Task Instructions

Task ID: 536-A
Task Name: *Create Agency Specific User Acceptance Testing Plan*
Task Start Date: *June 17, 2024*
Task Due Date: *August 16, 2024*
Project Impact: *Indirect*

Task Description

Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes.

536-A: Develop UAT objectives, scope, key activities and roles and responsibilities.

Task Overview

User Acceptance Testing (UAT) will provide the opportunity to complete end-to-end testing of your agency business processes within the Florida PALM testing environment. UAT ensures that agency change impacts to people, processes, technology, and data have been addressed and verified to allow for a successful transition to Florida PALM at go-live in January 2026.

As described in the UAT Approach, all agencies are expected to participate in UAT beginning in April 2025 to prepare for the next major of Florida PALM, which includes implementation of Financials and Payroll Wave and Data Warehouse/Business Intelligence. Given the magnitude of change to be tested and validated and the expectation that all end users are to practice in UAT prior to go-live, agencies will need to develop and execute an agency-specific UAT plan. The objective of a UAT Plan is to document your agency's approach, key activities, and essential resources needed to prepare for and complete UAT.

This task (Task 536) has been separated into three manageable subtasks to allow your agency to gather, add, or update information within your UAT plan as it becomes available through the completion of other readiness tasks or receipt of Project information.

Table 1: 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 identify UAT success criteria.	Oct. 14, 2024 – Dec. 13, 2024

Subtask A Elements

This subtask contains three parts:
1. Review the UAT Approach
2. Begin creating your UAT Plan
   a. Identify agency-specific objectives and scope
   b. Identify key activities
   c. Determine roles and responsibilities
3. Log your UAT questions

Review the UAT Approach

The UAT Approach document provides an overview of expectations for UAT, including the shared responsibility between the Project and agencies. It references the importance of your agency UAT Plan and preparation activities, as well as important roles that will be required for your agency to successfully execute UAT.

Begin Creating your UAT Plan

A UAT Plan template has been provided to support the development of your plan. The following are the components of your UAT Plan that you should begin to create with this subtask.

Identify Agency Specific Objectives and Scope

Agencies are expected to 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.

Beyond the expectations of the Project, you should define your expectations of your agency. Begin identifying your specific objectives and scope of UAT for your agency by considering some basic questions, such as:

- ***What is the objective of UAT and what goals need to be achieved?*** In addition to the overarching objective of testing your agency's end-to-end business processes, these should be critical things that your agency wants to achieve as part of UAT.

- ***What business processes are required to be tested?*** These should be listed in your Business Process Inventory in Smartsheet. Updates to the Inventory should be made for any missing business processes or subprocesses.

- ***Which agency business systems need to be included in UAT?*** These should be agency business systems listed in your Business System Inventory in Smartsheet. Updates to the Inventory should be made for any missing or misidentified systems.

- ***Who needs to be involved and how will they be prepared?*** The UAT Approach includes a list of agency UAT roles and describes the responsibility of each. There may be multiple individuals in each role and there could be some additional roles that need to be filled.

- *What data is needed for testing?* Built upon your Business Process Inventory, User Stories will help agencies identify the various scenarios for testing. There will be new or configured data values that will be essential to provide to end users to help support their testing efforts.

- *What are the risks and potential mitigations that should be documented?* Identified risks should be included on your [Agency] Risks in Smartsheet.

- *How do we want to train our end users on our agency-specific processes?* The UAT activities will be the opportunity to develop and refine the training materials needed to support your agency end users' understanding of how to complete their work in Florida PALM.

Identify Key Activities

Agencies must prepare for UAT by readying their four critical operational elements: people, processes, technology, and data. The UAT Approach provides UAT readiness criteria and related RW tasks to support achieving readiness.

Considering the UAT readiness criteria, described in Table 2 of the UAT Approach document, and your agency-specific objectives and scope, document the key activities that are required to prepare for and execute UAT for your agency. Questions to consider are:

- *What are our space needs (e.g., to support meetings, training)?*
- *Do we have vendor contractual implications that need to be addressed to support testing activities?*
- *What are our testing environment needs (e.g., for agency business system testing)?*
- *Do we have additional staff or contractual support resources necessary?*
- *Do we have budgetary needs beyond current resource availability?*
- *What are the changes (e.g., process, data) that need to be understood by our end users?*
- *Do we have resource contention issues to be able to fully participate in UAT and maintain day-to-day operations?*
- *What are our key risks?*

Determine Roles and Responsibilities

As described in the UAT Approach, the Agency CCN and current support network (e.g., SAM, IDP SME) will generally manage the UAT efforts within the agency. There are some specific, time-bound roles that will need to be assigned to support UAT efforts for the duration of the UAT period: UAT Coordinator and Testing Error Triage Team. Review the roles and responsibilities described in Table 4 in the UAT Approach document and consider the following:

- *Are the right individuals assigned?*
- *Are there enough individuals assigned to the right roles?*
- *What additional roles/responsibilities are needed for our agency?*
- *What do my SMEs need in order to support end users (e.g., additional time to dedicate to testing efforts)?*

NOTE: In subtasks 536-B and 536-C, additional information and instruction will be provided regarding agency UAT planning for the test execution / test management process and for

the scope of the testing activities for your agency. The information in those tasks will allow you to continue to build upon the key activities and roles and responsibilities sections of your UAT plan.

Log UAT Questions

Given the timing and iterative nature of this task, you will likely have questions about UAT that will need to be addressed to fully complete your UAT Plan. A log has been created in Smartsheet to allow you to keep track of your questions for future reference. You will be able to answer your questions as additional information is released from the Project and as you complete future RW tasks or subtasks.

Row ID	Requestor	Question Topic	Question	Status	Comments
001	Jane Doe	Timeline	When will all end users be able to access UAT?	Open	

Figure 1: UAT Question Log

NOTE: This question log serves as a repository of questions for you to revisit as you update your UAT Plan in future tasks. The Project Team will not be directly providing responses for your logged questions.

How will agencies use this information?

Your specific UAT plan is critical to ensure agencies are ready to successfully participate in UAT. This is this first of a multi-step task to develop a thorough agency specific UAT plan. Agencies will continue to build upon this plan with subtasks 536 B and 536 C.

Your UAT Plan will be used to inform the following future tasks:

- 579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants
- 574 – Prepare Documentation for User Acceptance Testing

Additionally, the completion of your agency specific UAT plan is directly correlated to agency UAT readiness criteria. RW Task 539 – Update Agency Readiness Certification Criteria in March 2025 will require agencies to certify readiness to participate in UAT.

Tips:

- *Activities from your Agency Specific UAT Plan should be included in your Agency Specific Implementation Schedule (Tasks 533 and 539).*
- *Agency-specific UAT preparation activities or identified risks and issues related to the planning and execution of UAT should be reported in your Bimonthly Agency Readiness Status Reports.*

What will the Florida PALM Team do with this information?

The Project team will review your UAT Plan and Question Log to facilitate conversations about your agency's UAT approach with your CCN.

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

Table 2: Task Completion Rubric

Task Completion Rubric
Agency's Draft UAT Plan is attached to task 536-A within your Readiness Workplan Task Tracker.
Drafts within the following sections of your Agency UAT Plan have been completed: • Objectives and Scope • Key activities • Roles and Responsibilities
UAT questions have been logged in Smartsheet. *(Note: If you have not identified agency questions related to UAT planning, enter N/A in row 1 of the UAT Question Log.)*
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Begin developing your Agency's UAT Plan through collaboration with key stakeholders and your agency's CCN. Complete the required sections. As you discover questions about UAT that your agency needs to get answered, log them in your UAT Question Log. Attach your Agency's UAT Plan in your Readiness Workplan Task tracker to review as UAT tasks start being released.

Smartsheet Navigation:
- *Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) UAT Planning Questions*
- *Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) Readiness Workplan Task Tracker*

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 2 above.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Collaborate with your Change Champion Network and key stakeholders to begin drafting your agency UAT Plan.*
2) *Log your UAT related questions in Smartsheet.*
3) *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.*
4) *Complete task by **August 16, 2024.***
5) *When complete, attach your plan to the RW Task Tracker, update the Agency Reported Task Progress column, to 100% and save.*
6) *If you have questions regarding this task, participate in the Thursday Task Talk on **Thursday, June 20**, or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- UAT Approach
- UAT Plan Template