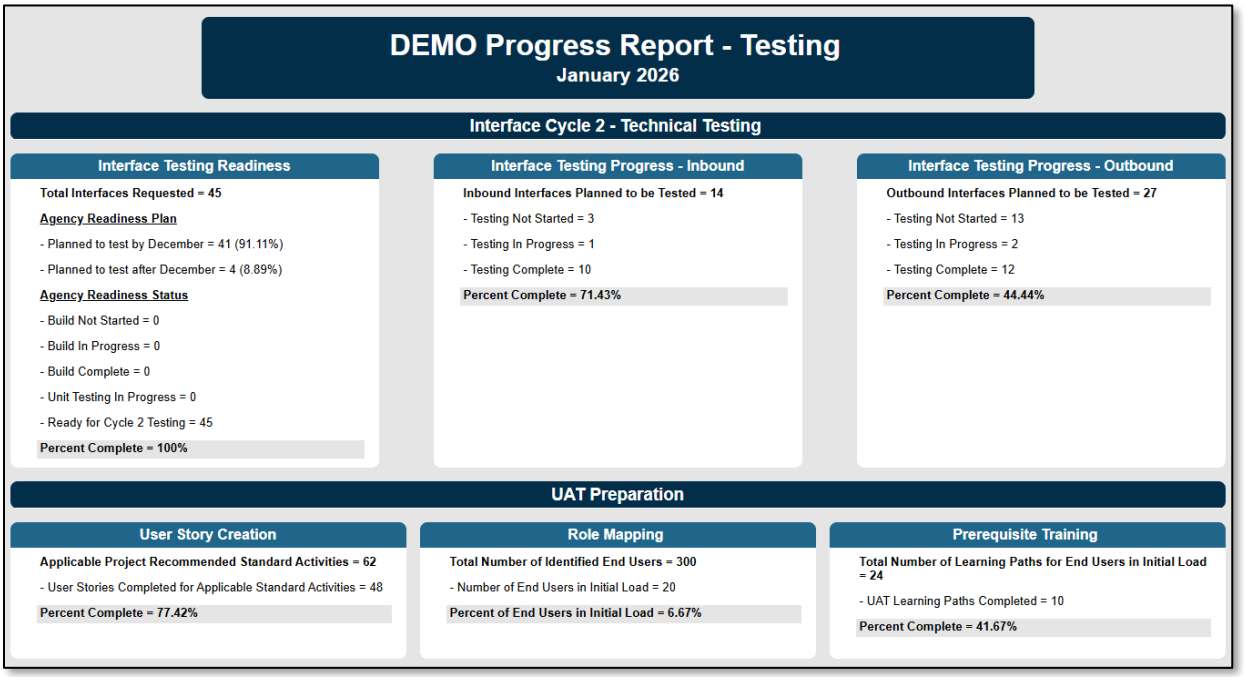


*Figure 1: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 1)*

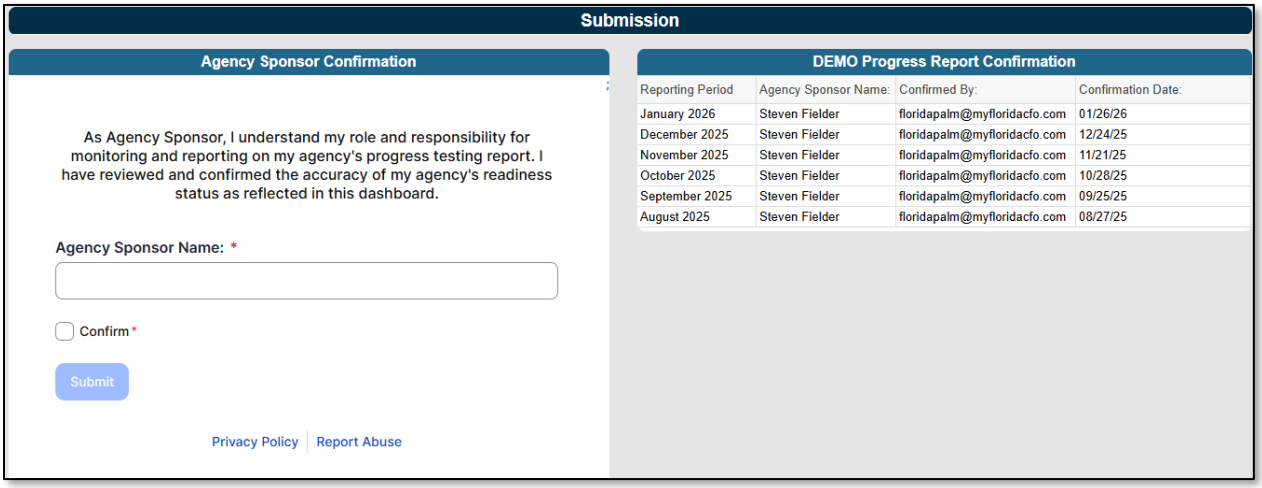


*Figure 2: <Agency Acronym> Monthly Progress Report – Testing Dashboard (Panel 2)*

The Monthly Progress Report dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- *<Agency> Cycle 2 Technical Interface Testing*
- *<Agency> Interface Test Planning*
- *<Agency> Prerequisite Tracking*
- *<Agency> Role Mapping Worksheet*
- *<Agency> Project Recommended Standard Activities*

# Interface Cycle 2 - Technical Testing Section

The Interface Cycle 2 - Technical Testing section (Figure 3) is designed to help you understand your agency's current interface testing progress and status.

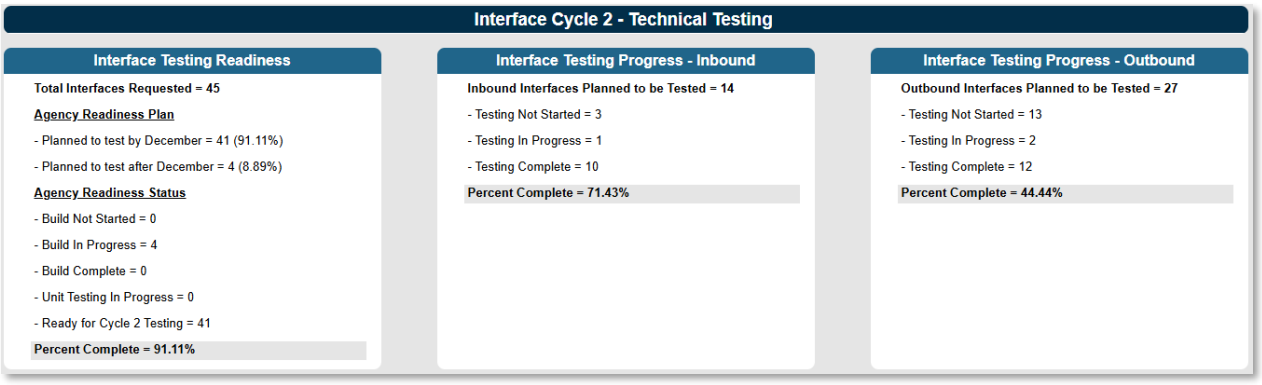


*Figure 3: Interface Cycle 2 - Technical Testing Section*

## Interface Testing Readiness

The Interface Testing Readiness section (Figure 4) displays your agency's Interface Cycle 2 – Technical Testing readiness plans and readiness progress maintained in your *<Agency> Interface Test Planning* worksheet. The Interface Testing Readiness section includes:

- The total number of interfaces requested by your agency
- The Agency Readiness Plan data, showing:
  - The number of interfaces your agency planned to be ready for testing by December and the related percentage (planned to test by December / total number interfaces requested)
  - The number of interfaces your agency planned to be ready for testing after December and the related percentage (planned to test after December / total number interfaces requested)
- The Agency Readiness Status data, showing:
  - The agency-reported Cycle 2 Test Readiness status for all requested interfaces
  - The percent complete calculates the percentage of interfaces that are ready to be tested (Ready for Cycle 2 Testing / Interfaces Requested)

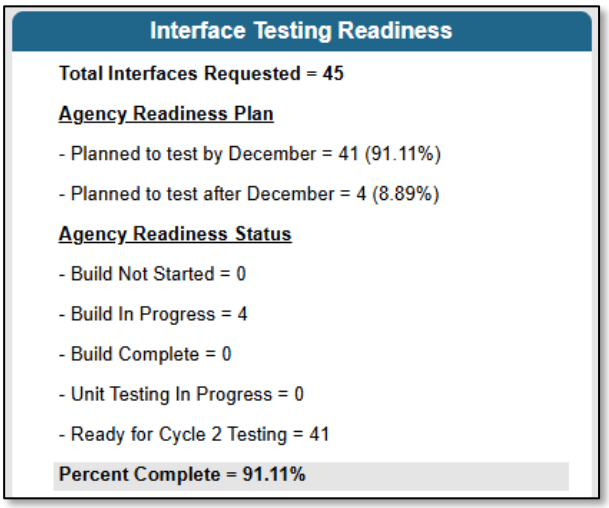


*Figure 4: Interface Testing Readiness Section*

## Interface Testing Progress – Inbound/Outbound

The Interface Testing Progress – Inbound/Outbound section (Figure 5) display, grouped by the direction of the interface (e.g., into Florida PALM, out from Florida PALM), the status of interfaces tested. The data displays your agency's interface testing progress maintained in your *<Agency > Cycle 2 Technical Interface Testing* worksheet.

- *Testing Not Started* indicates the count of interfaces that are planned to be tested (i.e., needed for go live) but testing has not started.
- *Testing in Progress* indicates the count of interfaces that are currently undergoing testing activities.
- *Testing Complete* indicates the count of interfaces that have had at least one successful test.
- *Percent Complete* indicates the percentage of interfaces that have had at least one successful test (Testing Complete / Inbound (Outbound) Interfaces Planned to be Tested).

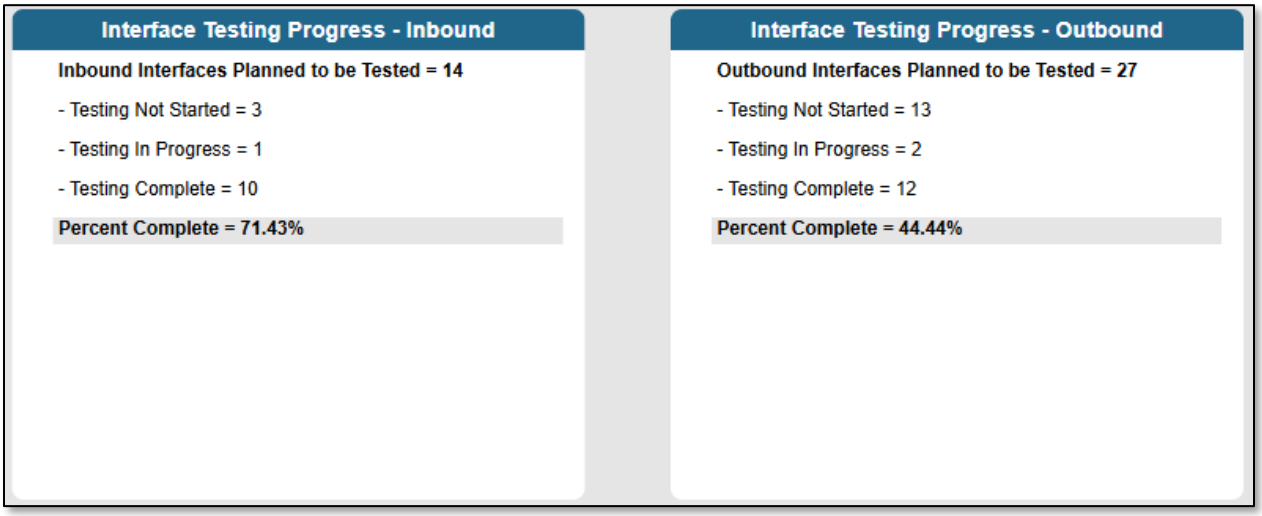


*Figure 5: Inbound/Outbound Interface Testing Section*

***NOTE:*** *The following agencies with no planned interfaces will not have an Interface Cycle 2 - Technical Testing Section: DOEA, DOS, EOG, FSDB, and PSC.*

# UAT Preparation Section

The UAT Preparation section (Figure 6) is designed to help you understand your agency's current UAT readiness progress and status.

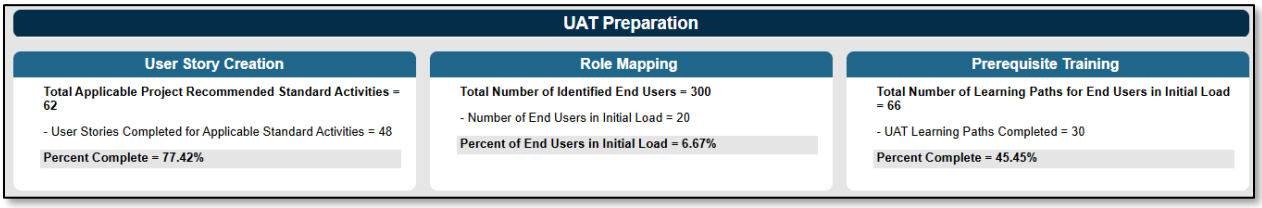


*Figure 6: UAT Preparation section*

## User Story Creation

The User Story Creation (Figure 7) section displays the total number of Project Recommended Standard Activities that are applicable to your agency and the amount of completed User Stories for those Project Recommended Standard Activities maintained in your *<Agency> Project Recommended Standard Activities* worksheet.

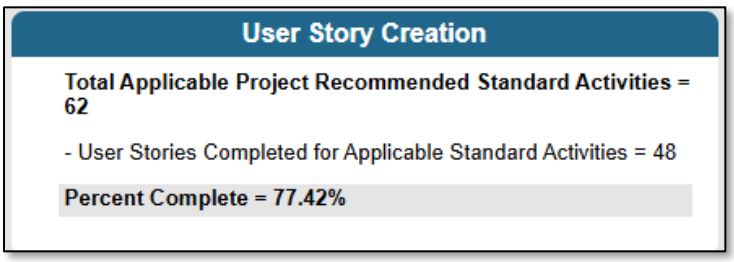


*Figure 7: User Story Creation section*

- *Total Applicable Project Recommended Standard Activities* indicates the complete count of applicable Project Recommended Standard Activities for your agency.
- *User Stories Completed for Applicable Standard Activities* indicates the count of applicable Project Recommended Standard Activities that have had User Stories completed for your agency.
- *Percent Complete* indicates the percentage of completed User Stories in comparison to the number applicable Project Recommended Standard Activities for your agency (User Stories Completed for Applicable Standard Activities / Total Number of Applicable Project Recommended Standard Activities).

## Role Mapping

The Role Mapping (Figure 8) section displays the total number of expected agency end users and the number of end users that will be included in the initial end user load for All Agency UAT.

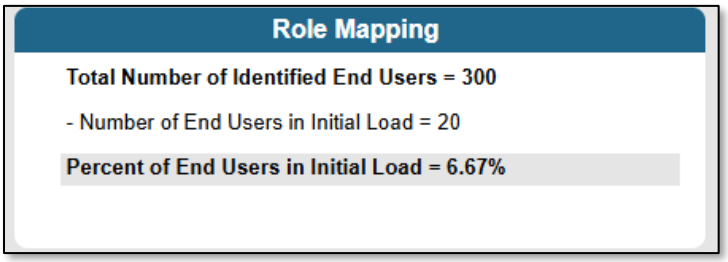


*Figure 8: Role Mapping section*

- *Total Number of Identified End Users* indicates the complete count of end users that your agency has maintained in your *<Agency> Role Mapping* worksheet.
- *Number of End Users in Initial Load* indicates the count of end users that will be included in the initial end user load for All Agency UAT.
- *Percent of End Users in Initial Load* indicates the percentage of end users that will be included in the initial end user load for All Agency UAT (Number of End Users in Initial Load / Total Number of Identified End Users).

## Prerequisite Training

The Prerequisite Training (Figure 9) maintained in your *<Agency> Prerequisite Tracking* worksheet, displays total number of required UAT prerequisite learning paths to be completed by your initial UAT participants and the number of UAT prerequisite learning paths that your initial UAT participants have completed.

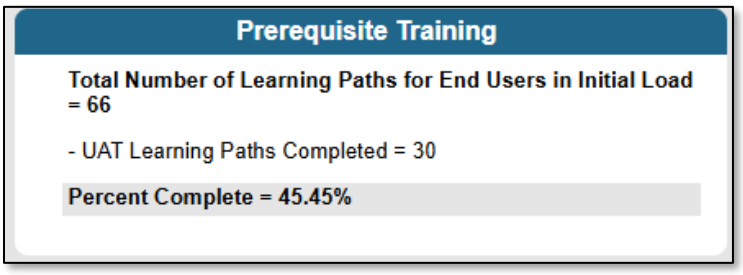


*Figure 9: Prerequisite Training section*

- *Total Number of Learning Paths for End Users in Initial Load* indicates the complete count of required UAT prerequisite learning paths for all initial load UAT end users based on their role assignment in your *<Agency> Role Mapping* worksheet.
- *UAT Learning Paths Completed* indicates the count of completed UAT prerequisite learning paths for all initial load UAT end users based on their role assignment in your *<Agency> Role Mapping* worksheet.
- *Percent Complete* indicates the completion percentage of required UAT prerequisite learning paths for all initial load UAT end users based on their role assignment (UAT Learning Paths Completed / Total Required UAT Learning Paths).

# Submission Section

The Submission Section (Figure 10) includes a form for your Agency Sponsor to confirm and submit your Monthly Progress Report and provides record of previous submissions.

*Figure 10: Submission Section*

## Agency Sponsor Confirmation

The Agency Sponsor Confirmation section (Figure 11) allows for easy submission of the Monthly Progress report. For each reporting period, Primary or Backup Agency Sponsors must review all Dashboard information and provide confirmation that the data represented is accurate.

***NOTE*:** *This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration.*

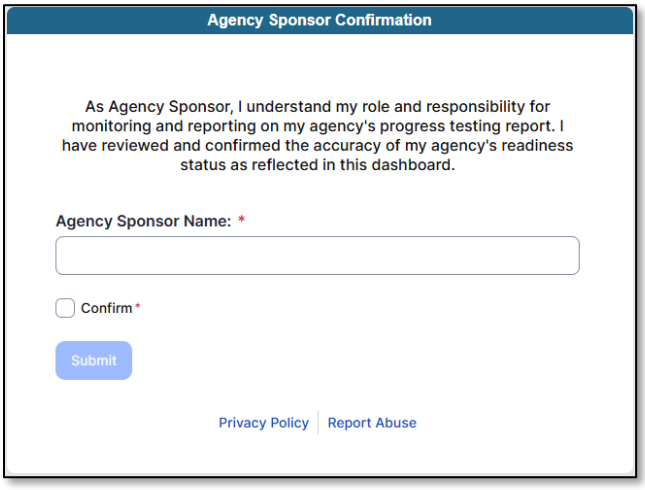


*Figure 11: Agency Sponsor Confirmation*

## Progress Report Confirmation

Upon submission, a confirmation status will appear in the Progress Report Confirmation section (Figure 12).

**DEMO Progress Report Confirmation**

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|---|---|---|---|
| January 2026 | Steven Fielder | floridapalm@myfloridacfo.com | 01/26/26 |
| December 2025 | Steven Fielder | floridapalm@myfloridacfo.com | 12/24/25 |
| November 2025 | Steven Fielder | floridapalm@myfloridacfo.com | 11/21/25 |
| October 2025 | Steven Fielder | floridapalm@myfloridacfo.com | 10/28/25 |
| September 2025 | Steven Fielder | floridapalm@myfloridacfo.com | 09/25/25 |
| August 2025 | Steven Fielder | floridapalm@myfloridacfo.com | 08/27/25 |

*Figure 12: Agency Sponsor Confirmation Report*