

Task Instructions

Task ID: 558

Task Name: Update Agency Business System Documentation

Task Start Date: November 18, 2024

Task Due Date: January 10, 2025

Project Impact: N/A

Task Descriptions

Update agency business system documentation including functional requirements, technical requirements, and test cases.

Task Overview

Florida PALM is a large-scale business transformation impacting your people, processes, technology, and data. You must plan for your transformation to be successful. Once you have a plan in place, you can begin to remediate based on your plans.

Transformation planning for your agency business systems requires:

1. An understanding of the current state of your business systems and the business needs the systems support;
2. An understanding of future state, including how Florida PALM will work and the related integration options; and
3. Selecting and planning for the integration option(s) that best fit your business needs then remediating your business systems.

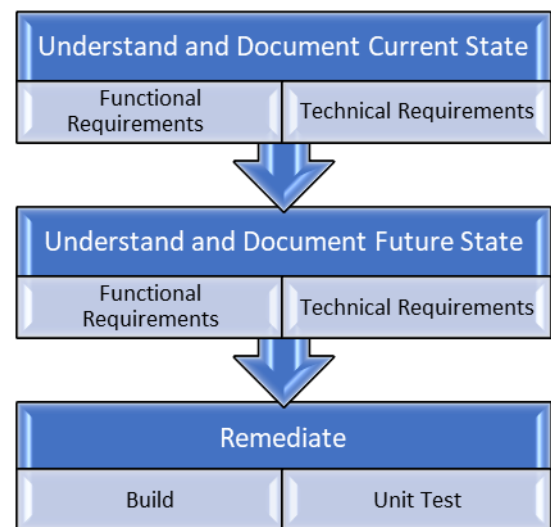


Figure 1: Transformation Planning

For this task you will review and update your agency business system documentation based on your final selection of interfaces, in preparation for Cycle 2 – Technical Interface Testing.

Review and Update Agency Business System Documentation

As you are reviewing Florida PALM Financials and Payroll waves designs and making interface selections (RW Task 557), you must update any related agency business system documentation to reflect the changes needed to prepare for the new integration to Florida PALM. You should also document any downstream impacts to Agency Business Systems that are not planned to be integrated directly to Florida PALM.

As a reminder, documentation for Agency Business Systems should include functional and technical specification requirement changes needed to integrate with Florida PALM. The [Agency Business System Documentation Template](#) (initially provided in RW Task 326) is a good resource to review to determine the nature of the critical elements of business system specification changes.

When reviewing and updating your documentation, consider the following questions:

- What does the agency business system do (functional process) and how might it have to change to meet Florida PALM requirements?
- How does the Florida PALM workflow process change agency business processes and how does it affect related agency business systems?
- What interface connections will be needed between Florida PALM and agency business systems (RW Task 557)?
- Are there any user interface design changes needed for agency business systems?
- Does the Florida PALM report offerings or Data Warehouse availability change agency reporting needs? What report design changes are needed for Florida PALM integration?
- Are there any middle tier or backend application programming design changes needed?
- What agency business system configuration changes are needed?
- Are there any database design changes needed?
- What unit test plans (for testing all design changes) are needed before Cycle 2 – Technical Interface Testing begins in April 2025?

You were required to complete a series of tasks after each design segment requiring iterative updates to your agency business system documentation. This is the final task to update your agency business system documentation prior to Cycle 2 – Technical Interface Testing. It is critical that your agency business system documentation is updated to ensure your agency can complete testing smoothly and successfully.

NOTE: As of the date of this task release, 11/18/24, twelve agencies have a current Project verification status of Submission Incomplete for Task 544 – Update Agency Business System Documentation for Segment IV. If your agency has not completed documentation updates for prior segments, you will not be able to complete the final update task.

Based on your understanding of your agency business system functionality, Florida PALM functionality, and your agency’s planned integrations and interface selections, you must determine if there are any additional impacts to any of your agency business systems and whether additional updates are needed to your agency business system documentation.

A new column, “ABS Documentation Updates Complete” has been created for this task iteration. Select the check box to confirm that all Agency Business System documentation statuses are correct and updated for all segments.

NOTE: To select the check box in the “Final ABS Documentation Complete” column, all agency business systems listed in your agency specific Implementation Interfaces & Documentation worksheet should have a status of “Documentation Update Not Needed” or “Documentation Update Complete” in the ABS Documentation Status.

Agency Business Systems	System Readiness Activity	Business Purpose	Planned Integration	Florida PALM Interface Selection(s)	ABS Documentation Status based on Segment I	ABS Remediation Status based on Segment I	ABS Documentation Status based on Segment II	ABS Remediation Status based on Segment II	ABS Documentation Status based on Segment III	ABS Remediation Status based on Segment III	ABS Documentation Status based on Segment IV	ABS Remediation Status based on Segment IV	ABS Documentation Updates Complete
Agency Engineering System	Remediate Components of the Agency Engineering System	Agency Engineering	Interface / Direct Connection Using Standard Interface	(JAP002) - Inbound Voucher Load (JAP012) - Outbound Voucher and Payment Export	Documentation Update Complete	Remediation Complete	Documentation Update Not Needed	Documentation Update Not Needed	Documentation Update Complete	Remediation Complete	Documentation Update Complete	Remediation In Progress - 50%	Documentation Update Complete
Financial Reporting Application System	Remediate Components of the ACPR Reporting System	ACPR Reporting	Interface / Direct Connection Using Standard Interface	(GL001) - Outbound CheckField Values	Documentation Update Not Needed	Remediation Not Needed	Documentation Update Not Needed	Remediation Not Needed	Documentation Update Not Needed	Remediation Not Needed	Documentation Update Complete	Remediation In Progress - 25%	Documentation Update Complete

Figure 2: <Agency> Implementation Interfaces & Documentation worksheet in Smartsheet

While not requested as part of this Task, you should be prepared to show updated agency business system documentation with the Project as part of readiness touchpoints or through other requests, as needed.

How will agencies use this information?

Confirming agency business system changes are well documented will help your agency to:

- Better understand scope, level of effort, and resource needs for agency business system transformation
- Refine your timeline and plan for remediation
- Support resource requests (e.g., legislative budget requests)
- Prepare for Cycle 2 – Technical Interface Testing in April 2025 and end-to-end User Acceptance Testing in July 2025

How will Florida PALM use this information?

By providing confirmation of your updated agency business system documentation, the Project team will gain insights into your agency’s unique planning and level of remediation efforts, as well as identify trends across agencies. Collectively the readiness tasks provide the Project team insights that allow us to better assist each agency.

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

Table 1: Task Completion Rubric

Task Completion Rubric
Task 544 – Update Agency Business System Documentation for Segment IV has been verified by the Project as Submission Complete in your RW Task Tracker.
For each ABS listed, a checkmark has placed in the ABS Documentation Updates Complete column.
Task Tracker has been marked as 100% complete.

Task Instructions

Collaborate with your Change Champion Network and functional and technical SMEs to review the related agency business system documentation and update as needed. Once all documentation updates needed are complete, confirm completion in the *Implementation Interfaces & Documentation* worksheet in Smartsheet for each Agency Business System.

Smartsheet Navigation:

- Current-State Business Systems is located in:
Florida PALM Workbook for (Agency) > Inventories > Business System Inventory

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 1 above.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Collaborate with your CCN and functional and technical SMEs to understand the Florida PALM Financials and Payroll Wave designs and integration needs to support your agency business functions.
2) Update Agency Business System documentation to reflect integration changes.

Summary of Task Completion Steps

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| <p>3) <i>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.</i></p> |
| <p>4) <i>Confirm completed updates to agency business system documentation by January 10, 2025.</i></p> |
| <p>5) <i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i></p> |
| <p>6) <i>If you have questions regarding this task, participate in Thursday Task Talks or contact your Readiness Coordinator.</i></p> |

Supporting Materials and Resources:

- [RW Task 326 - Update Current-State Agency Business System Inventory and Documentation Materials](#)
- [Interface Layouts](#) in the Knowledge Center
- [Business Process Models](#) in the Knowledge Center
- [Design Workshops](#) materials (Business process flows, recordings, presentations)