

FloridaPALM

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

JANUARY 15, 2026



FloridaPALM
Planning, Accounting, and Ledger Management

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

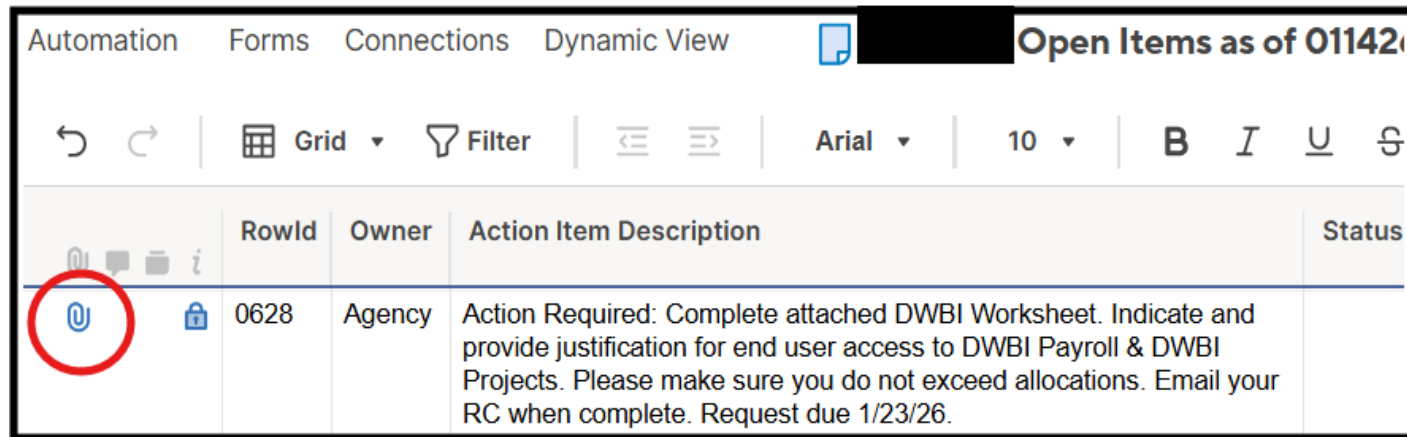
- ▶ Resource: *New Knowledge Center* article on DW/BI Overview
- ▶ DW/BI Approach for UAT
 - All end users with DW/BI access will be assigned the role of Consumer to start UAT
 - DW/BI sessions attendees in April will be assigned Author role to gain understanding of self-service functionality
 - All 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



Automation Forms Connections Dynamic View [Redacted] Open Items as of 01/14/2026				
↶ ↷ Grid ▾ Filter ⌵ ⌶ Arial ▾ 10 ▾ B I U ⌵				
	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.	

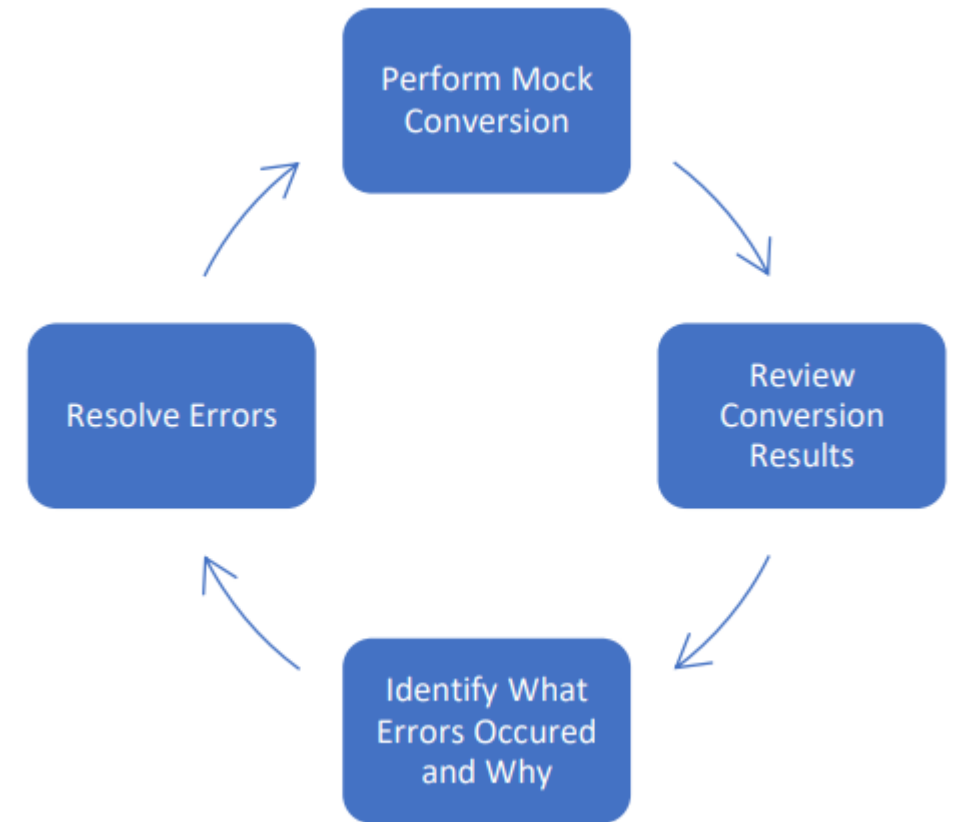
597 – Data Cleansing Based on Mock Conversion 4

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

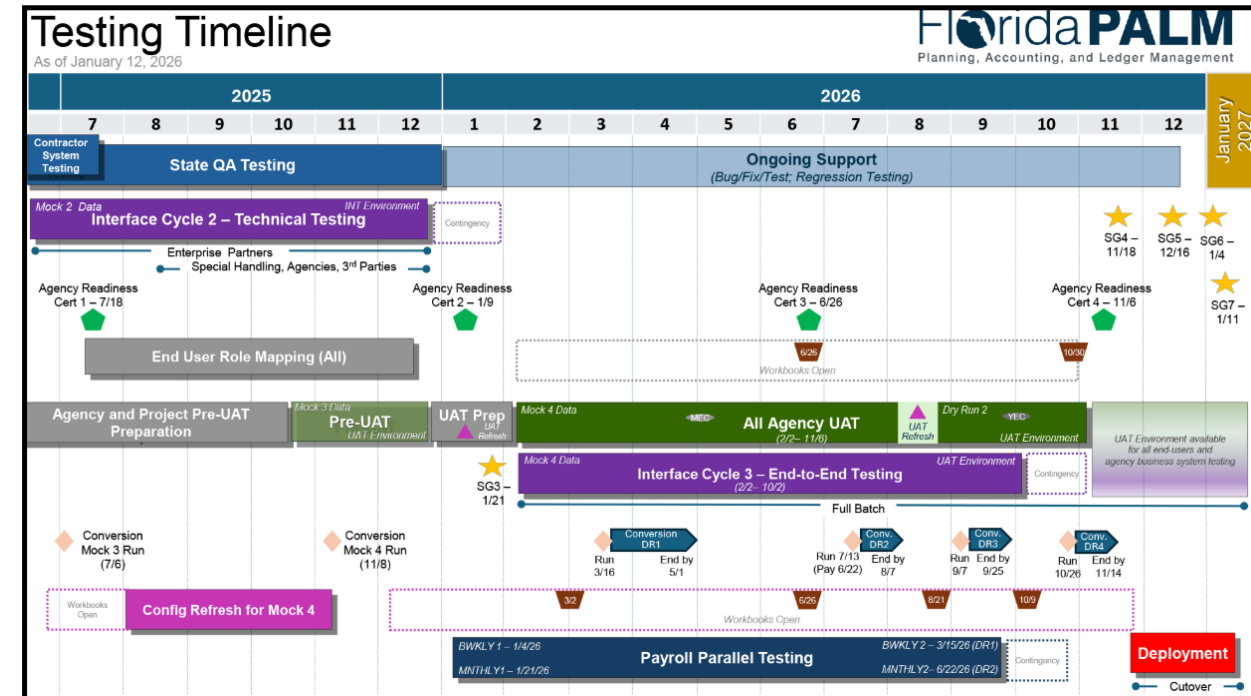
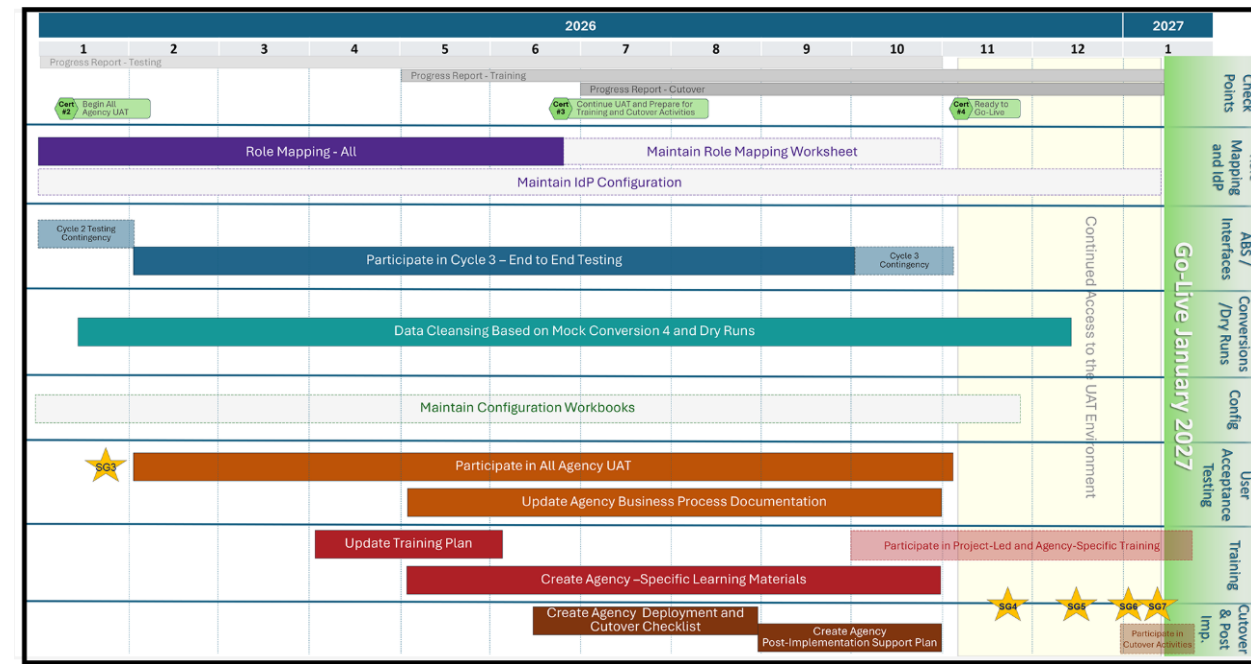


MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
26	27	28	29	30	Jan
All Agency UAT Kick Off - A	IdP SME/SAM Workshop	All Agency UAT Kick Off - B			

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.	Yes		
Nikki Klein	Nikki.Klein@myfloridacfo.cor	Yes		
Angie Robertson	Angie.Robertson@myflorida	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

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

WWW.MYFLORIDACFO.COM/FLORIDAPALM/

KNOWLEDGE CENTER

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