

User Acceptance Testing Approach

Overview

All agencies are expected to participate in User Acceptance Testing (UAT) beginning in April 2025 to prepare for the next major implementation of Florida PALM in January 2026. UAT will include testing for the next major implementation which includes Financials Wave, Payroll Wave, and the Data Warehouse/Business Intelligence (DW/BI). Agencies will use UAT to:

- Test and validate:
 - all updated agency business processes from end-to-end, including processes that integrate with their agency business systems and other enterprise systems (People First, MFMP, etc.);
 - business system remediation (where applicable);
 - end user role assignments;
 - agency specific configurations; and
 - reporting needs and solutions.
- Develop agency-specific end user training and education materials.
- Provide all end users exposure to and practice in Florida PALM.
- Confirm agency change impacts to people, processes, technology and data.

With the approval of the Florida PALM Executive Steering Committee (ESC) of Stage Gate #3 – Ready to Begin UAT in March 2025, there will be a controlled roll out and ramp up of UAT activities for agencies, beginning in April 2025. UAT will begin with several months of project-hosted sessions where agency-identified Subject Matter Experts (SMEs) will attend in-person session(s) based on business process / grouping and end user role. Following these sessions, participating agency SMEs will be expected to conduct their own agency hosted UAT sessions with agency end users. These agency sessions should occur as part of the agency's overall training and readiness approach.

Full integration testing for agencies will begin in July 2025. This is when agencies will test all their processes from comprehensive, end-to-end, including the integration of necessary agency business systems and enterprise systems.

Completion of UAT activities will be part of the [Agency Readiness Certification](#) and will support the agency and Project information provided to the ESC in support of Stage Gate #4 – Agency Readiness decision. The purpose of Stage Gate #4 is to confirm agencies have completed UAT and the criterion for approval is that Agency Readiness Certifications have been received. The four planned Agency Readiness Certifications will include Agency Sponsor assertion of the progressive completion of readiness activities, culminating with the final Certification in November 2025, aligning with the conclusion of agency UAT participation.

Project UAT Responsibilities

The UAT effort includes independent and coordinated testing activities between the Florida PALM Project (Project), enterprise partners (entities and systems) and agencies. The Project will complete the following to support agency UAT activities:

- Initial load of SMEs and role assignments prior to the start of UAT.

- Initial load of agency-specific configuration values, as confirmed by agencies.
- Initial load of agency conversion data, based on Mock Conversion 3.
- Create access to the UAT environment for participating SMEs with an agency assigned role.
- Host UAT sessions for SMEs.
- Provide training materials (navigation, process steps) to support SME and end user UAT activities.
- Implement a process through ServiceNow (SNow) for agency UAT participants to log and track testing errors.
- Provide support during testing activities.

Through the Readiness Workplan (RW) tasks, the Project will provide additional information, instruction, and materials.

Agency UAT Planning

Agencies will develop an agency specific UAT plan to document their approach, key activities, and essential resources needed to complete UAT. Agencies will develop their plan through a series of three RW subtasks associated with RW Task 536 – Create Agency Specific User Acceptance Testing Plan. Table 1 lists each subtask, objectives and dates for each.

Table 1: UAT Plan 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.	June 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 to identify UAT success criteria.	Dec. 9, 2024 – Jan. 31, 2025

In addition to the UAT Plan preparation activities, agencies will also complete RW tasks focused on preparing documentation and participants for UAT. Figure 1 shows the RW tasks focused on preparing agencies for UAT, culminating with Agency Readiness Certification #1 in March 2025.

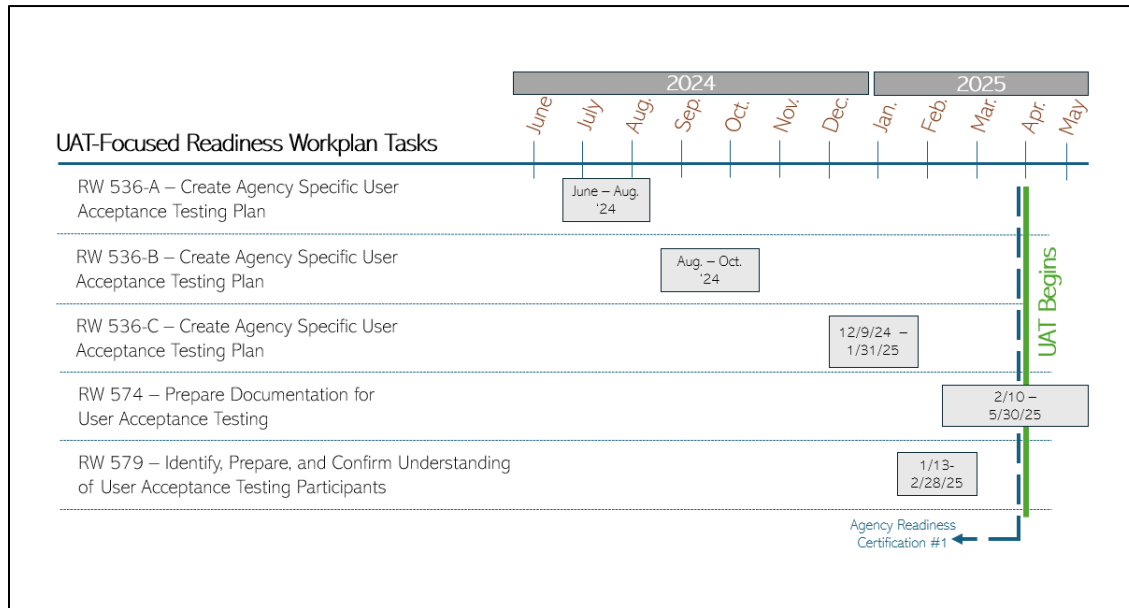


Figure 1: UAT Preparation RW Tasks

Agency Preparation for UAT

Agency preparation for UAT includes readying their four critical operational elements: people, processes, technology, and data. Agencies will be asked to confirm their readiness to begin UAT in March 2025 and readiness to begin full integration testing in June 2025. Agency UAT readiness criteria and related RW tasks are provided in Table 2.

Table 2: UAT Readiness Criteria

Critical Operational Element	Readiness Criteria <i>Update 1: Begin UAT</i>	Related RW Tasks
People	<ul style="list-style-type: none"> Agency identified SMEs have been assigned end user roles based on job functions. UAT Roles and Responsibilities have been identified in agency-specific UAT Plan. SMEs have been identified and prepared to participate in UAT. 	<ul style="list-style-type: none"> 536 – Create Agency-Specific User Acceptance Testing Plan 573 – Complete and Submit End User Role Mapping Worksheet 579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants 585 – Update Workforce Readiness Plan
Processes	<ul style="list-style-type: none"> Change impacts have been identified for agency processes. All UAT scenarios have been identified 	<ul style="list-style-type: none"> 536 – Create Agency-Specific User Acceptance Testing Plan 560 – Submit Change Analysis Tool
Technology	<ul style="list-style-type: none"> Agency interface needs have been confirmed. 	<ul style="list-style-type: none"> 557 – Confirm Interface Inventory Cycle 2 Interface Testing

Critical Operational Element	Readiness Criteria <i>Update 1: Begin UAT</i>	Related RW Tasks
	<ul style="list-style-type: none"> Agency business system remediation for Tier 1 systems is at least 50% complete. Agency business system testing environments have been established and are ready to begin technical interface testing with Florida PALM. Agency IDP has been confirmed, and configuration with the Florida PALM UAT environment is in on track to be complete before the start of UAT. Agency SME end users have been added to the agency's IDP for the Florida PALM UAT environment. 	<ul style="list-style-type: none"> 566 - Validate Detailed Cycle 2 Interface Testing Information 577 – Remediate Agency Business Systems and Update Documentation 578 – Confirm Identity Provider for Florida PALM 591 – Confirm IDP Configuration for Florida PALM 592 – Agency IDP SMEs Add Identified User Acceptance Testing Participants to Agency's Identity Provider
Data	<ul style="list-style-type: none"> Agency has documented reporting needs. Agency specific configurations have been confirmed. Agency data is cleansed based on Mock Conversion 2 results. 	<ul style="list-style-type: none"> 560 – Submit Change Analysis Tool 567 – Share, Review, and Update Configuration Workbooks 571 – Complete Data Cleansing Based on Mock Conversion 2 574 – Prepare Documentation for User Acceptance Testing

As UAT expands to full integration testing in July 2025, incorporating end-to-end testing with agency business systems and enterprise systems, agencies will need to confirm additional readiness criteria to continue UAT as identified in Table 3.

Table 3: Full Integration Testing Readiness Criteria

Critical Operational Element	Readiness Criteria <i>Update 2: Continue UAT and Begin Project-Led Training</i>	Related RW Tasks
People	<ul style="list-style-type: none"> Agency specific training plan is completed. Agency end users have been assigned end user roles based on job functions. All agency SMEs have participated in Project-led UAT sessions, or agency has a plan to engage remaining SMEs in Agency-specific testing activities. 	<ul style="list-style-type: none"> 568 – Create Training Plan for Agency Managed End User Training 573 – Complete and Submit End User Role Mapping Worksheet 595 – Complete and Submit End User Readiness Survey Analysis 596 – Participate in User Acceptance Testing 601 – Register for Florida PALM Training

Critical Operational Element	Readiness Criteria <i>Update 2: Continue UAT and Begin Project-Led Training</i>	Related RW Tasks
	<ul style="list-style-type: none"> End users have begun to register for Florida PALM training. Changes to end user role assignments are being documented, as needed. 	
Processes	<ul style="list-style-type: none"> Agency-specific testing materials including user stories end-to-end processing have been developed. Some processes have been tested in UAT. Process documentation updates have started based on testing results and access to UAT environment. 	<ul style="list-style-type: none"> 574 – Prepare Documentation for User Acceptance Testing 596 – Participate in User Acceptance Testing 602 - Update Agency Business Process Documentation
Technology	<ul style="list-style-type: none"> Technical interface testing successfully completed. Agency business system documentation is fully updated, or the agency has a plan to complete prior to conducting end-to-end integration testing in July 2025. Agency business system remediation and internal testing is complete. Agency business system testing environments are ready for end-to-end integration testing. Test scripts for end-to-end integration testing have been developed. 	<ul style="list-style-type: none"> 575 – Complete Cycle 2 - Technical Interface Testing 576 – Complete Internal Agency Business System Test 577 – Remediate Agency Business Systems and Update Documentation 596 – Participate in User Acceptance Testing 609 – Confirm Ready for Full Integration Testing
Data	<ul style="list-style-type: none"> Agency test data has been identified. Changes to agency specific configurations have been documented and provided to the Project, if applicable. Agency data is cleansed based on Mock Conversion 3 and Mock Conversion 4 results. Florida PALM provided reports have been tested and validated. 	<ul style="list-style-type: none"> 574 – Prepare Documentation for User Acceptance Testing 587 – Complete Data Cleansing Based on Conversion 3 596 – Participate in User Acceptance Testing 597 – Complete Data Cleansing Based on Mock Conversion 4 657 - Submit Updated Configuration Workbooks

Agency Roles and Responsibilities

The agency CCN will generally coordinate the UAT efforts within the agency, though there are some specific, time-bound roles that will be assigned to support UAT efforts for the duration of the UAT period. Table 4 lists the roles and describes the various responsibilities of each.

Table 4: Agency UAT Roles and Responsibilities

Role	Responsibility
Agency Sponsor	<ul style="list-style-type: none"> • Certify readiness to participate in UAT. • Regularly monitor agency UAT progress. • Monitor agency risks, issues, and mitigation plans and communicate them to the Project. • Request, provide and assign appropriate resources as needed, and remove obstacles to successfully complete UAT activities.
Agency Liaison	<ul style="list-style-type: none"> • Collaborate closely with UAT Coordinator and provide updates to the Agency Sponsor. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Business Liaison	<ul style="list-style-type: none"> • Identify and confirm all agency business processes to be tested. • Confirm the creation of User Stories and updated documentation for processes and procedures. • Ensure that end-to-end testing of agency business processes is conducted. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Technical Liaison	<ul style="list-style-type: none"> • Identify and confirm all agency business systems to be tested. • Confirm agency business systems are ready for full integration testing. • Coordinate agency business system remediation as needed, based on the results of testing. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Project Management Liaison	<ul style="list-style-type: none"> • Capture and track both Project- and internal agency-driven UAT activities and maintain awareness of progress and due dates. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Change Management Liaison	<ul style="list-style-type: none"> • Develop and maintain UAT communication plan. • Support the identification and tracking of agency UAT participants. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Training Liaison	<ul style="list-style-type: none"> • Identify and track agency UAT participants. • Support agency hosted UAT sessions with end users. • Coordinate or lead the agency training material development.

Role	Responsibility
	<ul style="list-style-type: none"> Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
UAT Coordinator	<ul style="list-style-type: none"> Track and confirm testing progress. Lead the Testing Error Triage Team. Serve as the primary point of contact with the Florida PALM Project team for reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline.
Testing Error Triage Team	<ul style="list-style-type: none"> Meet regularly to review progress and discuss upcoming activities. Review testing errors to determine resolution or need for escalation.
Subject Matter Experts <i>(Assigned per Business Process Grouping)</i>	<ul style="list-style-type: none"> Support UAT planning (e.g., user stories/script development, agency-specific materials development). 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. Report testing errors and testing progress to UAT Coordinator. Support end user understanding during UAT and after go-live. Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Security Access Manager	<ul style="list-style-type: none"> Perform and track role assignment changes for SMEs and end users during UAT. Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.
Identity Provider Subject Matter Expert	<ul style="list-style-type: none"> Add end users to the active directory (or applicable tool) for access to UAT. Maintain active directory for access throughout UAT (adding new end users or removing end users as needed).
File Manager	<ul style="list-style-type: none"> Serve as the primary point of contact for interface testing. Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM.
Batch Error Contact	<ul style="list-style-type: none"> Serve as the primary point of contact for batch errors or change in batch process timing.
End Users	<ul style="list-style-type: none"> Practice related job processes. Confirm end user role assignment(s). Report testing errors and testing progress to SME or UAT Coordinator, as appropriate.

User Acceptance Testing Execution

Testing Timeline

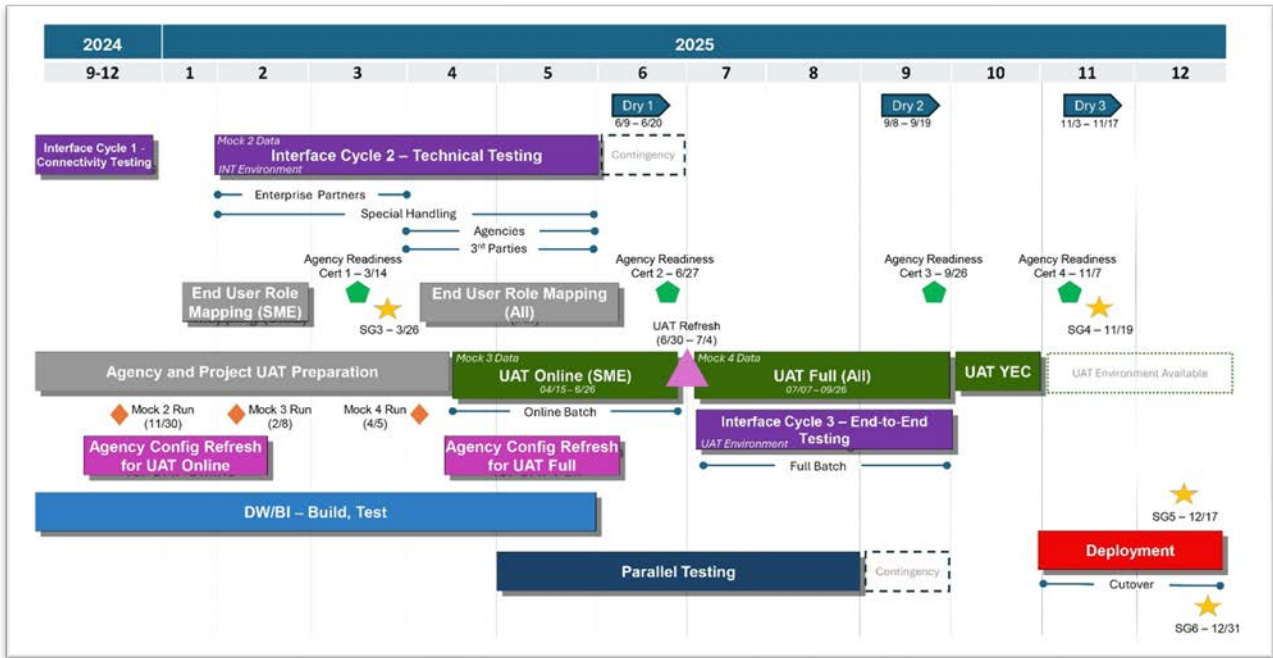


Figure 2: Testing Timeline

As depicted in Figure 2, User Acceptance Testing will be arranged into periods of time and activities that allow for the progression of testing from online to full interface testing, and from a smaller SME group to all impacted end users. UAT will begin with a UAT Kick-Off with all agencies. Following the kick-off, the Project will host guided, in-person UAT sessions with agency SMEs from April 2025 through June 2025. The Project-Hosted SME Testing sessions will be focused on manual entry in Florida PALM (i.e., online transactions) and organized based on business functions.

DFS Enterprise Partner entities (e.g., A&A and Treasury) will support the completion of online processing activities (e.g., executing approvals, denials, request for more information in Florida PALM), reviewing and validating enterprise level reports, and generally completing their daily activities in the test environment in a similar fashion to how they will operate upon implementation in January 2026.

Upon completion of the Project-Hosted SME Testing sessions, agencies must facilitate testing for all agency end users. During Agency-Led Expanded End User Testing agency SMEs will impart their knowledge and understanding of Florida PALM and agency change impacts to their agency end users as facilitators of the agency-led testing activities.

Agency-Led Expanded End User Testing should be executed from July 2025 through September 2025. This is the opportunity for agencies to complete full integration testing. Agencies will use this time to test end-to-end processes with all end users, including the integration of agency business systems and Enterprise Systems (e.g., People First, MFMP, STMS, PCard Works).

Formal UAT activities should wrap up in October 2025. During this month, the Project will provide Project-Hosted SME Testing sessions focused on year-end processes and activities. Additionally, during this month, agencies are expected to finalize and resolve any outstanding testing issues to prepare for submission of the Agency Readiness Certification to support the Agency Readiness Stage Gate decision in November 2025.

Agencies should also use the UAT environment to create agency-specific UAT and training materials. Additionally, agency end users should use the UAT environment to practice job functions and reinforce what has been learned through training. The UAT environment will continue to be available to agencies and their end users until go-live.

Project Responsibilities During Test Execution

During UAT execution, the Project will:

- support agency testing activities by providing in-person and virtual assistance, answering questions, providing process input and overall encouragement to agency testers;
- develop and share testing materials;
- allow agency access to the testing environment; and
- provide the ability for agencies to report and track testing errors.

Testing Materials

The Project will provide basic testing materials during Project-Hosted SME Sessions. The Project UAT materials will continue to be available to agencies and their end users to support Agency-Led UAT sessions. UAT materials provided by the Project will include the steps to complete processes in Florida PALM and how to navigate in Florida PALM. The functions performed through support from Florida PALM are listed in the [Topics and Activities](#) listing. The Project-provided UAT materials will be made available in the Knowledge Center and may also include related screenshots and demonstration videos and will align with the items in the Topics and Activities listing.

Testing Environment

The Project will provide access to the testing environment for all agencies. Prior to the start of Project-Hosted SME Testing (April – June 2025), the Project will load the following into the testing environment:

- all agency SME's and their assigned end user roles, based on the agency's submitted Role Mapping Worksheet (RW Task 573-A);
- configuration data, including statewide and standard configurations and agency-specific configurations as confirmed by agencies (RW Task 576); and
- conversion data from Mock 3 conversion testing, which will be data as of February 2025.

In July 2025, the testing environment will be available for Agency-Led Expanded End User Testing. The Project will:

- work in conjunction with agency SAMs to add all remaining agency end users and provision end user roles based on the agency's submitted Role Mapping Worksheet (RW Task 573-B);
- complete a data refresh of the testing environment with Mock 4 conversion data as of April 2025; and

- update agency-specific configuration values as provided by agencies(RW Task 657), if needed.

Testing Errors and System Enhancements

A critical component of testing execution and management is the ability to report testing errors and track the resolution of reported errors. The Project will use ServiceNow for tracking testing errors. All end users will be able to access SNow and log tickets to request support or log errors. Agencies will be provided with two SNow Business Stakeholder licenses. With those licenses, agencies will have visibility into all tickets that have been logged for their agency, including the status of each ticket. The Project will:

- manage reported testing issues by reviewing submitted tickets daily to prioritize and resolve tickets timely;
- escalate major issues during UAT immediately (i.e., real-time) to ensure blockers are removed quickly; and
- communicate ticket resolution to the ticket originator.

Agency Responsibilities During Test Execution

Managing UAT will require a significant commitment from agencies and must be a coordinated effort across a variety of critical agency roles (UAT Coordinator, SAMs, Triage Team, etc.) and the Project. When conducting UAT, agencies are responsible for:

- Agency Testing Participants - Identifying and preparing agency testers
- Agency-Led UAT Testing Logistics - Managing agency testing logistics, such as securing locations, ensuring participant sign up, obtaining computer resources
- Agency-Specific Testing Materials - Identifying agency-specific testing scenarios and gathering examples and supporting materials
- Agency Testing Data - Validating testing data and tracking data changes
- Progress Tracking and Reporting - Tracking and reporting progress of agency testers and testing efforts
- Testing Errors - Managing and reporting testing errors
- Testing Coordination - Coordinating testing activities, internal and external communication, and changes to agency business systems

Agency Testing Participants

SMEs

Agencies have identified SMEs for business process groupings within their agency. SMEs participating in UAT should be:

- **Business experts** in your agency's current operational process.
- **Aware** of Florida PALM functionality and the related change impacts for your agency.
- **Involved** in Florida PALM readiness activities (attending workshops, participating in internal agency CCN engagements, assisting with completing RW tasks).
- **Leaders** with the authority to speak for your agency during UAT sessions.
- **Advisors** who are able and have the capacity to lead UAT sessions with agency end users.

Agencies should ensure that SMEs are participating in change impact activities and participated in or reviewed the recordings and materials from the Florida PALM Design Recap and Test Preparation Workshops in November 2024. Additional guidance for identification and preparations of agency SMEs for UAT will be provided with RW Task 579 - *Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants* in January 2025.

In addition to being the leaders in UAT and facilitating the Agency-Led Expanded End User Testing, SME's are also expected to support the training efforts within their agency. SMEs should partner with their agency Training Liaison to support the development and delivery of agency-specific training. The [Training Approach](#) provides additional information about Project and agency-specific training.

End Users

Agencies should have all end users identified in their Future Florida PALM End User list (RW task 564) and their Role Mapping worksheet (RW task 573). All end users should participate in UAT, completing user stories to confirm that they can complete their job functions in Florida PALM, including related workflows.

Agency Change Management Liaisons should be working with managers of end users to ensure that end users are aware of UAT and their participation, to discuss process changes that have already been identified and to confirm understanding of testing materials. Awareness activities targeted at agency end users should already be underway. End users need to be aware of the implementation timeline, changes that are coming in how they perform their functions, their role in the testing, and the expectations your agency has for end users to complete training and practicing their functions prior to go live.

UAT and training both provide opportunities for end user learning and building of understanding. Project provided training will begin in July 2025, as end users are beginning to complete testing activities in the UAT environment. Agencies should be prepared to deliver agency-specific end user training beginning no later than October 2025. End users will continue to have access to the User Acceptance Testing environment, which will be configured for your agency (e.g., roles, data, workflow), to practice job functions and reinforce what has been learned through training.

Agency-Led UAT Session Logistics

After Project-Hosted SME Testing, the agency SMEs will facilitate UAT with agency end users. Agencies must plan for and manage Agency-Led Expanded End User Testing. End users participating in testing will be able to log into the UAT environment from their agency workstation.

When planning for Agency-Led Expanded End User Testing sessions, agencies should develop a roll-out plan to ensure all end users are included and all business processes are tested and validated, including those with integrated agency business systems. 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?*

The Project will provide overview materials to help end users be successful in UAT, but agencies may require end users to complete pre-requisites before participating in UAT. They may consider requiring review of change impact or updated process documentation, confirmation of understanding of the Florida PALM chart of accounts structure, or review of demonstration videos in the Knowledge Center.

Agency UAT Communication Strategy

Many agencies will have a large number of testers engaged in UAT. Agencies should develop a communication strategy to plan for and document UAT communications to ensure participants are well-informed of expectations, activities, schedules, available resources, and testing progress. The UAT Coordinator and Change Management Liaison should work together to develop a communication strategy for the agency.

Agency-Specific Testing Materials

Agencies must create user stories for all business processes to be tested. A user story is not a test script, rather it is a description of a single unit of work or activity within a larger business process. It often includes a role, the activity, and the reason for the activity.

Some examples of user stories are:

- As an Accounting Specialist in Disbursements, I want to process a City of Tallahassee utility bill so that we may pay the invoice to meet prompt payment law.
- As an Asset Custodian, I want to update the location of a tagged piece of equipment to reflect the transfer from one assigned user to another.
- As an Accountant III in Revenue, I want to process a transfer of revenues between two of our agency trust funds so the agency can record the receipt of funds into the proper fund.

In addition to developing 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). As agencies are completing their configuration and conversion RW Tasks, they should be thinking about how those changes or resulting data sets should be captured and communicated internally to support end users' UAT experience.

Further guidance for developing agency testing materials will be provided to agencies with the release of RW task 574 – *Prepare Documentation for User Acceptance Testing* in February 2025. However, it's important to note that agency example / sample transactions (e.g., invoices, deposits, transfers) should be sourced from actual agency transactions as of February 2025.

Agency Testing Data

As described above, the Project will load the initial configuration and conversion data, along with SME end user role assignments at the start of UAT. At the start of the Agency-Led Expanded End User Testing in July, the Project will perform a data refresh.

During testing, agencies may identify data issues that require action to be taken for resolution, such as:

- **Configuration updates/changes** – If an agency identifies the need to make a change or provide a new agency-specific configuration value (e.g., Organization ID, OA1, asset location definition), then the agency should make the update in the testing environment following the related Florida PALM process. Agencies must track all configuration changes in their configuration workbook if those changes need to be in Florida PALM after the UAT data refresh or at go live. Changes that are tested, validated, and determined necessary for the UAT refresh will be submitted to the Project in June 2025 (RW Task 657) and in October 2025 (RW Task 622) for go-live.
- **Conversion issues** – If an agency identifies an issue with data that has been converted, the agency should address the issue in the source system (e.g. FLAIR, MFMP). Agencies should update their Agency Data Readiness Plan to include the found issue, the resolution, and plan to maintain data readiness until final conversion just before go-live.
- **End User Role Assignment changes** –
 - If an agency identifies the need to add or remove end users, the agency IDP SME is responsible for making required updates in the agency's active directory.
 - If an agency identifies the need to make role assignment changes, those changes must be performed by the agency SAM.
 - All changes that are tested, verified, and determined to be needed at go-live should be documented in the agency's Role Mapping Worksheet to be submitted to the Project in December 2025 (RW Task 630).

Testing Progress Tracking and Reporting

Agencies will be responsible for tracking and reporting UAT progress. Agencies should track:

- overall testing progress to determine if the agency is on track to complete testing activities on time;
- end user participation;
- progress and validation of agency business processes; and
- testing errors and statuses for Florida PALM and agency business systems.

Agencies will report progress of UAT to the Project across the four critical components of readiness: people, processes, technology, and data. Examples, include:

- **People** – Participation rate of end users
- **Processes** – Completion rate (percentage complete) of planned user stories
- **Technology** – Testing progress of Agency Business Systems with direct interfaces to Florida PALM
- **Data** – Confirmation of conversion and configuration data

Testing Errors

Agencies are expected to track and report on testing errors. This is a critical role of the agency's Testing Triage Team. All testing errors should be reported within the agency to the agency Testing Triage Team. The team should review all reported errors on a regularly scheduled basis. The purpose of the team is to review all reported testing errors to determine the nature of the issue and next course of action, as some errors can be resolved within the agency while others will

need to be reported to the Project through SNow. All testing errors must be reviewed daily and if action is required by the Project, the ticket(s) must be logged daily.

NOTE: Although all end users will have the ability to log tickets in SNow, agencies should require all end users to submit errors to the agency Testing Triage Team prior to logging a ticket.

Examples of testing errors that will require internal resolution:

- End user is unable to complete user story because the end user does not have the correct role assignment.
- User story failed because the needed agency-specific ChartField value is not available.
- Agency Business System is unable to accurately consume a file from Florida PALM.

Examples of testing errors that should be reported by logging a testing error ticket in SNow includes:

- A report did not provide expected results due to report generation error (e.g., timing out) or missing information.
- A returned error message is unclear, is not adequately explained in the UAT materials, and error resolution steps are indeterminate.
- An Approver is unable to approve a transaction despite having an assigned approver role.

Agencies will be expected to report their progress related to UAT and agency training of end users during their monthly touchpoints with the Project, their bimonthly (or other cadence) status report, and through the readiness certification process. This process will ensure consistent and frequent updates from agencies on how they are progressing as an agency.

Additional guidance for tracking and reporting testing progress will be provided by the Project before the start of UAT.

Testing Coordination

Agency execution and management of UAT will require significant coordination within the agency, across several critical agency roles including their UAT Coordinator, SAMs, IDP SMEs, File Managers, Triage Team, and SMEs. In order to effectively support UAT execution, these roles will require significant time commitment across the duration of UAT. The following table describes these roles, their key responsibilities, and UAT support criticality.

Table 5: Agency Testing Coordination Roles and Responsibilities

Role	Responsibility	UAT Support Criticality
UAT Coordinator	<ul style="list-style-type: none"> • Track and confirm testing progress. • Lead the Testing Error Triage Team. • Serve as the primary point of contact with the Florida PALM Project team for reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline. 	This role is critical for providing needed direction and alignment within the agency and for representing agency progress to the Project. This role should maintain constant awareness of agency efforts, support resolution of issues internally (remove blockers, connect resources), and be able to work across internal

Role	Responsibility	UAT Support Criticality
		organizational lines for the overall success of the agency testing.
Testing Error Triage Team	<ul style="list-style-type: none"> Meet regularly to review progress and discuss upcoming activities. Review testing errors to determine resolution or need for escalation. Monitor SNow tickets for new items, status changes on existing items, and resolution of tickets that need to be communicated within the agency. Communicate common issues and resolutions to the SMEs and Training Liaison to support end user testing activities and development of agency training 	The regular and timely review and discussion of testing errors at a cross-team / agency level will help to ensure progress of testing efforts, as well as alignment across the agency for identified and resolved issues.
Subject Matter Experts <i>(Assigned per Business Process Grouping)</i>	<ul style="list-style-type: none"> Support UAT planning (e.g., user stories/script development, agency-specific materials development). Participate as first end users in UAT. Conduct Agency-Led Expanded End User Testing session(s) with end users. Serve as primary point of contact for end user business process, data, and technical questions. Support agency-specific training materials development. Report testing errors and testing progress to UAT Coordinator. Support end user understanding during UAT and after go-live. Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions. 	Support by the SME is critical to the success of the end users within the agency. Their responsiveness and ability to assist in end user issue resolution will be essential for agency UAT success.
Security Access Manager (SAM)	<ul style="list-style-type: none"> Perform and track role assignment changes for SMEs and end users throughout UAT. Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions. 	Support will need to be continual in order to resolve testing issues related to role assignment.
Identity Provider (IDP) Subject Matter Expert	<ul style="list-style-type: none"> Add end users to the active directory (or applicable tool) for access to UAT. Maintain active directory for access throughout UAT (adding new end users or removing end users as needed). 	Support will need to be timely to ensure end user role access and resolution of any testing issues related to access.

Role	Responsibility	UAT Support Criticality
File Manager	<ul style="list-style-type: none"> • Serve as the primary point of contact for interface testing. • Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM. 	Support will be as needed to resolve any interface testing issues, including escalation to the Project Team.

UAT Scope and Success Criteria

Testing Scope

Agencies should identify and document the scope of their testing needs based on the changes to their people, processes, technology and data.

- **People** – Who should participate in testing?
- **Processes** – What activities need to be tested and validated?
- **Technology** – What related agency business systems that should be included in testing?
- **Data** – What data values need to be validated?

People

Testing scope also includes the identification of all required testing participants. The primary testing participants will be the future Florida PALM end users. Agencies established and later updated a list of future Florida PALM End Users (RW Tasks 512 and 564). Agencies are encouraged to maintain as staffing changes occur. Agencies will role map Subject Matter Experts prior to the start of UAT (RW Task 573-A) and the remaining end users will be role mapped prior to the start of full UAT (RW Task 573-B).

Some agencies may require additional testing participants beyond the Florida PALM end users, such as users of related agency business systems or related Enterprise systems, such as MFMP or PCard Works. Agencies may also identify the need to include roles outside of systems. Any person or role that is needed to complete an agency business process from end to end should be considered.

Processes

Before agencies can begin developing user stories, they must first confirm all the processes and subprocesses, or activities, that must be tested during UAT. To confirm all the activities that must be tested, agencies must

1. Understand current business practices, as documented in the Agency Current State Analysis.
 - a. RW Task 324 – Complete FLAIR Data Elements Inventory
 - b. RW Task 325 – Complete Data Security and Access Survey
 - c. RW Task 326 – Update Current State Agency Business System Inventory and Documentation
 - d. RW Task 327 – Complete Reports Inventory
 - e. RW Task 328 – Document Current Agency Business Processes
2. Understand Florida PALM Design, presented to agencies through a series of design workshops and documented in the [Knowledge Center](#).
 - a. Business Processes, subprocesses and activities
 - b. Chart of Account Design
 - c. Configurations
 - d. Conversions
 - e. End user roles, access and security
 - f. Interfaces
 - g. Reports
 - h. Workflow
3. Understand the changes to the agency's current state based on Florida PALM design, including changes to people, processes, technology, data.

Agencies will create an inventory of all activities that should be tested in Florida PALM and document changes to people, processes, technology, and data using the Change Analysis Tool (RW Task 560). While agencies are expected to complete and submit the Change Analysis Tool in January 2025, it will remain available for agencies to update and maintain through UAT. The Change Analysis Tool may also be used to support the agency's tracking and reporting of testing progress.

Technology

Agencies should consider activities outside of the Florida PALM solution that may also need to be incorporated in the scope of UAT, such as activities in related agency business systems. Agencies have had the opportunity to identify agency business system test cases through a series of RW tasks to update Agency Business System Documentation (RW Tasks 504, 516, 528, 544, and 558.) Agencies should plan to test Agency Business Systems based on their identified test cases during full integration testing in July 2025.

Data

Agencies should identify the critical data changes that must be tested and validated. Data considerations include the validation of

- Agency-specific configuration values
- Reporting needs
- Data access (e.g., end users have access to necessary data)

Success Criteria

Once agencies understand the scope of UAT, they should identify the success criteria for UAT completion. Agencies should identify and prioritize what is critical for successful completion of UAT (must haves vs. nice to haves), which means they are able to certify readiness to go live. Figure 3 shows the relationships between the various agency efforts, which all lead to certification of readiness.

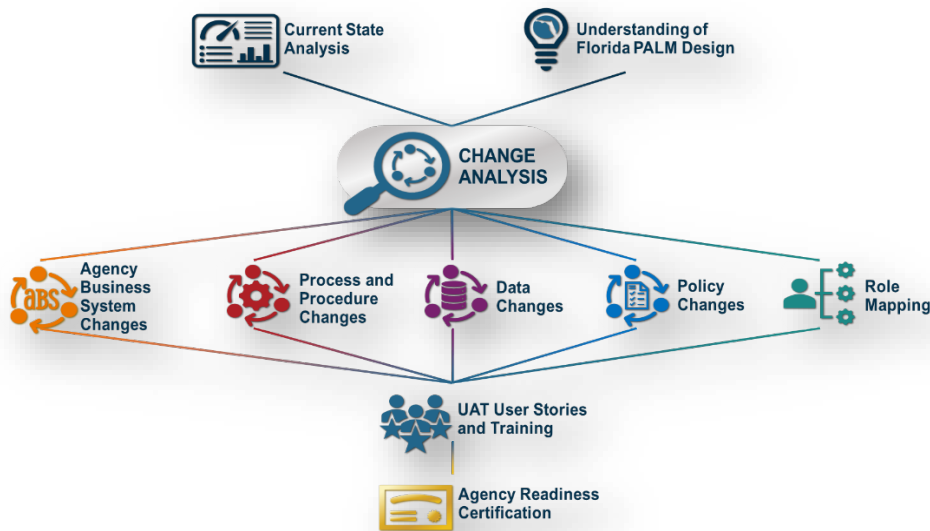


Figure 3: Agency Activities Impact on Readiness Certification

The Project has provided criteria for [Agency Readiness Certification](#). Agencies must certify that they have completed readiness activities across the four critical operational elements: people, processes, technology, and data. Agency completed and submitted Readiness Certification will be provided to the Executive Steering Committee for review to consider each agency’s readiness as they prepare to vote on Stage Gate 4: Agency Readiness in November 2025.

Final submission of the Agency Readiness Certification will occur in November 2025 (RW Task 628), indicating the culmination of all testing activities and that the agency is ready to go-live. The following are UAT related criteria for the final submission of the Agency Readiness Certification in November 2025.

People

- End users have practiced or will practice completing job functions in UAT before go-live.
- End users have tested and validated end user roles.

Processes

- All business processes from end-to-end have been tested and validated.

Technology

- All critical interfaces have been tested and validated.
- All critical agency business system remediation has been tested and validated.
- Agency has updated their agency specific deployment plan based on end-to-end testing.

Data

- All agency specific configurations have been tested, validated and confirmed (including any final updates provided to the Project).
- All reporting needs and solutions have been tested and validated.

NOTE: At a minimum, agency UAT success criteria should align to the criteria defined in the Agency Readiness Certification.

Mitigating Gaps in UAT Success Criteria

The achievement of successful completion of UAT is strictly to the benefit of the agency and its stakeholders, ensuring that the agency's people, processes, technology and data are ready for the transition to Florida PALM at go-live. However, it is recognized that some agencies may not fully meet their success criteria for completion of UAT.

Agencies should identify and monitor any risks that may impact the successful completion of UAT. As with any risk, if a risk materializes and becomes an issue, agencies should act immediately by developing a mitigation plan, following the agency's Risk and Issue Management Plan.