

FloridaPALM

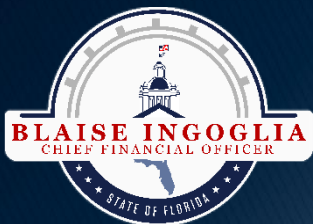
Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

APRIL 9, 2026



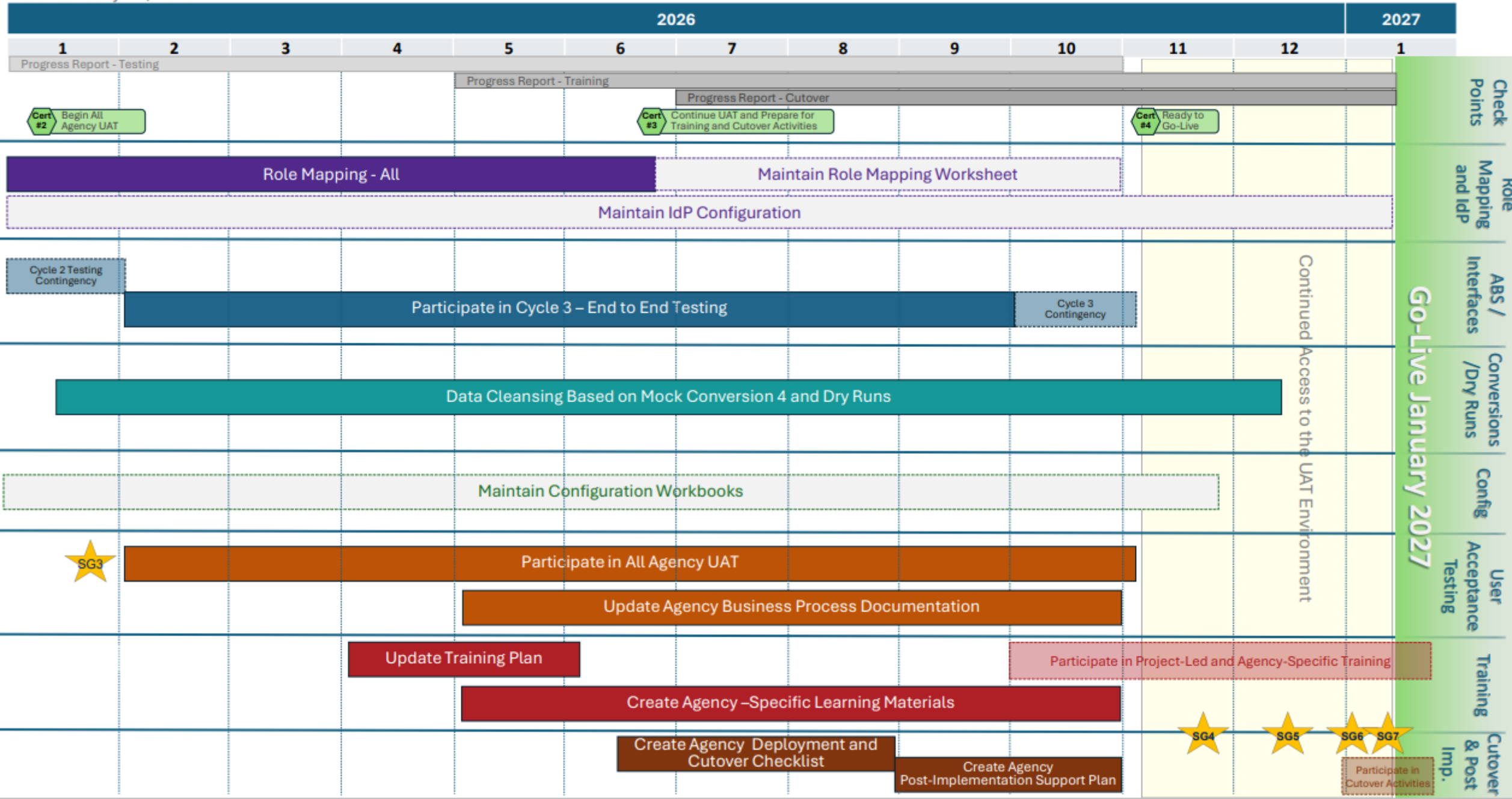
Agenda

- ▶ Agency Implementation Timeline Review
- ▶ 607 – Update Training Plan
- ▶ Workbook Maintenance
 - Configuration and Conversion
 - Role Mapping
- ▶ Reminders
- ▶ Questions



Implementation Timeline for Agency Readiness

As of January 12, 2026



607 – Update Training Plan

Due 6/5/2026

What To Do:

- Review and update your agency-specific Training Plan (RW Task 568)




Elements and Considerations:

- Roles & Responsibilities
 - Internal, external, teams, resources needed
- Planning and Execution
 - Identify audience and participants
 - Logistics – approach, timeline, activities
 - Curriculum and Materials – content, design, delivery, activities
 - Timeline
 - Tracking and Measurement



607 – Update Training Plan

Due 6/5/2026

| | | |
|--|---|---|
|  |  |  |
| <h2>Read It</h2> | <h2>Watch It</h2> | <h2>Do It</h2> |
| <ul style="list-style-type: none">• End User Manual• Job Aids• Process Steps | <ul style="list-style-type: none">• Functionality Demos• How-to Videos• Project-hosted UAT Sessions | <ul style="list-style-type: none">• Instructor-led and Web Based Training• Instructor-facilitated Training• Practice in UAT |



Configuration and Conversion Workbooks

Be Error Free!

What To Do:

- Resolve errors in ALL configuration and conversion workbooks.
- Ensure ALL configuration and conversion workbooks are complete.
 - As new agency-specific COA codes are created in FLAIR and/or UAT, add those values to your workbooks, as applicable.
 - Update all rows requiring agency input, clearing all yellow and red cells.

Resources:

- Consolidated Error Message Report
- Configuration & Conversion Workbook Supplementals
- Configuration & Conversion Workbook Checklist
- **Reach Out!** Readiness Coordinators and Project Team members welcome your questions and are ready to engage your team to provide guidance.

****Conversion workbooks are currently locked during Dry Run 1.**

They will be unlocked on 4/20.**



Role Mapping Worksheet

Be Error Free!

Review and Update Role Mapping Worksheet

- Ensure ALL future end users are listed with applicable roles.
- Review all error messages, conditional formatting, and missing information in your <Agency> Role Mapping worksheet.
- Review DW/BI user access and roles – DW/BI Error Messages column.
- Review and remediate SOD conflict errors – SOD Errors column.
- Work with your SAM to provide regular UAT User Access reports to reconcile access with your role mapping worksheet.

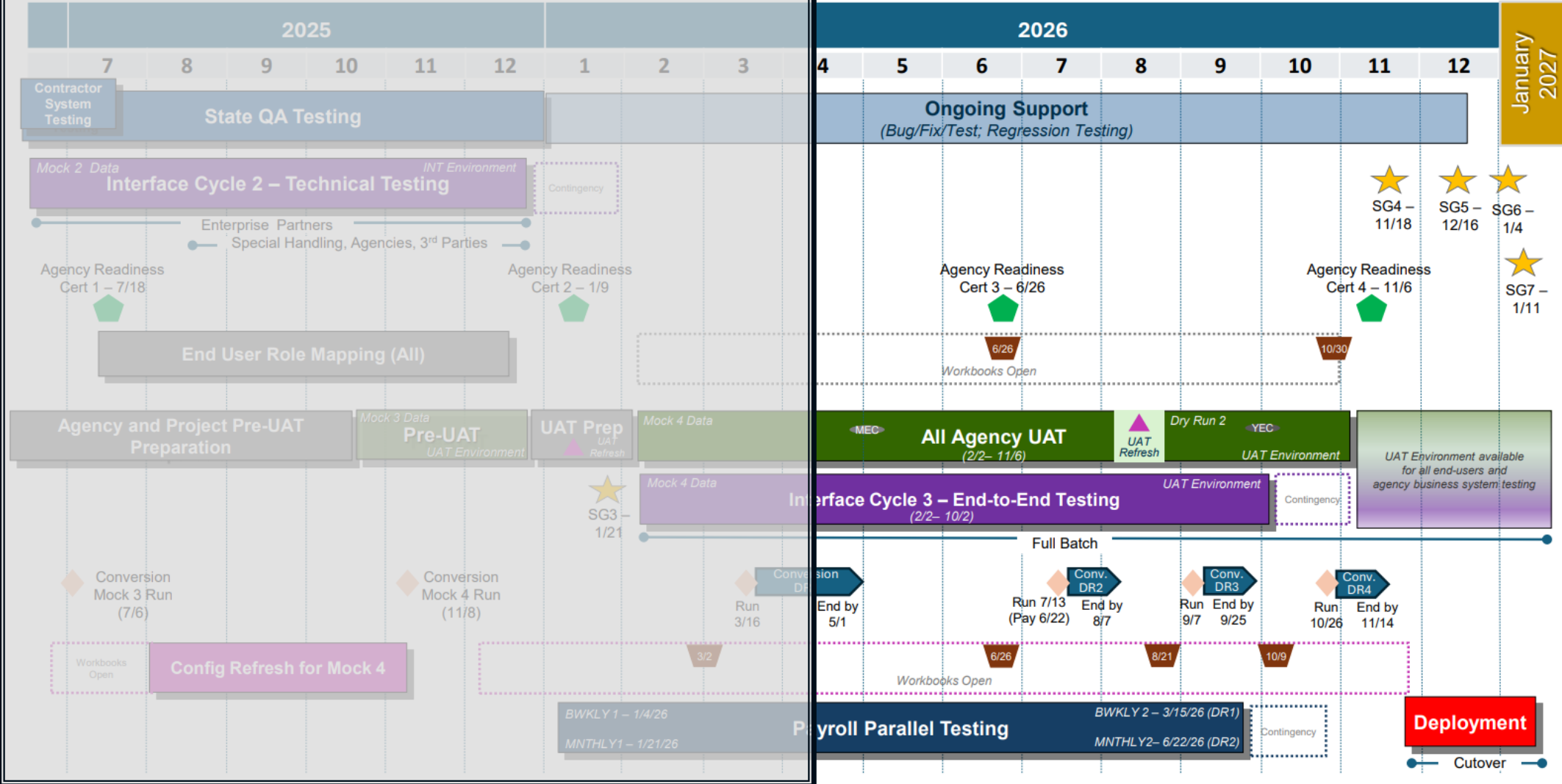
Resources:

- Role Mapping Supplemental for details on how to maintain your worksheet for UAT Refresh
- Knowledge Center: Role Assignment Overview, End User Role Conflict Matrix, Agency SOD Conflict Matrix, End User Articles.
- CFO Memo #34.



Testing Timeline

As of January 12, 2026



Reminders

Current Tasks Due Dates:

Thursday, April 30

- ✓ 675 – Submit Monthly Progress Report - Testing
- ✓ 696 – Maintain Role Mapping Worksheet
- ✓ 697 – Maintain Configuration & Conversion Workbooks

Friday, June 5

- ✓ 607 – Update Training Plan

BE PREPARED

To ensure a successful UAT experience, prepare yourself by completing these steps first.

- Complete the Prerequisites**
Find which trainings are required for your role(s) based on Business Process Grouping on the [UAT Prerequisites](#) page in the Knowledge Center.
- Confirm your UAT Access**
Before arriving at your assigned UAT session, confirm you are able to log into the [UAT environment](#). Log in from a remote location, outside of your network.
- Confirm your Role(s)**
Confirm with your SAM that you have been given the role(s) you'll need during your assigned UAT session. The [Pre-Materials](#) page on the Knowledge Center lists the roles needed for each UAT subject matter.
- Review the Pre-Materials**
Review the Process Steps and Demo Videos on the Pre-Materials page on the Knowledge Center. Become familiar with basic navigation and attempt to follow the Process Steps.
- Identify your Testing Support contacts**
Familiarize yourself with your agency [UAT Coordinators](#), your agency [SAM](#), and your Testing Error Triage team. These individuals will help with any environment access or role assignment issues, or with troubleshooting testing issues.
- Check the UAT Communications Page regularly**
The [UAT Communications](#) page in the Knowledge Center is your central location for UAT information. By "following" the page, you can be alerted when new messages or information is made available. [FOLLOW](#)

Questions?



Working Together to
Transform Florida

FloridaPALM
Planning, Accounting, and Ledger Management



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