

## 40.3 Set Up and Maintain Asset Controls

This document is a draft and subject to change

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## Setup and Maintain Asset Controls

### General Information

This document describes and depicts the process steps and supporting information for the identified State business process. Within the *Subprocess Flow Details* section, included for each process step are:

- **Process Step ID** – A unique number assigned to each process step
- **Process Step Title** – A short description assigned to each process step
- **Description of Process** – A detailed narrative description of the process step
- **Ledger Impacts ID** – The number assigned to the documented accounting entry associated with the step

Also described below are the *Ledger Impacts* and *Reports*, which are displayed as icons on the *Business Process Flow Diagrams*. Finally, included in the *Terminology* section are definitions of terms which will help the reader to better understand the document.

### Dependencies and Constraints

- Role-Based Access Control is used to restrict system access to authorized users

### Business Process Overview

Florida PALM Asset Management provides controls to standardize and manage system configuration. Configuration control changes are administered at the State or agency level based on policy, with considerations for the desired level of standardization, ease of maintenance, and impact. Configuration controls include asset templates, relational trees, and asset base configurations. Examples include changes to the capitalization threshold, new or revised asset categories, and new or revised locations.

### Subprocess Flow Details

The table below describes steps in the business subprocess as reflected on the Business Process Flow Diagrams. The table also reflects information associated with each step describing the intent of the specific process.

The Business Process Flow Diagrams use horizontal swim lanes to depict where activities are performed by different parties or systems. Each swim lane is titled with either an agency or an enterprise role. The swim lanes may change from page to page within a single business subprocess as more or fewer roles are required to execute sections of the business subprocess. Optionally, the process flow diagram may reflect vertical swim lanes to further designate information such as systems or time intervals. This process flow depicts requests originating from either agency or State users.

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| <b>Swim Lanes – Definition</b>            | <p><b>Agency Asset Administrator:</b> agency role responsible for updating and maintaining Asset Management configuration values</p> <p><b>DFS Asset Administrator:</b> enterprise role responsible for updating and maintaining Asset Management configuration values</p> |

| Process Step ID | Process Step Title                | Description of Process  |
|-----------------|-----------------------------------|---|
| 1               | Receive Record Add/Update Request | The Agency Asset Administrator receives requests for asset controls configuration from Agency Asset Processors. The DFS Asset Administrator receives requests from DFS Asset Processors, Agency Asset Processors, and Agency Asset Administrators.                                    |
| 2               | Send Request                      | Requests received by the Agency Asset Administrator, that are not administered at the agency level, are sent to the DFS Asset Administrator. Requests received by the State AM Administrator, that are not administered at the DFS level, are sent to the Agency Asset Administrator. |
| 3               | Execute Request                   | The Agency Asset Administrator executes requests that are administered at an agency level (e.g. location profile and localize security). The DFS Asset Administrator executes requests that are administered at the State level (e.g. asset profile).                                 |
| 4               | Notify Requestor                  | The Agency Asset Administrator or the DFS Asset Administrator notifies the requestor when additions or updates are completed.   |

### Ledger Impacts

| Ledger Impact ID | Ledger - Ledger Impact Title | Ledger Impact Description |
|------------------|------------------------------|---------------------------|
| N/A              |                              |                           |

### Reports

| Report Number | Report Description | Report Frequency | Audience |
|---------------|--------------------|------------------|----------|
| N/A           |                    |                  |          |

## Terminology

**Asset Profile ID** – a template that contains standard depreciation criteria for an asset type and its corresponding asset books. The information established in an asset profile can be used as default values when adding assets to the system. Profiles associated with indexes enable replacement cost calculations. Profiles are recommended when handling a large number of assets of the same type. Defining default values minimizes data entry, ensures consistency, and enhances accuracy levels.

**ChartField** – each informational field of the Florida PALM Chart of Accounts (COA), which provide the basic structure to segregate and categorize transactional and budget data.

## Business Process Flow Diagrams

Please see 40.3 Set Up and Maintain Asset Controls located in the [D54 Standardized Business Processes > Working > Workstream B folder](#).

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