

## Task Instructions

**Task ID:** 536-B

**Task Name:** *Create Agency Specific User Acceptance Plan*

**Task Start Date:** *August 19, 2024*

**Task Due Date:** *October 11, 2024*

**Project Impact:** *Indirect*

## Task Description

Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes.

**536-B:** Identify key components of test execution including test management.

## Task Overview

User Acceptance Testing (UAT) will provide the opportunity to complete end-to-end testing of your agency business processes within the Florida PALM testing environment. UAT ensures that agency change impacts to people, processes, technology, and data have been addressed and verified to allow for a successful transition to Florida PALM at go-live in January 2026.

As described in the [UAT Approach](#), all agencies are expected to participate in UAT beginning in April 2025 to prepare for the next major of Florida PALM, which includes implementation of Financials and Payroll Wave and Data Warehouse/Business Intelligence. Given the magnitude of change to be tested and validated and the expectation that all end users are to practice in UAT prior to go-live, agencies will need to develop and execute an agency-specific UAT plan. The objective of a UAT Plan is to document your agency’s approach, key activities, and essential resources needed to prepare for and complete UAT.

This task (Task 536) has been separated into three manageable subtasks to allow your agency to gather, add, or update information within your UAT plan as it becomes available through the completion of other readiness tasks or receipt of Project information.

*Table 1: RW Subtasks*

Subtask	Subtask Planning Objectives	Planned Dates
536-A	536-A will require agencies to establish their testing objectives, scope, key activities and their agency roles and responsibilities.	Jun. 17, 2024 – Aug. 16, 2024
536-B	536-B will require agencies to identify key components of test execution including test management.	Aug. 19, 2024 – Oct. 11, 2024
536-C	536-C will require agencies to confirm their business processes to be tested and identify UAT success criteria.	Oct. 14, 2024 – Dec. 13, 2024

## Subtask B Task Elements

This subtask contains three parts:

1. Review the updated UAT Approach
2. Continue developing your UAT Plan, with the addition of the following:
  - a. Testing Participants
  - b. Logistics of Agency-Led UAT Sessions
  - c. Materials that the agency will need to develop
  - d. Management of testing data
  - e. How the agency will track testing progress

- f. Management of testing errors
- g. Testing coordination and critical roles
3. Continue to log your UAT questions

### *Review the UAT Approach*

The UAT Approach has been updated to include expectations of the Project and agencies during the execution of UAT. Successful test execution will require significant planning and commitment from your agency.

Upon your review of the updated approach, you should review your questions previously logged in the UAT Planning question log. Update the related questions in the question log if the additional information included in the updated UAT Approach provides the answers.

### *Continue Developing your UAT Plan*

The UAT Plan template has been updated to support the development of your plan. The following are the components of your UAT Plan that should be documented with this subtask.

#### **Testing Participants**

Agencies must identify and prepare their testing participants for their roles. As described in the UAT Approach, agency SMEs will first participate in UAT Project-Hosted session and then those SMEs are expected to facilitate testing with agency end users.

Review and confirm your agency SMEs for each Business Process Grouping. Consider the following questions when determining if you have the right people identified for this role.

- *Is this person a business expert for my agency's current operations process?*
- *Does this person understand Florida PALM functionality and the related change impacts for our agency?*
- *Is this person already involved in Florida PALM readiness activities?*
- *Is this person a leader with the authority to speak for our agency during UAT sessions?*
- *Is this person able and have the capacity to lead UAT sessions with our end users?*

All agency end users are expected to participate in End User Testing. Agencies should include in their plan the estimated number of end users per business process grouping.

**NOTE:** *Agencies should be maintaining their SMEs and future Florida PALM end user list within the respective worksheets in Smartsheet.*

#### **Testing Logistics**

In July 2025, when UAT activities are expanded to Agency-Led Expanded End User Testing, agencies will be responsible for providing, managing, and tracking UAT activities. Agencies must determine and plan for providing these testing activities. The questions below may assist agencies in developing their plan.

- *Where are all our end users located?*
- *How should testing be facilitated – in person or virtually?*
- *Do we need to identify and reserve physical testing locations?*
- *Which agency business systems should be included, if any?*

- *Should all end users enter UAT at the same time or should there be a focused effort with managers of end users first?*
- *What will the testing schedule be from July – September?*
- *Are there competing priorities at the same time as UAT? How will those be managed?*
- *How will we ensure that end users have the time and ability to participate in UAT and training during this time?*
- *How will we coordinate and maintain communications across all agency stakeholders?*

### **Testing Materials**

In addition to Project provided testing materials, agencies must create user stories, documenting all business processes that must be tested. In addition to user stories, agencies may need to create additional agency-specific materials to support end user testing activities such as crosswalks of new Chart of Account values and agency-specific configurations (e.g., SpeedKeys).

Agencies are expected to perform their work in UAT. In order to do so, agencies must save sample transactions (e.g., invoices, deposits, transfers) from the period of January to March 2025.

In your UAT Plan, identify the materials that your agency will need to create and provide to your end users to be successful, the individuals responsible for creating the materials, and the expected timeframe when the materials will be developed.

### **Testing Data**

In order to complete testing successfully, end users must have access to valid and accurate data. Agencies must test and validate configuration and conversion data and that the end users have access to the data they need, based on role assignment. Agencies will find data errors or role assignment errors during testing that will require the agency to take action.

In your UAT plan, describe your approach to:

- confirming your agency data is valid and accurate,
- confirming all end users have access to data needed to complete all business processes, and
- Tracking data related issues and resolution of those issues.

### **Tracking and Reporting Testing Progress**

Agencies must track their UAT progress and report progress to the Project on a recurring basis. In your plan, describe how your agency will track progress for internal reporting and reporting to the Project. Include the critical components of what needs to be tracked, the individual(s) responsible, and the plan for communicating progress within your agency.

### **Testing Error Management**

All testing errors should be reported to the agency Testing Triage Team before being reported to the Project. In your plan, document:

- The role of the Testing Triage Team,
- criteria the team will use to determine which errors should be resolved within the agency and which require a ticket to be logged in Service Now , and
- how internal testing errors will be logged, tracked and resolved.

### **Testing Coordination**

UAT execution will require a significant commitment of time for several critical roles. Identity who in your agency will be serving in each of their roles. Document the risks of not having dedicated resources in the critical test execution roles.

### Log UAT Questions

Given the timing and iterative nature of this task, you will likely have questions about UAT that will need to be addressed to fully complete your UAT Plan. Continue using the UAT Planning Questions log to document your outstanding questions for future reference. You will be able to answer your questions as additional information is released from the Project and as you complete future RW tasks or subtasks.

Row ID	Requestor	Question Topic	Question	Status	Comments
001	Jane Doe	Timeline	When will all end users be able to access UAT?	Open	

Figure 1: UAT Question Log

**NOTE:** This question log serves as a repository of questions for you to revisit as you update your UAT Plan in future tasks. The Project Team will not be directly providing responses for your logged questions.

## How will agencies use this information?

Your specific UAT plan is critical to ensure agencies are ready to successfully participate in UAT. This is the second step of a multi-step task to develop a thorough agency specific UAT plan. Agencies will continue to build upon this plan with subtask 536-C.

Your UAT Plan will be used to inform the following future tasks:

- 579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants
- 574 – Prepare Documentation for User Acceptance Testing

Additionally, the completion of your agency specific UAT plan is directly correlated to agency UAT readiness criteria. RW Task 539 – Update Agency Readiness Certification Criteria in March 2025 will require agencies to certify readiness to participate in UAT.

### Tips:

- *Activities from your Agency Specific UAT Plan should be included in your Agency Specific Implementation Schedule (Tasks 539 and 552).*
- *Agency-specific UAT preparation activities or identified risks and issues related to the planning and execution of UAT should be reported in your Bimonthly Agency Readiness Status Reports*

## What will the Florida PALM Team do with this information?

The Project team will review your UAT Plan and Question Log to facilitate conversations about your agency’s UAT approach with your CCN.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 2: Task Completion Rubric

Task Completion Rubric
Agency's updated UAT Plan is attached to task 536-B within your Readiness Workplan Task Tracker.
Drafts within the following sections of your updated Agency UAT Plan have been completed: <ul style="list-style-type: none"> <li>• Testing Participants</li> <li>• Testing Logistics</li> <li>• Testing Materials</li> <li>• Testing Data</li> <li>• Tracking and Reporting Testing Progress</li> <li>• Testing Error Management</li> <li>• Testing Coordination</li> </ul>
UAT questions have been logged in Smartsheet. (Note: If you have not identified agency questions related to UAT planning, enter N/A in the next black row of the UAT Question Log.)
The Task Tracker has been marked as 100% complete for this task.

## Task Instructions

Continue developing your Agency's UAT Plan through collaboration with key stakeholders and your agency's CCN. Complete the required sections. As you discover questions about UAT that your agency needs to get answered, log them in your UAT Question Log. Attach your Agency's UAT Plan in your Readiness Workplan Task tracker to review as UAT tasks start being released.

### Smartsheet Navigation:

- Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) UAT Planning Questions
- Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) Readiness Workplan Task Tracker

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 3 above.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Review the updated UAT Approach.
2) Collaborate with your Change Champion Network and key stakeholders to continue drafting your Agency UAT Plan.
3) Log your UAT related questions in Smartsheet.
4) Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.
5) Complete task by <b>October 11, 2024</b> .
6) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.

**Summary of Task Completion Steps**

7) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

**Supporting Materials & Resources:**

- Updated [UAT Approach](#)
- Updated [UAT Plan Template](#)