

# FloridaP<sup>ALM</sup>

Planning, Accounting, and Ledger Management



Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory document detailing data elements your agency currently uses and how they are being used.
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how your agency manages data security and user access.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the current technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and additional support contacts.
330	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida T resources.
331	N/A	Submit Monthly Agency Health Report	Agency Sponsor to confirm and submit monthly health report, in the Project Health Report template, to the agency to inform the project impact on the agency's financial and operational performance.
332	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
333	People	Create Webinars Headlines Plan	Create a plan to identify and assess impacted stakeholders within the agency that includes agency specific tasks to successfully implement your agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

JANUARY 30, 2025



# Agenda

- ESC Update
- Reminders & Task Updates – Due Dates
- Task Spotlight:
  - 567 - Q Share, Review, Update Configuration Workbook – GL Default Interest Apportionment
  - 582 Share Florida PALM Updates
  - 584 Update Authorized Smartsheet Users
- Budgetary Values in Configuration & Conversion Mapping
- Questions



# Reminder: Upcoming Due Dates

## ~~January 31~~

### New Due Date March 28

- ❖ 536-C – Create Agency Specific User Acceptance Testing Plan
- ❖ 560 – Submit Change Analysis Tool

## February 7

- ✓ 582 – Share Florida PALM Updates
- ✓ 584 – Update Authorized Smartsheet Users

## February 14

- ✓ 567-P SpeedKey Configuration Workbook
- ❖ 658-A – Submit Data Field Mapping (Org) – New Due Date
- ❖ 658-B – Submit Data Field Mapping (OCA) – New Due Date
- ❖ 658-C – Submit Data Field Mapping (Grant ID) – New Due Date

## February 21

- ✓ 567-Q – Default Interest Apportionment Configuration Workbook

## February 28

- ✓ 570 – Manage Agency-specific Implementation Schedule, Risks, Issues



# 567-Q Share, Review, Update Configuration Workbooks

## GL – Default Interest Apportionment

Due February 21

ation Forms Connections Dynamic View DEMO Default Interest Apportionment ☆								
Grid View Filter Arial 10 B I U S A ...								
Configure Value	Business Unit	Fund	Budget Entity	Configured Florida PALM Organization Value	Agency Provided Organization Value	Configured Florida PALM State Program Value	Agency Provided State Program Value	Comments
ⓘ	🔒 fx ⓘ	🔒 ⓘ	🔒 ⓘ	🔒 ⓘ	ⓘ	🔒 ⓘ	ⓘ	ⓘ

- Data for Default Interest Apportionment is as of November 30, 2024 and includes agency submission data from RW Task 541-D
- The Default Interest Apportionment configuration worksheet is not required to be completed by the following agencies: DJJ, DOEA, FCOR, FSDB, PSC, and SCS.



# 582 – Share Florida PALM Updates

Due February 7

## Resources:

- Florida PALM Update Resource: Highlights and links to key Project Activities
- Agency Exchange Library

Stakeholder Group	Example Communication Topics	Example Communication Channels
Agency Leadership	<ul style="list-style-type: none"><li>• Agency progress towards milestones</li><li>• Risks and mitigations</li><li>• Resource needs (e.g., positions or funding)</li></ul>	Executive Briefings
CCN and SMEs	<ul style="list-style-type: none"><li>• Agency transformation activities</li><li>• Agency readiness tasks</li></ul>	Workshops, Meetings, Emails
Implementation End Users	<ul style="list-style-type: none"><li>• Training opportunities</li><li>• Key milestone dates (Project and Agency)</li><li>• Change Impacts (e.g., COA changes, configuration values)</li></ul>	Posters, Newsletters, Meetings, Emails
Other	<ul style="list-style-type: none"><li>• Information specifically affecting a team (e.g., Agency Business System team)</li></ul>	Briefings, Emails





# 584 – Update Authorized Smartsheet Users

Due February 7

Florida PALM Workbook for DEMO

Actions

Create

Share

	Name	Sharing	Owner	Last Update
<input type="checkbox"/>	Agency Readiness	Workspace	Florida PALM	04/27/23
<input type="checkbox"/>	Archive (Reference Only Materials)	Workspace	Florida PALM	08/10/23
<input type="checkbox"/>	Data Security and Access Survey	Workspace	Florida PALM	01/19/23
<input type="checkbox"/>	Inventories	Workspace	Florida PALM	04/27/23
<input type="checkbox"/>	Status Reporting	Workspace	Florida PALM	07/21/23
<input type="checkbox"/>	Templates	Workspace	Florida PALM	05/16/23
<input type="checkbox"/>	Allotment Control Option Selection	Workspace	Florida PALM	19 hours ago

Workspace Shared To

Florida PALM

Owner

floridapalmtest@outlook.com

Editor - can share

steven.fielder@myfloridacfo.com

Editor - cannot share

Angie Robertson

Editor - cannot share

Florida PALM Readiness Coordinators (Group)

Editor - cannot share

Jimmy Cox

Editor - cannot share

Tatiana Eubanks

Editor - cannot share

flptest21@outlook.com

Viewer



# Budgetary Values

- ▶ Budgetary Values can not be selected for Configuration/Conversion Mapping in:
  - Distribution Code
  - CRA
  - Default Interest Apportionment
  - Org Security Rule
  - Org – Conversion Mapping
  - SpeedKey





# Questions?



***Lilith! “Mother of Demons”***

CONTACT US

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