

# Florida PALM

Planning, Accounting, and Ledger Management



# THURSDAY Task Talk

*Hosted by the Florida PALM Readiness Team*

JANUARY 15, 2026



# Agenda

- ▶ Action Required: DW/BI Role Mapping Update
- ▶ Task Spotlight: 597 – Complete Data Cleansing Based on Mock Conversion 4
- ▶ Project Updates
- ▶ Reminders
- ▶ Questions



# Action Required: DW/BI Role Mapping Update

**Due 1/23/2026**

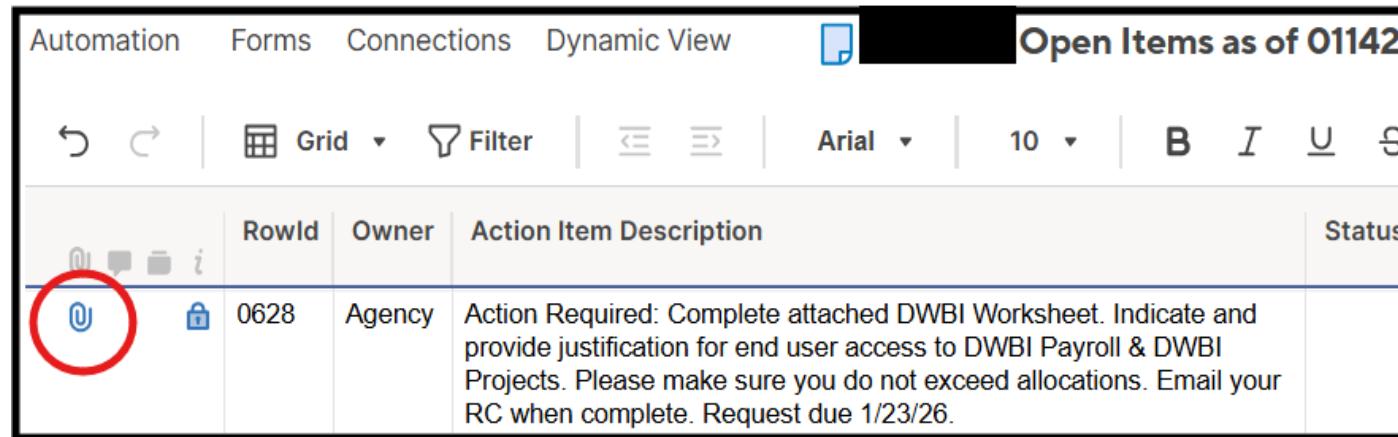
- ▶ Resource: New Knowledge Center article on DW/BI Overview
- ▶ DW/BI Approach for UAT
  - All end users with DW/BI access will be assigned the role of Consumer to start UAT
    - DW/BI sessions attendees in April will be assigned Author role to gain understanding of self-service functionality
  - All end users for Financials access will be loaded as Financials Consumers
  - DW/BI access requires an individual license and licenses are limited. Each agency has been allotted a specific number of licenses per data access type for Financials, Payroll, and Projects based on agency need (e.g., applicability), size and number of end users.
    - Most agencies submitted requests beyond the license allotment for DW/BI Payroll and Projects
- ▶ Agency Action Required
  - Provide update to access requests for DW/BI Payroll and Projects



# Action Required: DW/BI Role Mapping Update

Due 1/23/2026

- ▶ Access your worksheet in your Agency Readiness> Agency Open Items tracker – file attached to the Smartsheet row (<Agency> Projects and Payroll DW/BI Access)
- ▶ Review your agency allotments for DW/BI Payroll & DW/BI Access
- ▶ Indicate and adjust end user access to match Maximum Allowed
- ▶ If your agency is not converting Projects (PCC001) and you have indicated DW/BI Projects access, complete required justification
- ▶ Send your completed file to your Readiness Coordinator



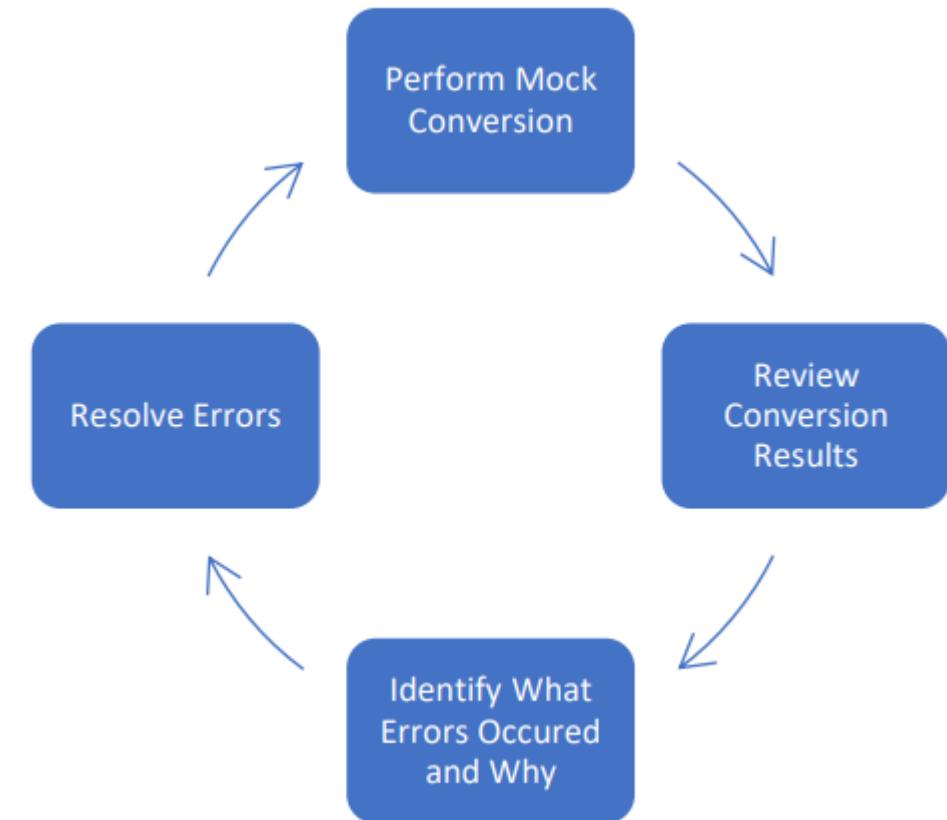
Open Items as of 01142026				
	RowId	Owner	Action Item Description	Status
	0628	Agency	Action Required: Complete attached DWBI Worksheet. Indicate and provide justification for end user access to DWBI Payroll & DWBI Projects. Please make sure you do not exceed allocations. Email your RC when complete. Request due 1/23/26.	



# 597 – Data Cleansing Based on Mock Conversion 4

**Due 3/13/2026**

- Review the Mock Conversion 4 results for AMC001, APC001, CTC001, GLC001, GMC001, KKC001, PCC001, PCC002, and POC001.
  - Data is as of November 8
  - Perform data cleansing, if applicable. Update Mock Conversion worksheet in Smartsheet to indicate progress.
  - Dry Run 1 will begin March 16.



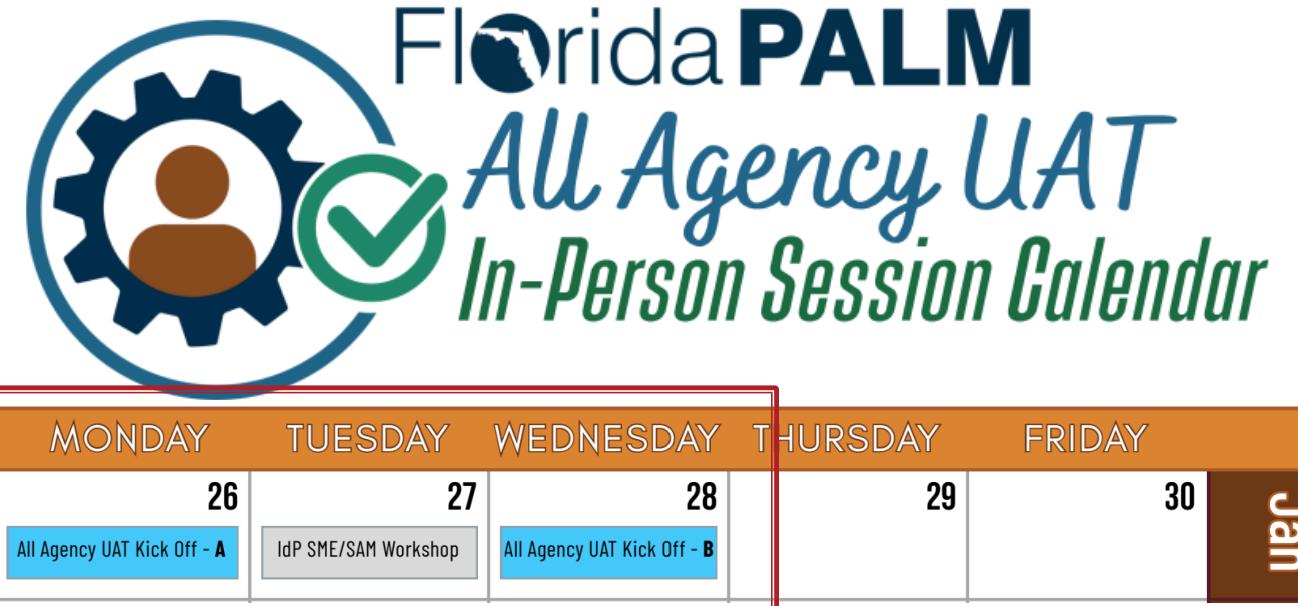
## Convergeration

- Conversion Mapping worksheets are open
- Configuration Workbooks are open
  - Agency provided sheets and system configured sheets are in Archive folders
  - Agency Supplier Record worksheet remains locked. Agencies must contact RC if updates are needed.



# Project Updates

- UAT Project-Hosted Participant Identification is Open!
  - Calendar shared for Monthly and Biweekly agencies
  - Choose up to 3 per subject matter;
    - Exception is Payroll - 3 different individuals for the 2 different Payroll subject matter sessions
  - Identify your 3 participants for each subject matter and mark complete in Smartsheet: Agency Readiness > Agency Role Mapping
  - Let your RC know when complete
  - Due January 16
  - Kick-off registration will be sent to participants beginning next week



Forms Connections Dynamic View

DFS UAT Participant Identification

Participant Name (First and Last) Participant Email Address 1- Readyng the System for Processing & Supporting Subject Matter 1 Assignment Complete 2 - Processing Payroll Days 1, 2 & 3

Use this row to indicate when you have identified all three participants for the related subject matter.

N/A

Yes. I have identified 3 participants for Subject Matter 1 - Readyng the System for Processing & Supporting

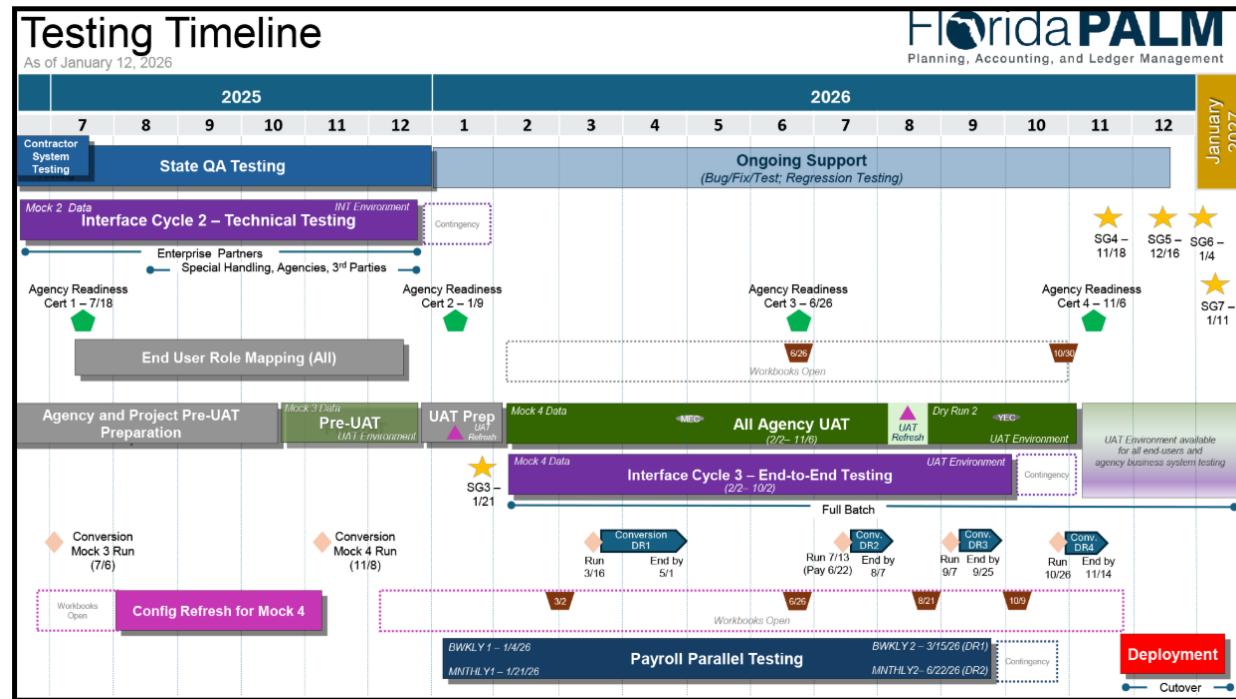
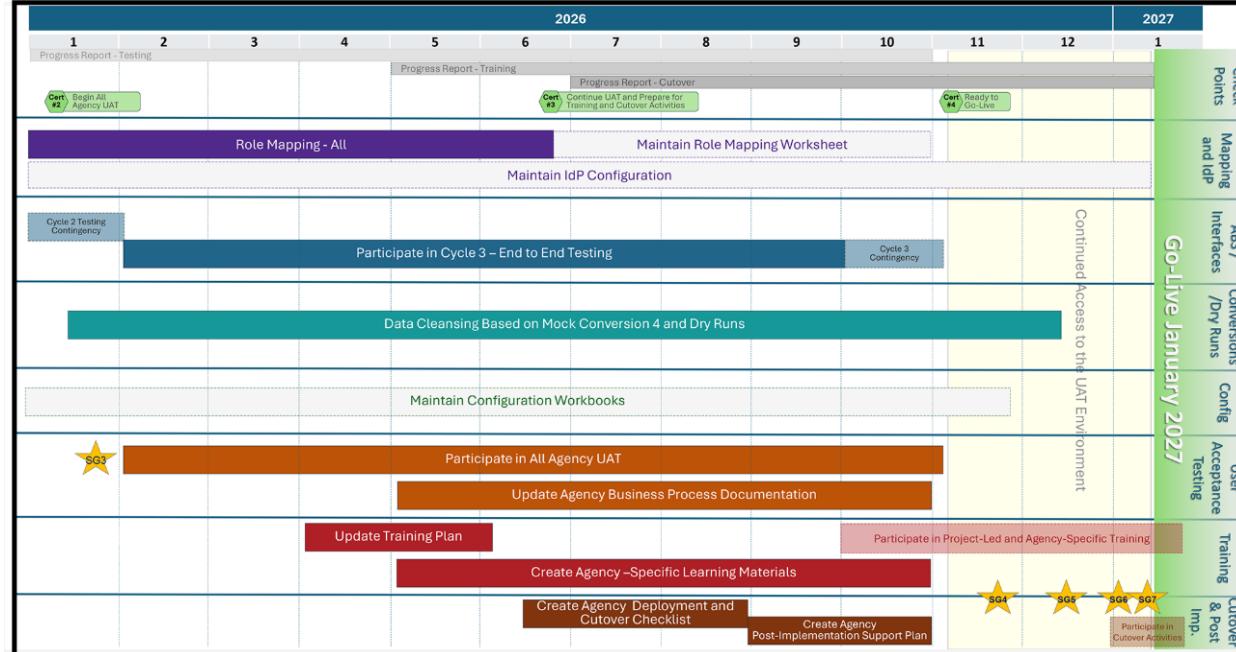
Vincent Cicco Vincent.Cicco@myfloridacfo.com Yes

Nikki Klein Nikki.Klein@myfloridacfo.com Yes

Angie Robertson Angie.Robertson@myfloridacfo.com Yes

# Project Updates

- Readiness Workplan released
  - Updating dates to align with the Project Schedule
  - Adding Monthly Progress Reporting and Bimonthly Status Reporting tasks
  - Updating dates for tasks that were previously in delayed status
  - Shifting dates for Training and Cutover tasks
  - Removing Task 663 – Update UAT Documentation
- Implementation Roadmap published
- Testing Timeline – Draft removed



# Reminders

## Current Tasks Due Dates:

### Wednesday, January 14

- ✓ 671 – Submit Bimonthly Agency Readiness Status Report

### Friday, January 16

- ✓ Identify UAT Session Participants

### Friday, January 23

- ✓ DW/BI Role Assignment Request
- ✓ 670 – Share Florida PALM Updates

### Friday, January 30

- ✓ 669 – Submit Monthly Progress Report





**Questions?**

CONTACT US

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PROJECT WEBSITE

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KNOWLEDGE CENTER

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