

Florida PALM User Acceptance Testing Approach



When Does it Happen and What's Included

User Acceptance Testing (UAT) is expected to begin in April 2025

UAT will include testing for the next major implementation:

Financials Wave

Payroll Wave

Data Warehouse/Business Intelligence (DW/BI).

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.

For what will agencies use UAT?

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
- 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.

Train the Trainer

UAT will begin with several months of project-hosted sessions where agency 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.

Florida PALM Team Responsibilities

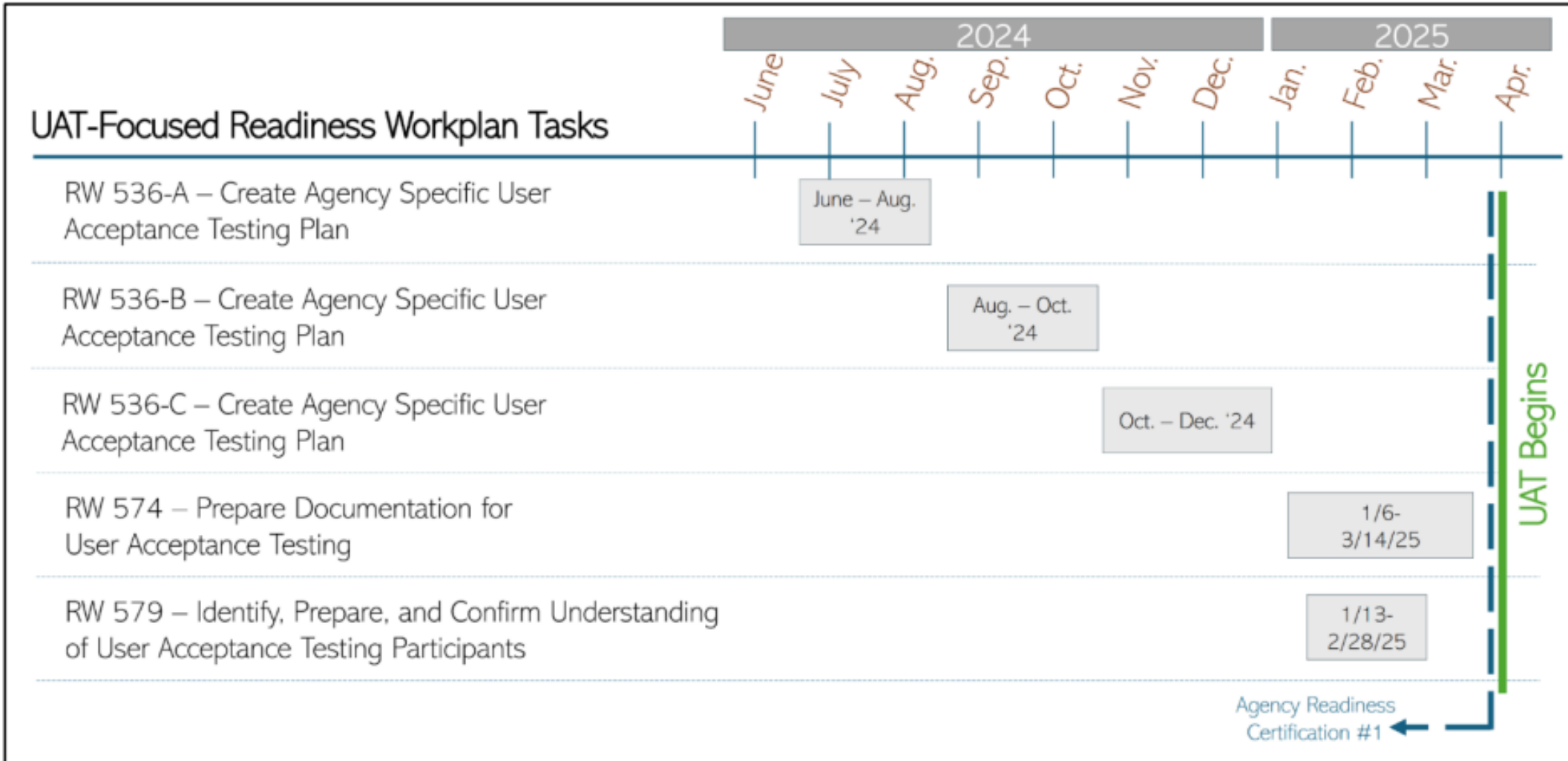
- Initial load of end users and role assignments before the start of UAT.
- Initial load of agency-specific configuration values, as confirmed by agencies.
- Initial load of agency conversion data, based on Mock Conversion 3.
- Create access to the UAT environment for all end users with an agency-assigned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

Task 536 -Create Agency Specific User Acceptance Testing Plan

This task has been separated into three manageable subtasks to allow our agency to gather, add, or update information within our UAT plan as it becomes available through completing other readiness tasks or receipt of Project information.

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

Agency Readiness Certification #1 in March 2025



Agency UAT Readiness Criteria and Related RW Tasks

Confirm UAT readiness in March 2025

Critical Operational Element	Readiness Criteria to Begin UAT	Related RW Tasks	Dates
People	<ul style="list-style-type: none"> All end users 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 	<ul style="list-style-type: none"> 6/17/24 – 12/13/24 1/6/25 – 2/28/25 1/13/25 – 2/28/25 2/3/25 – 3/14-25
Processes	<ul style="list-style-type: none"> Change impacts have been identified for all processes. Process documentation has been updated for all processes. Agency-specific testing materials including user stories have been developed. 	<ul style="list-style-type: none"> 560 – Submit Change Analysis Tool 574 – Prepare Documentation for User Acceptance Testing 580 – Update Agency Business Process Documentation 	<ul style="list-style-type: none"> 10/21/24 – 12/20/24 1/6/25 – 3/14/25 1/3/25 – 3/28/25

Agency UAT Readiness Criteria and Related RW Tasks

Confirm UAT readiness in March 2025

Critical Operational Element	Readiness Criteria to Begin UAT (March 2025)	Related RW Tasks	Dates
Technology	<ul style="list-style-type: none"> Agency Identity Provider (IDP) has been configured with Florida PALM UAT environment. Agency end users have been added to the agency's IDP. Agency specific Mock Conversion 3 files have been provided (if any). 	<ul style="list-style-type: none"> 578 – Confirm Identity Provider for Florida PALM 583 – Participate in Mock Conversion 3 591 – Confirm IDP Configuration for Florida PALM 592 – Agency IDP SMEs Add Identified User Acceptance Testing Participants to Agency's Identity Provider 	<ul style="list-style-type: none"> 1/13/25 – 2/28/25 1/21/25 – 1/31/25 3/3/25 – 3/21/25 3/3/35 – 3/28/25
Data	<ul style="list-style-type: none"> Agency specific configurations have been confirmed. Agency test data has been identified. Agency data is cleansed, based on Mock Conversion 2 results. Agency has an approach to meet reporting needs. 	<ul style="list-style-type: none"> 567 – Share, Review, and Update Configuration Workbooks 571 – Complete Data Cleansing Based on Mock Conversion 2 581 – Update Reports Inventory 	<ul style="list-style-type: none"> 12/2/25 – 1/24/25 1/6/25 – 1/17/25 1/13/25 – 3/28/25

Agency UAT Readiness Criteria and Related RW Tasks

Full Integration Testing in July 2025

Critical Operational Element	Readiness Criteria to Begin Full Integration Testing	Related RW Tasks	Dates
Technology	<ul style="list-style-type: none">• All interface needs have been confirmed.• Agency Business System testing environments have been established and confirmed.• Technical interface testing successfully completed.• Agency business system documentation is fully updated.• Agency business system remediation and internal testing is complete.• Test scripts 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• 609 – Confirm Ready for Full Integration Testing	<ul style="list-style-type: none">• 1/6/25 – 4/25/25• 1/6/25 – 6/13/25• 1/6/25 – 6/27/25• 6/16/25 – 7/3/25

UAT Specific Roles and Responsibilities

Role	Responsibility	Name
UAT Coordinator	<p>Track and confirm testing progress.</p> <p>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.</p>	Laurie Kershaw
Testing Error Triage Team	<p>Meet regularly to review progress and discuss upcoming activities.</p> <p>Review testing errors to determine resolution or need for escalation.</p>	Hunter Jones Tanya Maphis Erik Green Clay White Anna Yawn Chris Bowling Rachel Korade
Subject Matter Experts (Assigned per Business Process Grouping)	<p>Support UAT planning (e.g., user stories/script development, agency-specific materials development).</p> <p>Participate as first end users in UAT.</p> <p>Conduct agency hosted UAT session with end users.</p> <p>Serve as primary point of contact for end user business process, data, and technical questions.</p> <p>Support agency training material development.</p> <p>Report testing errors and testing progress to UAT Coordinator.</p> <p>Support end user understanding during UAT and after go-live.</p> <p>Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions</p>	TBD

UAT Specific Roles and Responsibilities

Role	Responsibility	Name
Security Access Manager	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.	Timothy Coughlin and April O'Mara
Identity Provider Subject Matter Expert	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).	Mike Turner and Westley Farmer
File Manager	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	Sherry Lake
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	Sherry Lake
End Users	Practice related job processes. Confirm end user role assignment(s). Report testing errors and testing progress to SME or UAT Coordinator, as appropriate.	TBD