Florida PALM

Planning, Accounting, and Ledger Management

UAT TOPICS AND TIMELINE

JULY 16, 2025

Agenda

▸ Making of a Good SME

▸ Registering and Attending

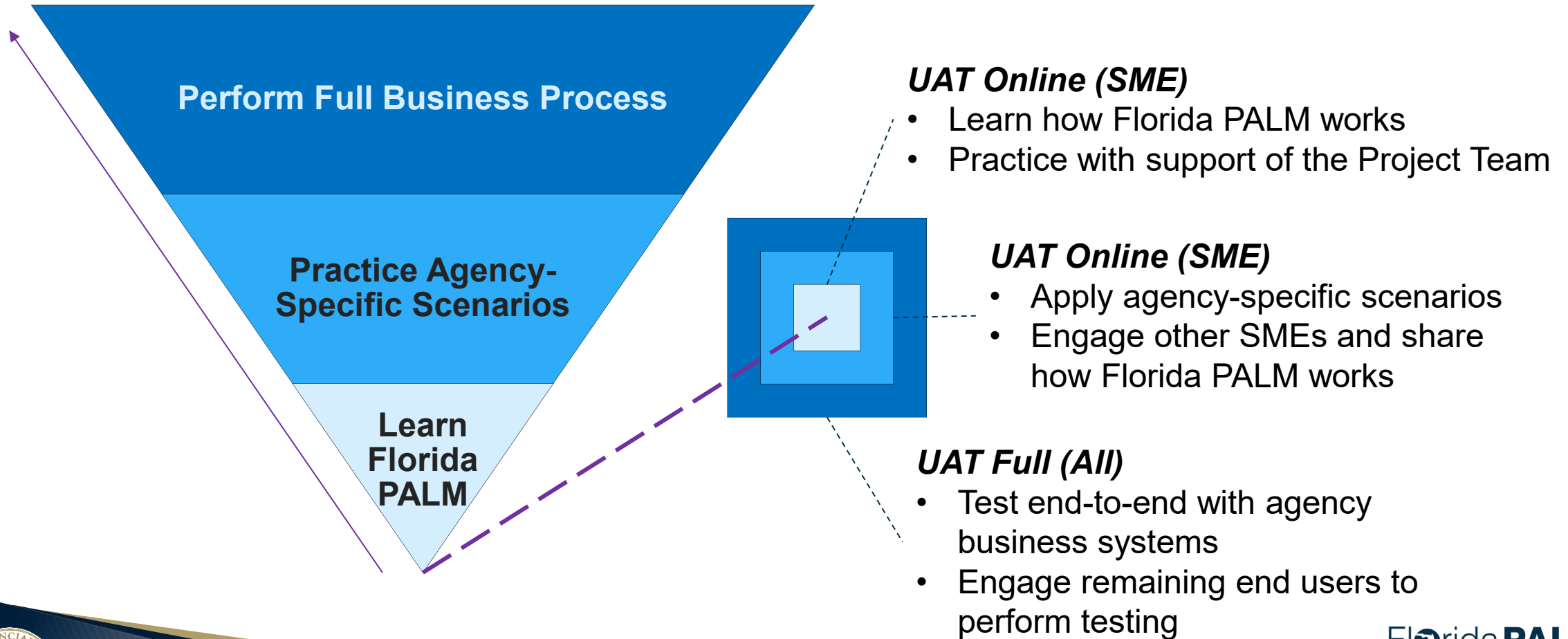▸ Topics by Week

MAKING OF A GOOD SME

Making of a Good SME
Identifying the Right Subject Matter Experts

▸ Subject Matter Experts are individuals who:
- Know your agency and agency processes inside and out (seasoned agency employees)
- Solve complicated problems for your agency
- Lead by example
- Teach other employees how to complete transactions
- Find solutions instead of waiting on solutions

▸ Subject Matter Experts are **not** individuals who:
- Are new to your agency
- Expect/need step-by-step instructions to complete tasks
- Constantly need assistance completing tasks
- Expect others to do things for them

Making of a Good SME
Building a SME's Knowledge

Perform Full Business Process

Practice Agency-Specific Scenarios

Learn Florida PALM

UAT Online (SME)
- Learn how Florida PALM works
- Practice with support of the Project Team

UAT Online (SME)
- Apply agency-specific scenarios
- Engage other SMEs and share how Florida PALM works

UAT Full (All)
- Test end-to-end with agency business systems
- Engage remaining end users to perform testing

REGISTERING AND ATTENDING

Registering and Attending
Getting Registered

▸ Before Registering:

- Must complete prerequisite trainings online
- Training Liaison must confirm completion via UAT Prerequisite Tracker in Smartsheet (releasing soon)

▸ Registering:

- Two in-person attendees per agency, per topic
- Both agency attendees should attend on the same day and registration for both attendees must come from Training Liaison or Agency Liaison
- Online sessions will be open to all SMEs, with two virtual sessions will be planned for each week

Registering and Attending
Being an Attendee

- Project-Provided Materials:
  - Demos and other pre-materials will be provided a week in advance
  - Review and attempt to process transactions before coming to the session, using Process Steps, etc.
- Access to Florida PALM:
  - Participants must have been included in agency role mapping for UAT Online or the agency SAM must have added roles to the users' account
  - Participants must have been included in their agency's IdP setup for UAT
  - Participants should have logged into UAT to confirm access before coming to the in-person session
- Device / Computer:
  - Participants will need to bring their own device with the ability to access your agency's network
  - If using a mobile device, mobile device enablement will need to be established by your agency's IdP
- Work Samples / Transactions:
  - Focus on current year transactions processed from July forward
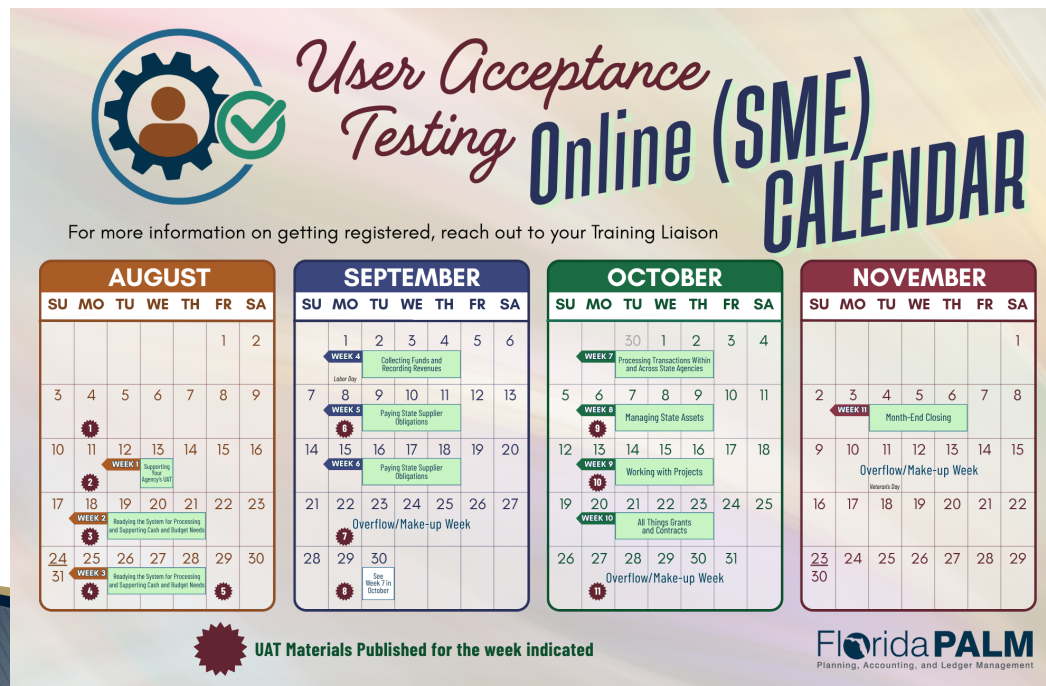 - Complete any pre-work

TOPICS BY WEEK

Topics by Week

- August Sessions:
  - Registration for the Week 1 Workshop and the Weeks 2 & 3 sessions will release on Friday 7/18
  - Pre-Materials will be released on 8/4 and 8/11, respectively
- Registration for remaining sessions will be released in the coming weeks

Topics by Week
What's Not Included in UAT Online

▸ DW/BI Author Capability – expected to be available during UAT on a delayed schedule (date is TBD)

▸ Agency Payroll Functionality – during UAT, payroll testing will be limited to enterprise testing; agency UAT will occur during Full UAT

▸ Fiscal Year-End Closing – will have separate dedicated sessions in March/April

▸ Planned Content During Overflow / Make Up Weeks

Topics by Week
Week 1

Supporting Your Agency's UAT

Logistics:
▸ 8/13 @ the Car Museum
▸ 9am – 4:30pm
▸ Bring Your Laptop!

Attendees:
▸ IdP SMEs
▸ SAMs
▸ UAT Coordinators
▸ Ticket Reporters

Agenda:
▸ SAM Role During UAT vs. Production
▸ Role Changes for SAMs
▸ Maintaining Role Mapping Worksheets
▸ Testing Management

Pre-Materials:
▸ Demo of Credentialing in IAM
▸ Demo of assigning Org Security Rule
▸ Will be available by 8/4

Topics by Week
Weeks 2 & 3

Readying the System for Processing and Supporting Cash and Budget Needs

▸ Topics:
- ◦ Part I: ChartFields and GL Entries
- ◦ Part II: Budgets

▸ Who Should Attend:
- ◦ COA SMEs, including those that will support the PC ChartFields set up
- ◦ Budget SMEs, including those that will support the PC Budget process

Topics by Week
Weeks 4 - 11

▸ Week 4 – **Collecting Funds and Recording Revenues**

▸ Weeks 5 & 6 – **Paying State Supplier Obligations**

▸ Week 7 – **Processing Transactions Within and Across State Agencies**

▸ Week 8 – **Managing State Assets**

▸ Week 9 – **Working with Projects**

▸ Week 10 – **All Things Grants and Contracts**

▸ Week 11 – **Month-End Closing**

CONTACT US

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PROJECT WEBSITE

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KNOWLEDGE CENTER

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