

FloridaPALM

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 all 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. Re-documentation of current systems technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency 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.
	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida resources.
	N/A	Submit Monthly Agency Status Report	Agency Sponsor to confirm and submit monthly status report, in the Project, and identify any issues arising within the agency to project impact responses for implementation of the PALM.
		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM Implementation.
		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM Implementation.
		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM Implementation.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

JULY 10, 2025



Agenda

- UAT Prerequisites
- Task Spotlight:
 - 574 Addendum – Prepare Documentation for User Acceptance Testing
- Role Mapping Update
- Reminders



User Acceptance Testing – Testing Prerequisites

User Acceptance Testing Materials

- UAT Prerequisites
- Process Steps (coming soon)

UAT Prerequisites

- Training Liaison Role in Completion of UAT Prerequisites
 - Ensuring Users Know Their Required Trainings
 - Guide and Support Users to access People First LMS
 - Monitor and Report Training Progress & Completion
 - Ensure Timely Completion
 - Verify all Items are Completed by End Users for Required Programs
- Required Learning for UAT Online (SME)
- UAT Online (SME) Learning Paths



574 Addendum - Prepare Documentation for UAT

Due 8/8/2025

Project Recommended Standard Activities

- ▶ Updated Florida PALM Topics & Activities List
- ▶ At least one User Story created for all activities in this list applicable to your agency
- ▶ Record User Story status and number in new Smartsheet: <Agency> *Project Recommended Standard Activities*

Forms Connections Dynamic View DEMO Project Recommended Standard Activities ☆							
Grid Filter Arial 10 B I U S A ...							
Percentage of User Stories Created	Business Process Grouping (BPG)	Process Module	Topic Name	Activity Name	User Story Creation Status	Number of User Stories Created	Comments
0.00%	AAM	AM	Acquire and Set Up Assets	Importing Assets			
	AAM	AM	Acquire and Set Up Assets	Manually Creating and Updating Asset Records			
	AAM	AM	Acquire and Set Up Assets	Manually Creating and Updating Asset Records with Cost Information Only			
	AAM	AM	Acquire and Set Up Assets	Running the Transaction Loader Process			
	AAM	AM	Executing Disposal	Initiating a Disposal Request			
	AAM	AM	Executing Disposal	Reviewing and Approving Asset Disposal Requests			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Executing Transfer of Assets - Inter/IntraUnit			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Initiating Transfer Request - Inter/IntraUnit			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Reviewing and Approving Asset Transfer Requests - Inter/IntraUnit			
	AAM	AM	Reviewing, Updating and Approving Information in the Staging Table	Reviewing and Updating Asset Information			
	AAM	AM	Updating with the Results of the Physical Inventory	Extracting List of Assets to be Included in Physical Inventory			
	AAM	AM	Updating with the Results of the Physical Inventory	Reconciling and Creating Asset Records			



Role Mapping Update

- ▶ RW Task 573-B releases next week
- ▶ Role Mapping and Implementation End User Worksheets will be merged into one sheet moving forward
- ▶ UAT SME Role Mapping submitted for 573-A and the Implementation End User Worksheets will be locked/archived today in preparation for Role Mapping to reopen next week



Reminders: Upcoming Task Due Dates

July 10

- ✓ 611 – Submit Bimonthly Agency Readiness Status Report

July 11

- ✓ 591 - Confirm IdP Configuration for Florida PALM
- ✓ 610 - Update Authorized Smartsheet Users

July 18

- ✓ 593 - Update Agency Readiness Certification #1

July 25

- ✓ 576 - Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing

August 8

- ✓ 574 - Prepare Documentation for User Acceptance Testing

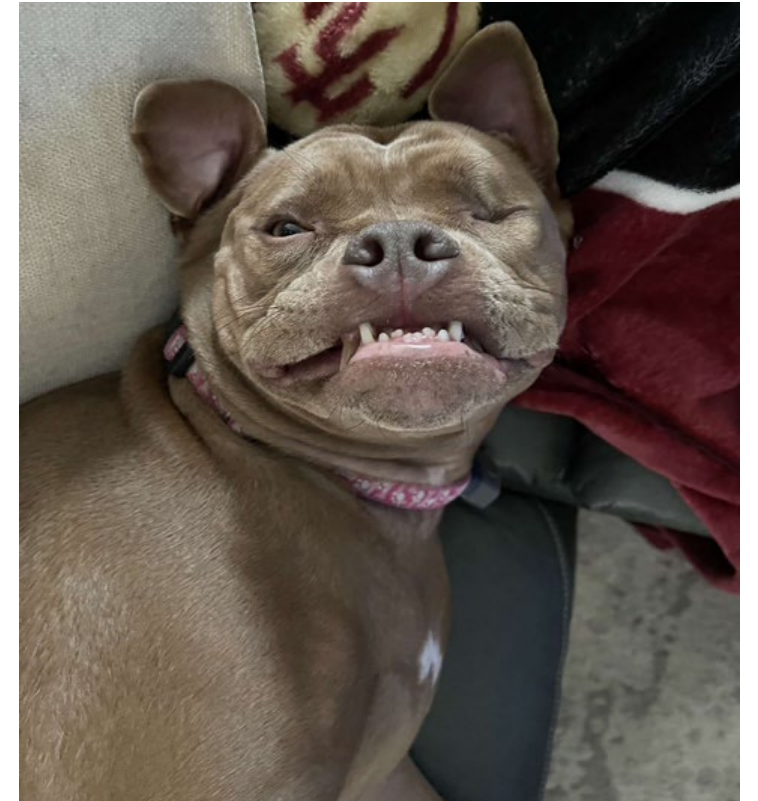


MAZIKEEN
“MAZE” COLE



Questions?

ATHENA
“BIG BOOTY”
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