**JRO Task Talk**

**Inventory of Reports**

**October 24, 2023**

**Background**

Florida PALM is a business transformation that will affect all State of Florida Agencies people, processes, and technologies (systems). At the core of those is the data used or produced to support our agency’s business operations and reporting needs. Understanding and documenting reports containing FLAIR data is critical for a successful transition to Florida PALM. These reports include what our agency produces and consumes.

For the purposes of the Inventory of Reports project, “reports” can include information formatted for printing or publishing, data queries and extracts, or online inquiries.

Note: ALL FLAIR reports and data queries and extracts will change when PALM is implemented in January 2026.

**Suggested Project**

We are suggesting that each JRO compile a list of reports (using the definition above) that you either receive from the JAC or FLAIR or that you produce for an internal customer. A sample of information to capture regarding each report is at the end of this document. Think about:

1. pdf reports the JAC sends you regularly
2. FLAIR data downloads that the JAC sends you regularly
3. FLAIR information you access by yourself (will be just a few JROs.)
4. Reports you produce for yourself or for a manager

This information will be for your use only. We are not requesting that you send us your list of documents. Please retain your list in your office. Soon, other projects will be suggested for which you will need this inventory.

Suggested data to capture about each FLAIR report that you currently use:

1. Report Name
2. Report ID (optional)
3. Description of what data the report contains - (Example - “detailed payroll data” or “monthly expenditure data.”)
4. Purpose/Requirement – (Example – “this information is used to compile monthly payroll projections” or “used to brief management on monthly expenditures.”)
5. Criticality – specify when you must have a replacement report. Suggested critically could include:
	1. At “Go-Live”
	2. Within 30 days of “Go-Live”
	3. By fiscal year end
	4. Within 180 days of “Go-Live”
6. Key Users/Creators of the report
7. Frequency – how often do you get report or query or how often you create an internal report. Suggested frequency could include:
	1. Weekly
	2. Monthly
	3. Quarterly
	4. Annual
	5. Ad Hoc
8. Source – for FLAIR data and reports, how do you get the report or information. Suggested sources could include:
	1. Report sent by JAC
	2. Data sent by JAC
	3. Download directly from FLAIR (selected JROs only)