

Date	11/05/2015	Time	1:30 – 4:30 p.m.
Location	Winewood/DCF – Bldg. 4		
Objective	Requirements Review Workgroup – Data Management, Support, Operations Management, and Transaction System		
Attendees	<p>Alissa Martz (DMS), Andrew Gutsch (FDLE), Anne Rabon (DMS), Brenda Lundberg (DBPR), Bruce Wolin (DOH), David Luke (DMS), Dawn Edwards (DOE), Derrick Thomas (DMS), Donny Crume (DEO), Eric Larson (AST), Jennel Johnson (DOH), Joe Wright (DOH), John Carter (DOR), Mannix Hawkins (DEO), Michael McBride (FDOT), Michelle Marowski (DBPR), Paul Yu (DOH), Sarah Hamilton (DMS), Sarah Close (FDOT), Scott Lindsay (DACS), Stephen Hobbs (DEO), Steve Grantham (DOEA), and Victor Gaines (DHSMV).</p> <p>Attended remotely: Denise Overstreet (SC), Jane Essig (DACS), Jennifer Gray (SC), Karen Sutterfield (DOH), Liz Gentry (DACS), Roosevelt Sawyer, Jr. (DFS), Ross Durant (FDVA), Sudheer Goriparthi (DOH), and Travis Tackett (FDOT).</p> <p>Florida PALM Project Team: Allyson Adolphson (DFS), Angie Robertson (DFS), Deana Metcalf (DFS), Eric Adair (DFS), Julian Gotreaux (DFS), Sean Cooley (DFS), Stanton Beazley (DFS), and Sundar Ramanathan (DFS).</p>		
Attachments/ Related Documents	Requirements Review Workgroup – Data Management, Support, Operations Management, and Transaction System Presentation		

Topic	Facilitator
Welcome and Introductions	Julian Gotreaux
Notes: <ul style="list-style-type: none"> Julian welcomed the group, shared the ground rules, and gave an overview of the facility. Eric introduced the Project Team members and asked each participant to introduce themselves including their agency and title. 	
Background and Purpose Overview of Technical Requirements	Eric Adair
Notes: <ul style="list-style-type: none"> Eric presented the background and purpose for the Project. He then provided an overview of the Project's collaborative efforts, architecture principles, and requirements review process. 	
Requirements Questions & Discussion <i>Data Management</i>	Eric Adair
Notes: <p>Q: Stephen Hobbs (DEO): There are requirements addressing integration with FLAIR. Will the vendor provide a systematic way to move existing data or balances into the new system, or is this a function of uploading?</p>	

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<p>A: Florida PALM is procuring a single Software and System Integrator (SSI). Integration capabilities are covered in the technical requirements (Integration Architecture and Data Management categories) and also in the Invitation to Negotiate (ITN).</p> <p>Q: Michael McBride (FDOT): Will FLAIR be used until it's shutdown and agencies begin using the new system without any data? Or will the data in FLAIR be moved into the new system?</p> <p>A: Florida PALM Project: How much historical data is put into the new system will be determined at a later time. FLAIR will be used until agencies are operating on Florida PALM..</p> <p>Q: Michael McBride (FDOT): SDS-081 refers to an event-based framework. Does this apply to all agencies?</p> <p>A: Florida PALM Project: The requirement is a technical capability and not specific to DFS. This technology is needed for Florida PALM and can be leveraged by any agency. The Project acknowledges the importance of agency business systems and will communicate appropriately.</p> <p>Q: Bruce Wolin (DOH): Referencing SDS-081, SDS-082, and SDS-083, part of the Project's vision appears to be having multiple in-state and out-of-state systems able to interface. Will this work in real-time?</p> <p>A: Florida PALM Project: This can't be determined until a system is selected.</p> <p>Q: Bruce Wolin (DOH): With all the integration points, what type of security will be in place?</p> <p>A: Florida PALM Project: There are a number of requirements addressing data security (Enterprise Security Category), including encryption as a technical capability. These requirements address security down to the program level where data must be secured and sanitized. Security will be extensively coordinated.</p> <p>Q: John Carter (DOR): Will agencies have to provide support to represent business receivables and synchronize master data? Will the Project decide to make this a requirement before the procurement or based on responses?</p> <p>A: Florida PALM Project: There are currently requirements for master data management (MDM), including what data will be published. Certain capabilities may be eliminated through negotiation with the vendor based on complexity, cost, and other factors. In the design phase, the functional and technical capabilities will be brought together. Agency business systems may interact differently with the new system than they do with FLAIR. Any decisions impacting agency business systems and integration will be communicated with agencies.</p> <p>Q: Sarah Close (FDOT): Referencing SDS-024, is the Florida PALM system intended to interact with existing governance?</p> <p>A: Florida PALM Project: Existing governance bodies will be leveraged but may be adjusted. Participation in governance will be driven by the business requirements. New technologies may require a nuanced federation of data. This may also mean new roles. The governance must be collaborative to meet all agencies' needs.</p> <p>Q: Michael McBride (FDOT): Will the ITN evaluation include agencies?</p> <p>A: Florida PALM Project: The members of the evaluation team haven't been determined.</p>	

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<p>Q: Eric Larson (AST): On the business requirement you have an OData (Open Data Protocol) standard for REST (representational state transfer) APIs (application program interfaces), but on the customer requirement you didn't narrate the OData standard. Is there a reason the standard is included on one requirement but not the other?</p> <p>A: Florida PALM Project: The OData standard was intended as an example. These standards may change before we execute the contract, which is why we kept some requirements open-ended while others have examples.</p> <p>Q: Eric Larson (AST): I did not see a reference to a data catalog. Is this somewhere else in the requirements? Are we planning on publishing a data catalog with the public-facing API interfaces?</p> <p>A: Florida PALM Project: This isn't covered from an overarching data management aspect. The requirements are not specific so we can get the implementers' viewpoints. Some vendors will have this capability while others will not. This may be part of the integration suite. If you feel this should be a new, discrete requirement, please input this into DecisionDirector.</p> <p>Q: Andrew Gutsch (FDLE): In SDS-037, consider adding compressed files.</p> <p>A: Florida PALM Project: SDS-088 is a separate requirement that addresses compression devices.</p>	
Break	
Requirements Questions & Discussion <i>Support, Operations Management</i>	Eric Adair
<p>Notes for Support Category:</p> <p>Q: Michael McBride (FDOT): EY-95271 mentions a minimum of seven environments. This is a considerable number of environments for us to maintain connectivity. If Florida PALM is staging in seven environments, then agencies have to be able to supporting your testing in seven environments.</p> <p>A: Florida PALM Project: When a newer and bigger system is replacing a legacy system, the moving parts that connect to the system have to be isolated. Your agency may not be connected to all seven environments, just the ones you target for testing. There will be many indications taking place in parallel with the system.</p> <p>Q: Michael McBride (FDOT): FDOT needs to be included in your testing.</p> <p>A: Florida PALM Project: Please input a comment about this in DecisionDirector for later discussion. The importance here is the capability for multiple environments. At this point in time, we don't know if there will be traditional hosted environments. In modern transformation projects, these are environments that can be leveraged so all integration points can be tested before the launch.</p> <p>Q: Michael McBride (FDOT): There is no specific requirement for database logging.</p> <p>A: Florida PALM Project: In the Support category, there is a requirement (SDS1008) for error and event handling.</p> <p>Q: Michael McBride (FDOT): We would need activity logging or database logging.</p> <p>A: Florida PALM Project: If you feel this should be a new requirement, please add this into DecisionDirector.</p> <p>Notes for Operations Management Category:</p>	

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<p>Q: Michael McBride (FDOT): Requirements SDS-191 and SDS-192 seem to be the same thing. We want to make sure the Crystal Reports are not limiting. A: Florida PALM Project: These requirements separate products from services. Templates may be offered as a service.</p>	
<p>Requirements Questions & Discussion <i>Transaction System</i></p>	Eric Adair
<p>Notes: No questions.</p>	
Office Hours	Eric Adair
<p>Notes: Q: Michael McBride (FDOT): If agencies put information into DecisionDirector, do you want those agencies to be available during office hours? A: Florida PALM Project: No. If clarification is needed, Florida PALM will reach out after November 23 when the review period closes.</p> <p>Q: Dawn Edwards (DOE): When will Florida PALM begin negotiation with vendors? A: Florida PALM Project: The ITN is tentatively scheduled for release in spring and the procurement activities are estimated to last a year. Q: Dawn Edwards (DOE): Will the technical and functional coordinators be involved in the negotiation? A: Florida PALM Project: The members of the evaluation and negotiation teams haven't been determined. Q: Michael McBride (FDOT): If an agency wants to serve as an SME during the ITN review should we note this in DecisionDirector? A: Florida PALM Project: Please submit this question to FloridaPALM@myfloridacfo.com.</p> <p>Q: Stephen Hobbs (DEO): There is an interface between FLAIR and the new system. Is this typically a different tool because FLAIR will be shut down? Is this a configuration or customization of the ERP? A: Florida PALM Project: There are a number of requirements providing integration capabilities. These are capabilities that would be leveraged wherever possible. It's not a custom build; it's a toolset, a separate software.</p>	
Meeting Closeout	Julian Gotreaux
<p>Notes:</p> <ul style="list-style-type: none"> Virtual "Office Hours" will be offered next week. Additional details will be emailed to Agency Requirements Review Coordinators. Julian thanked the group and asked that they complete the survey they would receive through SurveyMonkey within the next few days. 	