

**Helpful Links**

- Dashboard Snapshots
- Florida PALM Workbook for DEMO

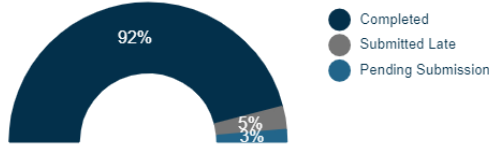
# DEMO Status Report Dashboard

**Reporting Period**  
July - August 2023

**Agency Sponsor**  
Steven Fielder

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

## Readiness Workplan Tasks



The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

## Readiness Workplan Tasks

**Total Tasks = 37**

- Completed = 34
- Submitted Late = 2
- Pending Submission = 1

**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 produced from an agency's financial business operations.

The dials below 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.

**Change Champion Network:**

- Unique Filled Role = 6
- Duplicate Filled Role = 5
- Vacant Role = 3

The Change Champion Network dial reflects the completeness of your CCN makeup.

**Participation:**

- Meetings Attended = 3
- Meetings Missed = 4

The Participation dial reflects your agency's attendance at Project-led meetings.

**Implementation:**

- Training = TBD

**Current-State:**

- Business Processes = TBD

**Implementation:**

- Role Mapping = TBD

**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

**Current-State:**

**Unique FLAIR Data Elements = 30**

- Associated Unique Uses = 75**
- Continued Use - Yes = 50
- Continued Use - No = 25
- Associated Business Systems = 50**

**Cataloged Reports = 164**

- Criticality:** High = 120 Med = 20 Low = 20 None = 4

**Implementation:**

- Conversions = TBD
- Configurations = TBD

## 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/Low)	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 in 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	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/03/23	All agency business systems		

Technology Data					
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### DEMO Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Continued analysis for data clean-up of Org Codes and Project IDs	Ongoing	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.
Data	Participated in Master File Balance working group conducted by A&A	08/14/23	Jane Doe, Bureau of F&A	Provide subject matter expertise to the working group and to expand agency understanding of Master File Balance clean up options	This was the second meeting of the working group, led by A&A. The work group is set to release its results and to present to the Advisory Council on 9/13/23. To support the working group, the agency representative analyzed the agency's current master file balances to determine characteristics and identify potential areas of concern for discussion with the group.
People	Florida PALM Sandbox Lunch and Learn	07/12/23 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
Processes	Started a current-state desktop procedures library	07/14/23	Business process owners throughout the Division of Administration	Create a single location of all procedure documents that will require updating for Florida PALM	Ongoing process, will continue to add to the library as documentation is identified
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.
Technology	Conducted a monthly meeting with agency business system owners to discuss current-state and remediation needs	07/11/23 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).
Technology	Posted procurement to obtain consulting services	08/21/23	Office of Information Technology	Update technical business system documentation in anticipation 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.

**Confirm \***

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### DEMO Status Report Confirmation

Reporting Period	Agency Sponsor:	Confirmed By:	Confirmation Date:
July - August 2023	Steven Fielder	nikki.klein@myfloridacfo.com	08/07/23