

Purpose of UAT

Involving end users in All Agency UAT is critical for ensuring a successful transition to Florida PALM. This participation allows them to:

- Build familiarity with Florida PALM functionality and learn how to use it effectively for their day-to-day operations prior to Go-Live.
- Perform additional testing by exploring a variety of scenarios and exception cases, and assist in improving role-based security.
- Identify areas where process updates, ongoing training, or additional communication may be needed.

The initial two to three weeks of using a new system are often the most challenging. End users will face a steep learning curve when the system goes live unless they have had extensive practice beforehand.

Additionally, because FLAIR will be unavailable during the cutover period, a backlog of work will accumulate and need to be entered into Florida PALM once it is in production. Agencies should be prepared to manage both the learning curve during All Agency UAT and the backlog post Go-Live. **The more time users spend in Florida PALM during All Agency UAT, the more familiar and comfortable they will become with the system.**

Agencies vary greatly in the number of end users who need access to Florida PALM, the types of operational tasks they perform, and their levels of expertise. To help users adjust quickly and build confidence, Agency leadership should be actively involved and provide support during this critical early phase. The Florida PALM IV&V Team offers the following recommendations for Agencies to consider to help support end users during All Agency UAT:

- Implementing processes and mechanisms to monitor and track issue reporting, documentation updates, testing progress, and the outcomes of testing activities.
- Identifying the appropriate staffing requirements and effectively balancing testing tasks alongside everyday duties.
- Developing a tailored training strategy and schedule that fits their unique circumstances and ensures all end users receive adequate training.

Implementing Processes and Mechanisms for UAT

Given the unique nature of each Agency, it is critical that Agencies regularly review and update their UAT plans. Regular evaluation ensures that the testing processes are being implemented as intended. If any aspect of the plan is not functioning properly or does not meet testers' needs, Agencies can and should revise their testing strategies to better support their teams.

To strengthen UAT effectiveness, role-based testing should be directly linked to user stories, ensuring each user executes test scenarios relevant to their assigned role and responsibilities. User stories should be maintained and updated to reflect changes to roles or security permissions, allowing Agencies to keep accurate records as new users are onboarded. **Once users confirm they can perform their tasks in Florida PALM, they will feel more confident and comfortable moving forward.**

When testing issues arise, users should promptly report them to their internal triage teams. These teams are responsible for documenting and assessing each issue to determine which ones require escalation to the Florida PALM Project Team. This organized process ensures that every concern is addressed and that critical issues receive timely and appropriate attention.

Identifying Staffing Requirements and Balancing Tasks

Agencies should encourage their teams to monitor testing efforts by tracking metrics such as the total number of completed tests, the number of testers participating, and the time dedicated to testing. Additionally, leveraging system data such as user logins, login session durations, and completed tasks (e.g., vouchers, encumbrances) can

provide valuable insights. By analyzing these metrics, Agencies can calculate "hours per test case," which helps to make staffing projections more accurate by comparing the total planned test cases against the actual testing effort.

It is important for Agencies to also identify periods of high operational demand, such as year-end processing, to better understand when end users may be less available for testing activities. Testing expectations and schedules should be adjusted during these peak times to accommodate users' primary duties.

Allocating specific times for testing and, when possible, establishing a dedicated testing environment or lab, allows testers to step away from their everyday workspace. This focused setting minimizes distractions, enabling users to concentrate fully on testing tasks and thereby enhancing the overall quality of the testing process.

Developing a Training Strategy

To develop an effective training strategy, Agencies should gather feedback from testers to identify how many repetitions were needed before they felt comfortable performing a process in the new system, as well as the total time spent. **Since many testers are subject matter experts (SMEs), Agencies may choose to multiply their results to estimate targets for typical end users.**

For example, if an SME needed to complete 15 vouchers and spent 10 hours to gain confidence in the process, the Agency might set a target for end users to complete 30 vouchers, which could take as many as 20 hours. Similar analyses should be performed for other processes, such as encumbrances, projects, and inter-unit transactions.

Next, Agencies can use these estimates to calculate the required hours in the system by function for each end user. Using role-mapping assignments, Agencies can determine which staff members will perform specific activities and set targeted training hours for each role. **Since many users will perform multiple functions, the total hours should reflect the sum of all relevant activities.**

To support this process, Agencies could create a planning template to project the monthly training hours needed per user. This template helps define resource allocations for UAT and ensures key operational peak periods are accounted for. **Agencies should consider setting monthly goals based on available personnel and regularly review tester feedback to refine their approach, ensuring that training plans remain practical and aligned with their operational needs.**

Table 1: Example of Allocation of Staff Time Required

Staff	Hours Needed for Proficiency	Allocation Per Month					
		May	Jun	Jul	Aug	Sept	Oct
		25%	5%	5%	25%	25%	15%
End User A	100	25	5	5	25	25	15
End User B	150	37.5	7.5	7.5	37.5	37.5	22.5
End User C	250	62.5	12.5	12.5	62.5	62.5	37.5

Even for Agencies that maintain phased testing approaches, broader exposure can significantly ease adoption. Options include internal demos and walkthroughs conducted by SMEs, live knowledge-sharing sessions, or targeted presentations for managers, leadership, and change champion networks.

Early and repeated exposure to Florida PALM primes future users, reduces anxiety, and builds organizational awareness.