

Task Instructions

Task ID: 326

Wave: *Financials and Payroll Waves*

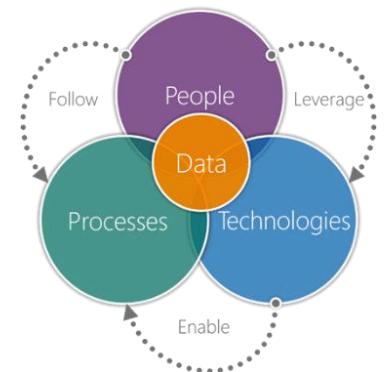
Task Name: *Update Current-State Agency Business System Inventory and Documentation*

Task Type: *Business Processes, Interfaces*

Task Due Date: *October 27, 2023*

Task Overview

Florida PALM is a business transformation project that will affect your agency's people, processes and technologies (systems). Understanding and documenting your agency business systems technical and functional specifications is critical to ensuring a successful transformation in your agency. Knowing the who, what, where, when, why and how your agency business systems currently function will better prepare you to complete future business transformation tasks such as identifying needed Florida PALM interfaces, developing a plan for business system remediation, and then completing business system remediation.



Previously, agencies completed Readiness Workplan (RW) [Task 102: Submit Florida PALM Technical Inventory Workbook](#) that included a business systems analysis, interface inventory, and conversion inventory planned for the Financials Wave. RW Task 326 expands on the work documented in the Business System Analysis within your agency's Inventory Workbook (in Smartsheet) to focus on ensuring your agency business systems documentation is up to date with current-day technical and functional specifications, including how data flows between systems.

The original Inventory Workbook task (Task 102) was primarily focused on capturing business system and interface details that would use and share data with Florida PALM for Financials Wave. The focus of RW Task 326 is different from the original in two particular ways:

- This task is a current-state perspective of identifying and documenting agency business systems and interfaces that share and/or use FLAIR data.
- This task broadens the scope of business systems and interfaces to include those that share and use Payroll (PYRL) data with FLAIR.

The elements of RW Task 326 are:

1. Review and update your agency's *Current-State Business Systems* worksheet (previously called Business System Analysis) in your agency's Inventory Workbook.
2. Complete the new *Current-State Interfaces* worksheet that has been added to your agency's Inventory Workbook.
3. Review and update each business system's technical and functional documentation.

To help you complete this task, the [Task 326 Resource: Smartsheet Columns](#) document provides detailed instructions, by column, for how best to complete the inventory worksheets in Smartsheet. Please refer to that document when completing this task.

Task Elements

1. *Current-State Business Systems Worksheet*

Review and update the agency business system(s) listed in your Current-State Business Systems worksheet in Smartsheet and determine what needs to be updated about existing systems, what systems can be removed, and what systems need to be added. All agency business systems that interface with FLAIR and/or contain FLAIR data should be included for both financial and payroll processes.

For existing and new agency business systems, additional columns have been added to capture supplemental information. The following columns are further described in the *Task 326 Resource: Smartsheet Columns* document:

- Business System Name
- Business System Type
- Technology Type
- Primary Business System Contact Person
- Primary Business System Functional Owner
- Primary Business System Technical Owner
- Business System Maintained by
- Approximate Number of Business System Users
- Business System Tier
- Business System Criticality
- Current-State Technical Documentation Status

2. *Current-State Interfaces Worksheet*

A new sheet has been added to your agency's Inventory Workbook to help you identify all the files that you are sending to FLAIR and/or receiving from FLAIR and all the agency business systems that are using the data. In this sheet, further described in the *Task 326 Resource: Smartsheet Columns* document, you will document all the current interfaces that your agency receives or sends that include FLAIR data and identify:

- Interface Long Name
- Interface Short Name
- Inbound to Agency / Outbound from Agency
- Source / Target
- Interface Type
- Frequency
- Interface Filename
- Associated Business System(s)
- Comments

3. *Agency Business System Documentation*

Each agency business system identified in your Current-State Business Systems worksheet, which you plan to retain with Florida PALM, should have all current functional and technical specifications well documented. If you have agency business system documentation, now is the time to review it to ensure it is current and complete. If you do not have documentation for your agency business systems, this task will serve as a starting point for your agency. The documentation is at the discretion of your agency, but a sample *Task 326 Resource: Agency*

Business System Documentation Template has been provided as an example. As documents are created, your agency should create a library of agency business system documentation that can be easily referenced for future tasks.

The technical documentation should include knowing what, when, where, and how your agency business systems currently interface and exchange data with FLAIR and other systems (both internal and external to your agency). When creating or confirming your documentation, key questions include:

- Are the technical documentation and / or process maps clear and up to date?
- Does the documentation include a description of the data handling processes (i.e., how the data is interpreted, cleansed, computed or translated into and out of the system)?
- Are the inputs and outputs fully documented?
- Is the “where used” documented?
- Is the “how used” documented?

How can agencies use this current-state information and documentation?

You will use the information captured in your Current-State Business Systems Worksheet, Current-State Interfaces worksheet, and agency business system documentation during future analysis of your agency’s change management activities and tasks, specifically future tasks to update your agency’s Florida PALM interface selections. You will also use this information to develop your agency specific plan to remediate your agency business systems. Finally, you will use the information to support the creation of your agency’s business process documents.

What will the Florida PALM Team do with this information?

To support future work, the Florida PALM team will use the updated Current-State Business Systems and Current-State Interfaces worksheets to gain a broad understanding of agencies’ existing systems and interfaces as we move into Design and Build phases of Florida PALM.

Task Instructions

Coordinate with your agency’s Change Champion Network (CCN) and functional and technical subject matter experts familiar with your agency business systems to complete this task. As your agency experienced with the preparation for the Personalized Agency Working Sessions, the list of divisions, offices, and individuals that use or access agency business systems may be long. The most effective way to ensure comprehensive documentation for your agency is to engage all stakeholders within your agency.

Please plan accordingly, from a timing, resource, and engagement perspective, to allow your agency time to complete the activity by the requested date. Throughout the Task completion period, there will be Project-led meetings and touch points planned where your agency may seek clarification, or you may direct questions to your Readiness Coordinator (RC).

Review and complete the Current-State Business Systems worksheet columns that have been added to your Inventory Workbook in Smartsheet and the new Current-State Interfaces worksheet. As a reminder, your Smartsheet Workbook is a protected series of workbooks and can only be updated by the staff you designated for Smartsheet updates. Export your worksheets (including the new columns) to Excel to collaborate with system stakeholders. The Smartsheet should be updated with your agency’s information by the requested due date.

Instructions
1) <i>With your CCN, determine an approach to review, understand, and document the Current-State of your Agency Business Systems from a technical and functional perspective.</i>
2) <i>Review and update your Current-State Business Systems worksheet in Smartsheet. Provide responses in the empty cells for all business systems.</i>
3) <i>Document all current interfaces in the Current-State Interfaces worksheet in Smartsheet and provide responses in the empty cells for all interfaces.</i>
4) <i>Create, update, or confirm Current-State documentation for all agency business systems. Create a library of updated documentation for future reference.</i>
5) <i>Complete the Current-State Business Systems worksheet, Current-State Interfaces worksheet, and updates to agency business system documentation by October 27, 2023.</i>
6) <i>If you have questions regarding this task, participate or review the Tuesday Task Talk on Tuesday, March 14, 2023, or contact your RC.</i>
7) <i>Participate in future touch points / meetings (e.g., Tuesday Task Talks, Town Halls) related to this task.</i>
8) <i>Be prepared to discuss your agency's progress through monthly touchpoint meetings with your RC.</i>

Supporting Materials & Resources:

- [Agency Current-State Analysis Approach](#)
- [Task 326 Resource: Smartsheet Columns](#)
- [Task 326 Resources: Documentation Template](#) – This template shows one example of how to organize business system technical and functional documentation.
- **Smartsheet Resources** – Documentation provided by the Florida PALM Project to support agency use of the Smartsheet tool
 - [Smartsheet User Guide](#)
 - [Smartsheet Access Request](#)
 - [Smartsheet Job Aid](#)