Overview

Training will be designed, built, and delivered to prepare end users to work in Florida PALM at the Financials and Payroll Wave go-live. Training will incorporate the concepts of "Read It, Watch It, Do It" to support end user learning. End users will become familiar with Florida PALM functions and activities as they:

- **Read It** – Learn about Florida PALM from online materials.
- **Watch It** – Observe how transactions are completed in Florida PALM.
- **Do It** – Complete testing and practice transactions during UAT and training.
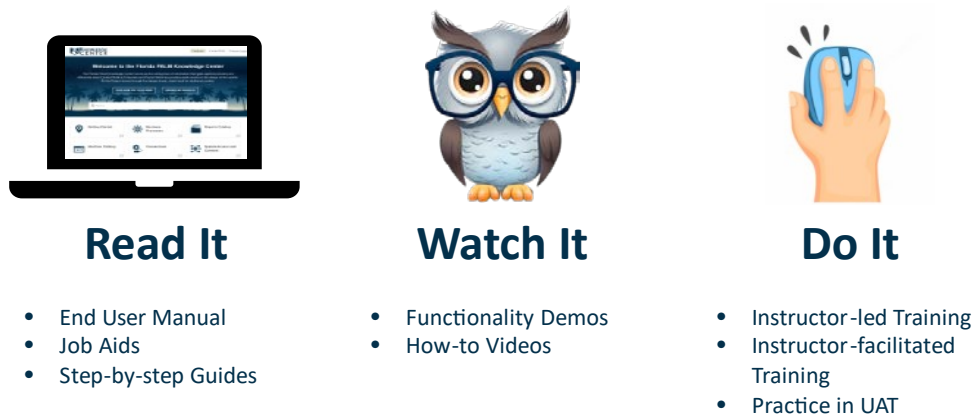

Read It
- End User Manual
- Job Aids
- Step-by-step Guides

Watch It
- Functionality Demos
- How-to Videos

Do It
- Instructor-led Training
- Instructor-facilitated Training
- Practice in UAT

Figure 1: Read It, Watch It, Do It

Training development and delivery is a shared responsibility of the Project and agencies. The Project will provide various training methods incorporating Read It, Watch It, Do It methodologies, including web-based training (WBT) (e.g., self-guided learning and videos), and written materials (e.g., step-by-step guides, job aids, and an End User Manual), and where appropriate, instructor-led training (ILT) or instructor-facilitated training (IFT). Agencies are responsible for supporting their end user learning by developing and delivering agency-specific training and learning materials.

End users will have their first opportunity to work in the Financials and Payroll Wave functionality of Florida PALM when they participate in User Acceptance Testing (UAT). Before participating in Project-hosted UAT sessions, end users must complete prerequisite training to become familiar with working in the system. The Project will provide UAT prerequisite training materials, covering topics such as navigating within the system, customizing home pages, and identifying required fields. Following the required pre-training, end users will have access to business function-specific training materials, including screenshots and process steps, to complete activities within Florida PALM. These materials will assist users in completing the steps necessary to test transactions in the system to complete their work activities.

Agencies are expected to begin delivering agency-specific training after Project-provided training begins. Agency end users should use the UAT environment until go-live to practice job functions and reinforce learning. Development, refinement, and delivery of both Project-provided and agency-specific training will continue through go-live with continued support through Project Hosted User Support Sessions and agency support of end users after go-live.

Once developed, the End User Manual (Manual) will be used initially as a reference for training materials during UAT activities and end user training. The Manual, in support of pre and post go-live end user learning, will provide comprehensive guidance to understand the capabilities of Florida PALM and how to complete transactions. Post go-live, end users will have continued access to information, via the Florida PALM Knowledge Center, and the ability to practice their skills within Florida PALM through the Sandbox environment, using the Manual as a reference.

Florida PALM Training Activities

The goal of the training activities is to prepare agency end users to use Florida PALM to support their business and reporting processes. The Florida PALM Training, Education and Development (TED) Team will design and create training materials and provide training using a variety of learning methods. Florida PALM-specific training will be developed in or using the Training environment, which will include generic security roles and configurations not specific to any agency or end user.

Training materials will include those that will:
- support self-study and will be published via a learning management system (LMS) (e.g., People First) or the Florida PALM Knowledge Center,
- provide performance support (e.g., infographics, job aids, videos), and
- support ILT or IFT through in-person training delivery, where appropriate.

Training delivery methods will be determined based on the complexity of the training topic. The TED Team will collaborate with the Florida PALM Functional, Technical, and Reporting Team members to determine which training topics should be designated for ILT or IFT. Topics with a level of complexity that require additional attention to design and delivery (e.g., messaging, reinforcement) may be designated as ILT. Training topics identified as requiring additional support for end users to better understand Florida PALM may be designated as IFT and supported in a workshop-style content delivery.

After surveying agencies regarding their interest in participating in a Train-the-Trainer program it was determined the need for this type of program for the Financials and Payroll Waves is not necessary. Agencies will have access to numerous end user learning opportunities beginning with UAT and continuing through go-live, providing exposure to hands-on learning, using agency information and values to complete activities. Additionally, training will be conducted in tandem with UAT, providing a unique learning experience for end users to reinforce what they learn through UAT and become comfortable working in the system prior to go-live. End users will have access to a variety of training materials prior to go-live so they can have a hand in guiding the amount of learning needed to ensure a successful transition to Florida PALM.

The TED Team will collaborate with the Department of Financial Services (DFS), Office of Florida Financial Education (OFFE) to share information needed to deliver quality training to the Division of Accounting and Auditing (A&A) enterprise end users. With the support of the Project's Functional, Technical and Reporting Teams, OFFE will prepare enterprise-related training and materials for A&A staff.

After go-live, the Florida PALM Project will provide hypercare, post-implementation support, and assistance to agencies. Support may be statewide or agency-focused, depending on the needs of the agencies. The Project (i.e., TED, Readiness, Functional, Technical, and Reporting Teams)

will provide user support sessions to reinforce end users' understanding and use of Florida PALM, address any process changes, respond to end user feedback, and provide additional help, as requested. Further, end users can contact the Florida PALM Solution Center for additional assistance or use the Knowledge Center for self-service access to additional information.

Table 1 provides a summary explanation of the activities to plan, design, create, review, and deliver training. As noted in the descriptions, activities will be performed by the Project with agency participation. Additional information on training activities will be shared through Change Champion Network activities, such as Town Hall meetings, recurring Touchpoints and Readiness Workplan (RW) tasks.

Table 1: Project-led Training Activities

Activity	Description
Training Curriculum Creation	The Project will create an outline of planned training topics and content to be designed and built to train and support end users in the use of Florida PALM.
UAT Training Materials Creation	The Project will create UAT training materials to prepare identified users for how to navigate in, interact with, and complete processes within the Florida PALM UAT environment. This will provide end users with the chance to experience hands-on sessions to complete transactions.
Training Materials Creation	The Project will create additional materials, building upon the UAT training materials, to provide training for Florida PALM based on the training curriculum (e.g., step-by-step guides, job aids, videos).
End User Manual Creation	The Project will create an online, searchable manual within the Knowledge Center that will incorporate the materials from UAT and training.
Instructor-led Training (ILT)	Project trainers will guide participants through the training material, provide explanations, answer questions, and engage learners in activities and discussions to enhance understanding on specific Florida PALM functionality or process.
Instructor-facilitated Training (IFT)	Project trainers will guide participants through targeted activities, discussions, and exercises designed to promote learning and understanding on Florida PALM functionality or process.
End User Training Delivery and User Support Sessions	Agency end users will participate in Florida PALM end user training up to go-live. User Support Sessions will be available to receive support after go-live.

Agency-Specific Training Activities

Agency involvement in training preparation and delivery is critical to successful learning for their end users. Agencies will determine the best way to communicate and provide agency-specific training focused on understanding and applying the Florida PALM business processes and agency-specific values (e.g., ChartField values) their end users will use.

There are six critical sets of activities agencies will need to complete to ready their end users for Florida PALM, as shown in Figure 2.
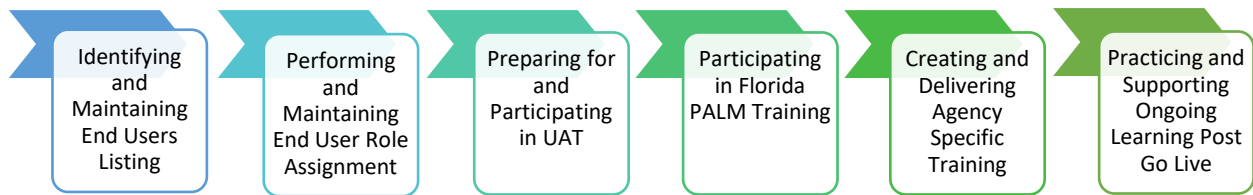
Identifying and Maintaining End Users Listing	Performing and Maintaining End User Role Assignment	Preparing for and Participating in UAT	Participating in Florida PALM Training	Creating and Delivering Agency Specific Training	Practicing and Supporting Ongoing Learning Post Go Live

Figure 2: Agency Training Preparation and Support

Identifying and Maintaining End User Listing

Agencies cannot successfully transition to Florida PALM if their end users are not ready. The first step to ensuring agency readiness is to identify a comprehensive list of all end users expected to use Florida PALM at go-live and align the end users to their applicable Business Process Grouping or functional/topic areas. From this listing, agencies will know who will participate in UAT and be required to complete training activities.

Related RW tasks:

- RW Task 512 – Identify Future Florida PALM End Users
- RW Task 564 – Update Future Florida PALM End Users

Performing and Maintaining End User Role Assignment

Florida PALM is a role-based system in which users are assigned end user roles to perform transactions associated with completing their work. Once agencies have identified all end users, they will need to determine what role is associated with each end user's work activities. Once roles are established and assigned, agencies may confirm which UAT sessions and training each end user should participate in.

Related RW task:

- RW Task 573 – Complete and Submit End User Role Mapping Worksheet

Preparing for and Participating in UAT

Once users have been identified and mapped to their roles, they will prepare to attend and participate in UAT, their first opportunity to work in an environment that will mirror Florida PALM at go-live. Agencies will identify Subject Matter Experts (SMEs) to participate in Florida PALM UAT sessions where they will receive training materials to successfully perform in UAT and test the system using their planned implementation business processes and agency-specific data values.

After participating in Project-hosted UAT sessions, agency SMEs will then facilitate agency-hosted UAT sessions for all end users to test, using their agency-specific values. All end users are expected to participate in agency-hosted UAT sessions and will have access to the Project's UAT training materials through the Knowledge Center. Agencies will also need to create their own materials to support the testing of their business processes, business systems, and agency data. Certification of agency readiness of the four critical operational elements (People, Processes, Technology, and Data) is supported by the agency's efforts during UAT.

Related RW tasks:

- RW Task 536 – Create Agency Specific User Acceptance Testing Plan

- RW Task 579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants
- RW Task 596 – Participate in UAT

Participating in Florida PALM Training

While agencies are participating in UAT, getting a chance to work in and learn how to complete transactions in the system, the Project will also provide more traditional learning activities. In addition to providing UAT training materials, Project created training materials will be developed using various methods to meet the needs of the end users (e.g., WBT, ILT, IFT, job aids and videos) and will provide end users the opportunity to "Read It, Watch It, Do It" when learning new functionality.

Related RW tasks:
- RW Task 601 – Register for Florida PALM Training
- RW Task 613 – Participate in Florida PALM Training

Creating and Delivering Agency-Specific Training

The Project will provide training to end users on system functionality and how to work in Florida PALM. It is the agency's responsibility to develop and deliver training on:
- agency-specific policies and procedures,
- understanding and applying the Florida PALM business processes, and
- agency-specific values (e.g., ChartField values).

Agencies will determine the best way to communicate and provide agency-specific training. The UAT environment can be used by agencies to develop agency-specific training materials and reinforce end user learning by practicing work activities. This practice will increase end users' level of comfort and familiarity with completing transactions, leading to a smoother transition at go-live. Adjustments to agency-specific training may be made based on participation in UAT. Potential agency-specific training topics may include:
- agency adoption of the Florida PALM business processes,
- use of ChartFields and agency values, and
- updated agency process and procedure documentation.

Related RW tasks:
- RW Task 568 – Create Training Plan for Agency Managed End User Training
- RW Task 607 – Update Training Plan
- RW Task 625 – Conduct Agency Specific Training
- RW Task 631 – Require End User Practice

Practicing and Supporting Ongoing Learning Post Go-Live

Post-implementation, ongoing support is critical to the success of agency end users performing their job duties. Agencies will be able to continue learning sessions following go-live by:
- practicing job functions,
- testing new processes in the Sandbox before trying in Production, and
- using the online End User Manual to identify process steps or training tips to complete transactions within Florida PALM.

Agencies should plan to host agency-specific end user support sessions following go-live, should they need additional support.

Related RW tasks:

- RW Task 639, 644, 647 – Post Implementation: Conduct Agency End User Support Sessions
- RW Task 641 – Post Implementation: Require End User Practice in Florida PALM Sandbox
- RW Task 643, 646 – Post Implementation: Attend Florida PALM Hosted Help Sessions

Agency Roles and Responsibilities

Within each agency there are several roles that play a part in successful training. Table 2 lists the roles and describes the various responsibilities of each.

Table 1: Agency Training Roles and Responsibilities

Role	Responsibility
Training Liaison	• Identify and track agency UAT and training participants. • Support agency-hosted UAT and training sessions with end users. • Coordinate or lead the agency-specific training material development.
Subject Matter Experts (Assigned per Business Process Grouping)	• Participate as first end users in UAT. • Conduct agency-hosted UAT session with end users. • Serve as primary point of contact for end user business process, data, and technical questions. • Support agency training material development. • Support end user understanding during UAT and after go-live.
End Users	• Practice related job processes. • Participate in individual and group training sessions.