

Florida PALM

QUARTERLY NEWSLETTER

QUARTER 1
FY 24/25

PHASES OF IMPLEMENTATION



Design

The Financials and Payroll Design Segments I-IV are complete! All financials and payroll processes that will go live at the Financials and Payroll Wave 2026 implementation have been designed and shared with agencies. Over the course of a year, and through four Design Segments, agency Change Champion Network Liaisons and subject matter experts attended Business Process Model Review meetings and Design Workshops. During this time, attendees learned about process changes and impacts, asked questions, and shared input on the proposed designs that will be configured or built and implemented as Florida's new financial management solution.

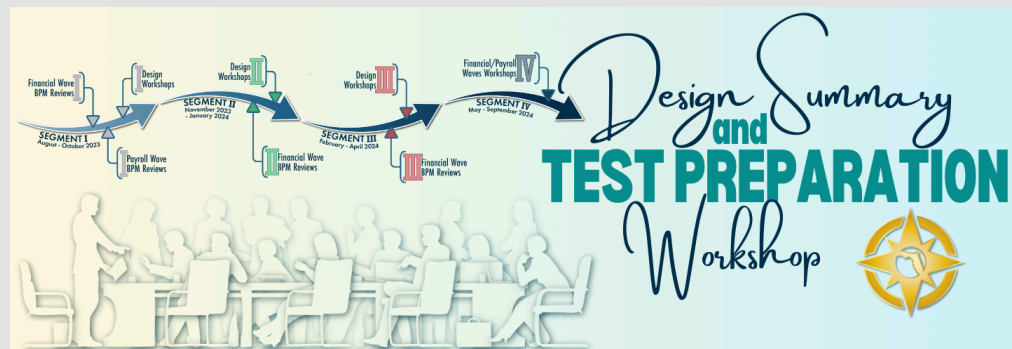
All videos and presentations can be found on the [Business Processes](#) page on the Florida PALM website.



Here's a summary of everyone's hard work:
[Design Workshops Dashboard](#)

A summary of the designs will be provided through a series of sessions on Nov. 12-14. During these sessions, attendees will also hear about how to prepare for agency testing activities.

[Save the date](#) on your calendar for the three-day series workshop.





Build

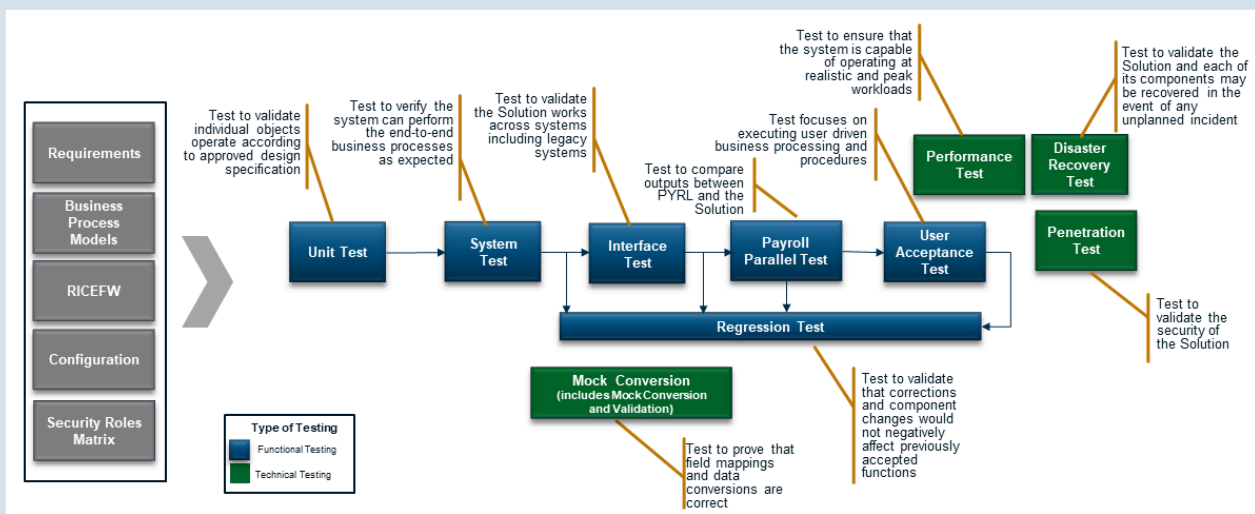
The Build Phase is broken down into four segments. Using the design, the system will be configured, and reports, interfaces, conversions, extensions, forms, and workflows (RICEFW) built by the Project team. The Project has completed Build Segments I and II and is currently in Build Segment III. Agencies will continue remediating their business systems based on Florida PALM interface layouts, readying for interface testing to begin. [Review the Interface Catalog, available in the Knowledge Center.](#)

Agencies have been updating their Configuration Workbooks after each design segment through Readiness Workplan tasks. Agencies will continue to update these as agency-business systems are remediating and data cleansing activities occur. Configuration activities is where agencies let the Project know what agency-specific data (values) needs to be configured into Florida PALM and tested.



Test

Did you know testing has begun? As Build activities are completed, the Project team tests to see if the system functions as it should. There are ten unique testing services (some functional, some technical) that occur at different stages, some overlapping or iterating through most of 2025, to ensure the system is ready before go-live. The next Stage Gate, Ready to Begin UAT, is planned for March 2025.



Agencies play a large role in testing. They have several opportunities to review converted data (mock conversions) and test system configurations and interfaces (UAT). If an agency has selected to use one or more Florida PALM interfaces, their testing has begun by participating in one of three interface testing cycles. Interface testing will ensure agency business systems exchange data accurately with Florida PALM before and during UAT. [Review the Interface Testing Approach.](#)

Agencies have been updating their Conversion Inventory after each design segment by indicating if they have data that needs converting to Florida PALM. After the Project converts data from FLAIR or other source systems into Florida PALM, agencies must evaluate their data is correct through a series of RW tasks and activities. Data from Mock Conversion 3 will be converted into Florida PALM UAT environment for testing by agencies. [Review the Conversion Approach.](#)

Agencies are currently creating a plan for participating in UAT where they are outlining business processes to test, a testing scope, and participants. Next, they will begin developing test scripts and materials. Agencies will use UAT to test and validate, develop end user training and education materials, provide exposure and practice to end users, and confirm agency change impacts to people, processes, technology, and data. [Review the UAT Approach.](#)



Train

The [Training Approach](#) outlines a “Read It, Watch It, Do It” strategy for end user learning. Training development and delivery is a shared responsibility

of the Project and agencies. End users will have opportunities to learn through User Acceptance Testing, Project-delivered trainings, and agency-delivered trainings. An End User Manual will support pre and post go-live end user learning, will provide comprehensive guidance to understand the capabilities of Florida PALM, and how to complete transactions.



Read It

- End User Manual
- Job Aids
- Step-by-step Guides



Watch It

- Functionality Demos
- How-to Videos



Do It

- Instructor-led Training
- Instructor-facilitated Training
- Practice in UAT

AGENCY ACTIVITIES

As we journey towards go-live, agency activities focus on readying their people, processes, technology, and data for Florida PALM implementation, guided by the Project through [Readiness Workplan \(RW\)](#) tasks. During Quarter 1, there were 31 tasks or subtasks that agencies were working on with 13 notated as having a 'direct' impact on progression of Project's activities. Tasks ranged from providing agency configuration vales to remediating business systems, from enabling MFT credentials to creating an agency-specific UAT plan.

Key takeaways for this quarter's tasks were:

- Leveraging current-state processes and documentation is critical for understanding agency people, processes, technology, and data needs.
- Timely submission and accurate completion of tasks is growing in importance as we get closer to go-live.
- Breaking bigger activities (e.g., remediation, data cleansing) into smaller, manageable tasks can help to show progress and improve outcomes.

Three buttons, Summary of Dashboards, Past Due RW Tasks, and Bimonthly Reports, were made available on the Agency Readiness Reporting page of the Florida PALM website. Agency CCN members can still review their agency's readiness information in Smartsheet, but these new tools allow for improved transparency by providing a public view across all entities preparing for Florida PALM. What can visitors to the page see?

- **Summary of Dashboards:** At a glance, they can see the status (red, yellow, green) of four main areas of readiness: CCN Composition, RW Task Completeness, RW Task Timeliness, Project-led Meeting Participation.
- **Past Due RW Tasks:** They can see a current snapshot of past due tasks by agency or by task.
- **Bimonthly Report:** Since the commencement of bimonthly report, they can see the reports submitted by period or by each agency.

NEW TOOLS



SUMMARY OF
DASHBOARDS



PAST DUE
RW TASKS



BIMONTHLY
REPORTS

*Click on the icons above to
access these pages.*

AGENCY QUESTION LOG

*Click on the icon above to
access this log.*

An **Agency Question Log** button was added to the bottom of the Agency Readiness page of the Florida PALM website. This button links to a debut release of a public view of a collection of over 190 agency questions and corresponding responses for shared visibility. Questions and answers will be added regularly so check back!



Debating in early 2024, the Knowledge Center greatly expanded its content during Quarter 1 by housing business process models, process life cycles, reports, conversions, and interfaces for the Design Workshops. It supported agency understanding of the Financials and Payroll Wave designs. The Knowledge Center will continue to grow its content as we progress into testing and training phases. The goal is to ensure that all stakeholders have easy access to up-to-date information and resources. Moving forward, the plan is to incorporate user feedback to enhance the platform, ensuring it meets all evolving needs.

A Secure File Portal was created for agencies to securely exchange sensitive data. This allows the Project and agencies to exchange data securely in preparation for conversion activities. Each agency has a unique portal and has been successfully using it for sharing information.



UPCOMING EVENTS

October 30

Project
Management
Liaison Forum

All Project Management Liaisons are invited to attend!



November 12-14

Design Summary
and Testing
Preparation

Business Liaisons, Technical Liaisons, and SMEs are invited to attend!



December 4

Agency
Sponsor
Summit

All Agency Sponsors are invited to attend. One additional space is also available for each Sponsor's chosen guest.



Visit the [Meetings & Workshops](#) page and save these dates!