

Task Instructions

Task ID: 515

Task Name: *Identify Change Impacts and
Update Agency Business Process Documentation for Segments I and II*

Task Start Date: January 29, 2024

Task Due Date: April 12, 2024

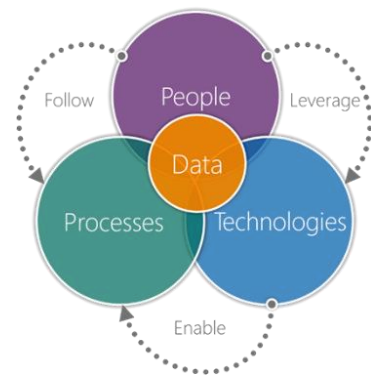
Task Description

Review Segment I and II resources; identify changes to people, process, technology, and data and update current state business process documentation.

Task Overview

Florida PALM is a business transformation that will change how you do business. Agencies must identify and prepare for changes across the four critical operational elements: people, processes, technology and data.

You have previously completed a series of Current State Analysis Readiness Workplan (RW) tasks to understand and document current business practices.



- Task 324 – Complete FLAIR Data Elements Inventory
- Task 325 – Complete Data Security and Access Survey
- Task 326 – Update Current State Agency Business System Inventory and Documentation
- Task 327 – Complete Reports Inventory
- Task 328 – Document Current Agency Business Processes

This task (RW Task 515) requires an understanding of your current agency business functions and an understanding of the Florida PALM functionality designed in Segments I and II. Through this task, you will begin to compare your current way of work to the future way of work in Florida PALM and identify changes to your people, processes, technology and data. This is an iterative activity and will be repeated after each of the two future design segments (RW Tasks 527 and 543) and will support your agency’s completion of the Change Analysis Tool (RW Task 560).

Task Elements

Gain Understanding of Segments I and II Functionality

Review the Project-published resources with your functional and technical subject matter experts (SMEs) to gain an understanding of the related functions in Florida PALM. The following resources for Segments I and II have been published to the [Knowledge Center](#) and shared with agencies. These resources were also presented and discussed in the related [Design Workshops](#).

- [Business Process Models](#) for Segments I and II shown in Table 1.
- Related interface and report layouts found in the [Interface Catalog and the Reports Catalog](#).

Table 1: Business Process Models in Segments I and II

Business Process Grouping	Business Process or Subprocess
Account Management and Financial Reporting	<ul style="list-style-type: none"> 10.1 Set Up and Maintain Chart of Accounts 10.2 Enter and Process Journals
Budget Management and Cash Control	20.1 Enter and Process Budget Journals
Disbursement Management	<ul style="list-style-type: none"> 30.2 Establish and Maintain Encumbrances 30.3 Enter and Process Vouchers 30.4 Process Payments 30.5 Manage Payments
Asset Accounting and Management	<ul style="list-style-type: none"> 40.1 Acquire and Set Up Assets 40.3 Set Up and Maintain Asset Controls
Accounts Receivable	60.2 Deposit and Apply Receipts
Grants Management	90.2 Create and Maintain Grants
Contract Management	90.3 Create and Maintain Contracts
System Access and Controls	120.1 Interface Error Handling Process

Identify Change Impacts

Compare your current business functions with the business functions of Segments I and II design and begin identifying the related Florida PALM business process models, level of impact by critical operational element, and the applicable spreadsheet uploads.



Figure 1: Key Task Activities

Select Related Business Process Model(s)

Review your *Current-State Business Processes* inventory. Begin identifying which of your current business processes or subprocesses align to a Segment I or II Business Process Model. For all impacted current-state business processes, select the related Florida PALM Business Process Model(s) from the provided drop-down list in the new column titled “*Related Florida PALM Business Process Model.*” For example, your current process to set up an encumbrance would relate to the Florida PALM 30.2 Establish and Maintain Encumbrances business process model. Making this connection is the critical first step in identifying changes to how you do business today.

Select Level of Impact

After identifying the related business process model, determine how your business will change for each critical operational element and determine the level of change impact: High, Medium, Low, None, or Uncertain. When considering the impact and which of the critical operational

elements may be impacted, think about where the agency's efforts will be targeted for managing the change.

- Will it be individuals that are impacted? → Then note the impact for **People**.
- Will it be the flow of information or activity sequence, the supporting tools (e.g., forms or procedure manuals) that is impacted? → Then note the impact for **Processes**.
- Will it be a business system that is impacted? → Then note the impact for **Technology**.
- Will it be the input or output received that is impacted? → Then note the impact for **Data**.

People – The staff and stakeholders affected by your agency's transition to Florida PALM. *Examples include staff that complete or support the completion of a process, users of the information or resulting process, and external parties that rely on the information. You should identify if you need to include other staff to support the future statewide business process, beyond those existing staff that currently support the business process.*

Processes – The sequence of procedures to accomplish a business objective. *Examples include approval of transactions, the content and use of paper or electronic forms, or the production of reports (not the information, but the process of creating the report itself). These would be functions that are established and managed within the agency in support of the future statewide business process.*

Technology – The applications or tools used to process, track, or report on financial operations. *Examples include interfacing business systems (Tier 1) or business systems that support the business processes without interfacing directly (Tier 2 or greater).*

Data – Information used in or produced from an agency's financial business operations. *Examples include information that is input to or produced from a transaction or business process.*

The below table provides example changes for each impact level. They are not meant to be exhaustive or fit all scenarios for your agency. Your CCN and SMEs should determine the criteria that works best for your agency's assessment for each element.

Table 2: Example Changes for Determining Impact Levels by Critical Operational Element

Impact Level	Critical Operational Element			
	People	Process	Technology	Data
High	<ul style="list-style-type: none"> • Large number of other staff will be assigned Florida PALM role(s) • Significant number of other and existing staff will require new knowledge (<i>beyond just how</i> 	<ul style="list-style-type: none"> • New process for the agency will require a significant amount of effort to define • Current agency process that will require extensive changes 	<ul style="list-style-type: none"> • New agency business system will need to be created, tested and ready for go-live • Current agency business system will need to be fully remediated, tested, and ready for go-live 	<ul style="list-style-type: none"> • New chart of account data elements needed, which require new data values to be determined • Current data elements require extensive changes or substantial cleansing

Impact Level	Critical Operational Element			
	People	Process	Technology	Data
	<i>to use Florida PALM)</i>			
Medium	<ul style="list-style-type: none"> Other staff will be assigned Florida PALM role(s) Existing staff will require new knowledge (<i>beyond just how to use Florida PALM)</i>) 	<ul style="list-style-type: none"> New process for the agency will require a moderate to minimal effort to define Current agency process that will require moderate to minimal changes 	Current agency business system will need to be partially remediated, tested, and ready for go-live	<ul style="list-style-type: none"> Current data elements require moderate to minimal changes or cleansing New data fields are required to be defined
Low	Existing staff will continue to serve in the role(s) and with current knowledge level (<i>beyond just how to use Florida PALM)</i>)	Current agency process that will require minimal revision	<ul style="list-style-type: none"> Current agency business system will require minor update(s), testing, and readiness prior to go-live Current agency business system can be remediated or retired after go-live 	Current data elements are unchanged but may require cleansing
None	No staff resources will be impacted	No agency-specific process impact	No agency business systems or other tools are impacted	No agency data is impacted
Uncertain	Based on the review, we are unsure of the impact.			

NOTE: For any items marked Uncertain, include a comment in the associated comment field to capture the pending information needed to make the assessment.

Select Spreadsheet Uploads

Agencies perform several types of transactions in FLAIR today through the process of screen scraping and/or scripting. This is typically done through the utilization of software like Entire Connect, not through the use of an agency business system. Florida PALM does not allow for the use of screen scraping or scripting. A spreadsheet upload can be a great alternative, as it only requires the use of a standard Excel spreadsheet template populated by a user and then uploaded as needed (by authorized roles) to Florida PALM. Depending on the volume of transactions needed, spreadsheet uploads should also be considered in place of standard interfaces or manual data entry.

RW Task 505 required your agency to make initial Florida PALM interface and spreadsheet upload selections based on Segment I. This task expands on that by requiring you to update your spreadsheet upload selections based on Segments I and II, and by associating your selections with the related agency business process instead of agency business system.

NOTE: *Spreadsheet uploads are no longer included in the drop-down list of standard interfaces on the Implementation Interfaces & Documentation worksheet. If you previously selected spreadsheet uploads for Segment I, that selection will appear in red font. You must remove this selection from that worksheet, as part of completing RW Task 518, and document it as part of this task (RW Task 515).*

A new multi-select drop-down column, titled “Florida PALM Spreadsheet Upload Selection(s)” that includes spreadsheet uploads released for Segments I and II, has been added to your agency specific *Current-State Business Processes* worksheet in Smartsheet. Use this drop-down list to indicate your spreadsheet upload selections for each related business process. If no spreadsheet uploads are currently available or are not needed for a specific business process, select the value “None” from the drop-down list.

Update Business Process Documentation

As you are reviewing Segments I and II designs and identifying change impacts, you must update any related agency business process documentation to reflect the changes needed to your people, process, technology, and data for the implementation of Florida PALM. The updates to your business process documentation should describe the nature of the business process change and include all qualitative, quantitative, and source (input/output) change details necessary for your agency’s successful transition to Florida PALM.

As your documentation is being updated, you will indicate the status in the new “*Segments I & II Documentation Status*” column in your agency specific *Current-State Business Processes* worksheet. You will choose from the following drop-down options:

- Updates Not Started
- Updates In Progress
- Updates Complete

How will agencies use this information?

Identifying and documenting business changes and the level of impact will help your agency assess and plan for resource needs to support later readiness activities. You will use the information in this task to complete the following Readiness Workplan Tasks:

- Complete Change Analysis (RW Task 560)
- Inform Role Mapping efforts (RW Tasks 573 and 630)
- Plan and prepare for UAT (RW Tasks 536 and 574)
- Plan for Training (RW Task 568)

What will the Florida PALM Team do with this information?

The Florida PALM team will use this information to gain a broad understanding of agency change impacts.

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

Table 3: Task Completion Rubric

Task Completion Rubric
For all impacted business processes: <ul style="list-style-type: none"> at least one related business process model has been selected; an impact level has been selected for changes to People, Process, Technology, and Data; if the impact level of “Uncertain” is selected, a description of the additional information that is needed to be able to make an assessment has been included in the applicable comment field; an applicable spreadsheet upload or “None” has been selected, and “Updates Complete” has been selected in the Segments I & II Documentation Status column.
All spreadsheet upload needs have been <u>removed</u> from your agency specific <i>Implementation Interfaces & Documentation</i> worksheet.
The Task Tracker has been marked as 100% complete for this Task.

Task Instructions

Review the Segment I and II functional designs and work with your Change Champion Network and functional and technical SMEs to determine your agency’s change impacts. Use the additional columns that have been added to your agency specific *Current-State Business Processes* worksheet to associate your current business processes to their related Florida PALM Business Process Model(s), select the level of impact to your agency’s critical operational elements, and identify future spreadsheet upload needs, if any.

Figure 2: <Agency> Current-State Business Processes worksheet

Smartsheet Navigation:

- Current-State Business Systems is located in:
Florida PALM Workbook for (Agency) > Inventories > Business Processes Inventory
- Implementation Interfaces & Documentation is located in:
Florida PALM Workbook for (Agency) > Inventories > Interface 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 3 above.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps	
1)	<i>Collaborate with your CCN and functional and technical SMEs to understand the designs for Segments I and II and identify changes to your business functions.</i>
2)	<i>For all impacted business processes, identify the related Florida PALM Business Process Model, level of change impact, and any applicable spreadsheet upload you may intend to use for that process in the updated Current-State Business Process Inventory worksheet.</i>
3)	<i>For all impacted business processes, update your process documentation and indicate a complete status in the Segments I & II Documentation Status column.</i>
4)	<i>Remove any previously selected Spreadsheet Uploads for Segment I in the Implementation Interfaces & Documentation worksheet.</i>
5)	<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.</i>
6)	<i>Complete task by April 12, 2024.</i>
7)	<i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
8)	<i>If you have questions regarding this task, participate in the Thursday Task Talk, listen to available Task recordings, or contact your Readiness Coordinator.</i>

Supporting Materials & Resources:

- [Knowledge Center](#)
- [Segments I and II Design Workshops](#) (Business process flows, recordings, presentations)
- [Business Process Models](#)
- [Interface Catalog and the Reports Catalog](#)