

# FloridaPALM

Planning, Accounting, and Ledger Management



Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting data elements your agency currently uses and how they are being u
01/17/23	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how you currently manage data security and user access.
01/17/23	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Re document each of current systems technical design for each system.
01/17/23	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
01/17/23	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
05/22/23	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
05/22/23	People	Update Authorized Sheet Users	Review, update and confirm authorized users access to all Florida T resources.
05/22/23	N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project, to provide a summary of agency to project impact for the month.
09/11/23	0	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
09/11/23	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
09/11/23	502	N/A	Create Agency Specific Risk and Issues Management Plan
09/11/23	503	People	Create Agency Specific Risk and Issues Management Plan

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

JUNE 20, 2024



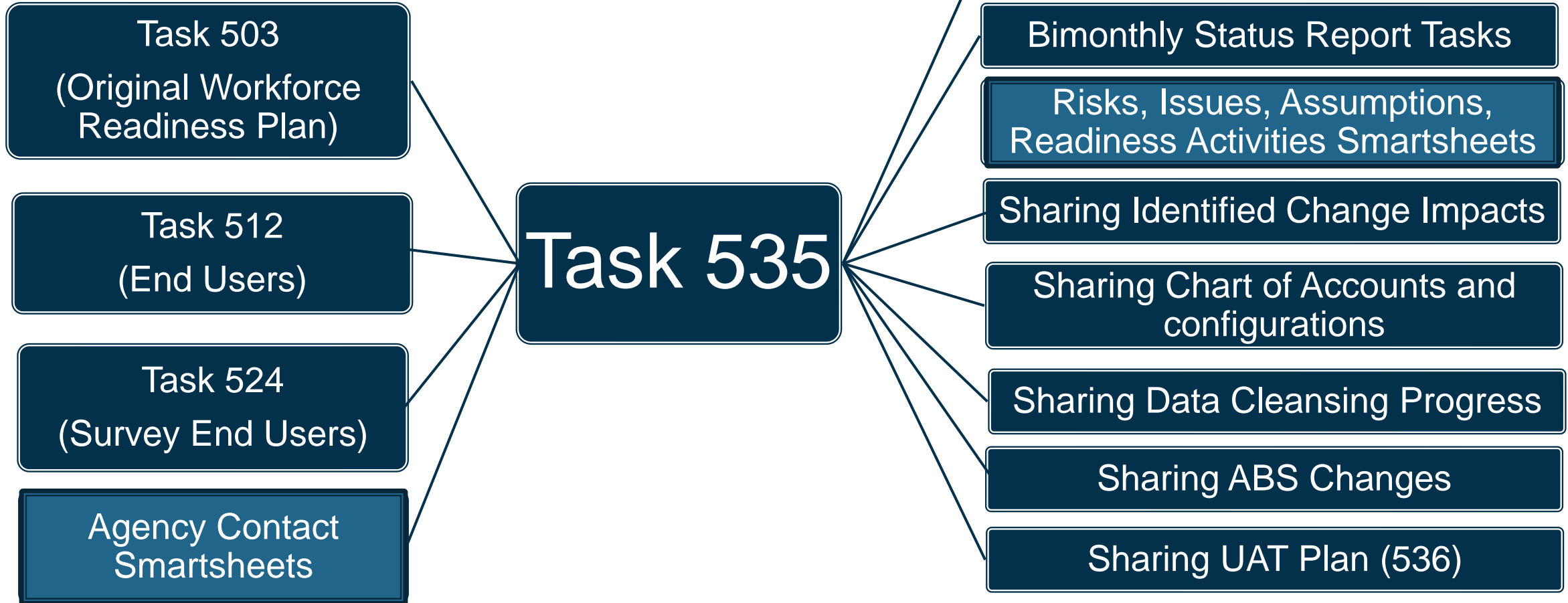
# Agenda

- Task Spotlight
  - Task 535 - Update Workforce Readiness Plan
  - Task 536-A - Create Agency Specific User Acceptance Testing Plan
- Task Reminders
- Questions



# RW Task 535

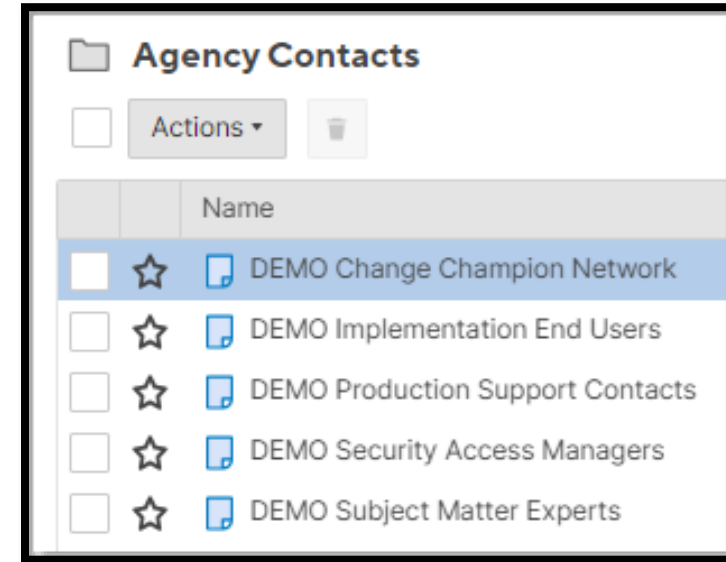
## Update Workforce Readiness Plan



# RW Task 535

## Update Workforce Readiness Plan

- Update Impacted Workforce
  - Key Stakeholders (Direct and Indirect)
  - Location
  - Vacancies
- Update Assessment of Workforce Knowledge and Understanding of Current State
  - Review Task 524 End User Surveys and Analysis

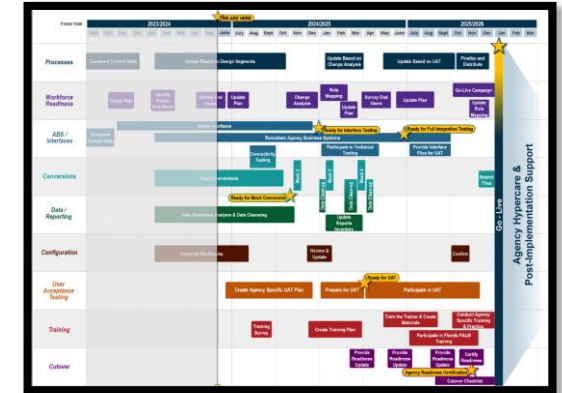


	Project Impact	Critical Operational Element	Task ID	Task Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	People	503	Create Workforce Readiness Plan

# RW Task 535

## Update Workforce Readiness Plan

- ❑ Update and Implement Workforce Readiness Approach
  - ❑ Key activities (See future Tasks)
  - ❑ Communication plan (See PALM Cast Episode #16)
  - ❑ Roles and responsibilities
    - ❑ Designate Workforce Readiness Plan coordinator
    - ❑ Think RACI – Who is responsible for Key activities?
    - ❑ Who regularly review and updates plan?
  - ❑ Timeline
    - ❑ Dates for key activities
    - ❑ Cadence for reviewing plan



Communications Plan							
Project				Project #			
Project Manager				Worksheet Updated			
BSC Category							
ID	Communication	Description / Purpose	Frequency	Distribution Method	Format / Template Used	Owner	Recipient / Attendees
	What type of communication is this? Document Examples: Project Schedule / Status Report / Stakeholder Update Meeting / Steering Committee Meetings / Executive Briefing	What is the description / purpose of this communication?	Examples: Daily Weekly Monthly	Examples: E-mail Meeting Presentation	If App. Example: Status Report Form	Who sends?	Who gets?
1	Monthly Project Status Report	Keep recipients apprised of project status and to manage expectations	Monthly - Last business day of each month	PDF (sent via email)	Status Report Form	PM	Project Team Steering Committee Project Sponsor Agency Management Stakeholders
2	Project Kick-off Meeting	Review project scope, review key elements of the project management plan, introduce sponsors and project team	One-time	Face to face presentation for local team members with webcast for remote team members		PM	Project Team Steering Committee Project Sponsor Agency Management (as appropriate) Stakeholders (as appropriate)





# RW Task 535

## Update Workforce Readiness Plan

- Change summary
  - Date change was made
  - Brief summary of changes
- Agency Sponsor** and additional key stakeholders approve and sign the plan.
- Upload completed Readiness Workplan Task Tracker
- Update Task Tracker to 100%.

### Supporting Materials and Resources:

- [Agency Implementation Roadmap](#)
- Agency Specific End User Readiness Survey Results
- [FL\[DS\]Project Management and Oversight resource page](#)
  - [Communication Plan](#)
  - [RACI Chart](#)
- [Readiness Workplan](#)
- [Task Instructions 503 – Create Workforce Readiness Plan](#)



# RW Task 535

## Update Workforce Readiness Plan

### Task Completion Rubric

Updated Workforce Readiness Plan has been attached to the Task 535 row in the Readiness Workplan Task Tracker.

The Updated Workforce Readiness Plan includes the following updated sections, at a minimum:

- Impacted Workforce
- Assessment of Workforce Knowledge and Understanding of Current State
- Workforce Readiness Approach
- Change Summary

The Updated Workforce Readiness Plan has been signed by the Agency Sponsor with an updated date.

The Task Tracker has been marked as 100% complete for this task.





# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

- ▶ Task divided into 3 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 to identify UAT success criteria.	Oct. 14, 2024 – Dec. 13, 2024

### ➤ Task Elements

- Review UAT Approach
- Begin Creating UAT Plan
- Log UAT Questions

### ➤ Supporting Documentation

- UAT Approach Document
- UAT Plan Template
- UAT Planning Question Log



# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

### UAT Approach

- ▶ All agencies are expected to participate in UAT
- ▶ They will be expected 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
- Reporting needs and solutions

Provide all end users exposure to and practice in Florida PALM

Develop agency-specific end user training and education materials

Confirm agency change impacts to people, processes, technology and data



# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

### UAT Approach

- ▶ UAT will begin in April 2025 with in-person project-hosted sessions with agency SMEs
- ▶ SMEs will be expected to conduct agency-hosted UAT session with end users
- ▶ Full integration testing will begin in July 2025
- ▶ Completion of UAT activities will be included in Agency Readiness Certification, in support of Stage Gate #4 – Agency Readiness



# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

### UAT Approach

#### ► Project Responsibilities

- Initial load of end users and role assignments prior to the start of UAT
- Initial load of agency-specific configuration values, as confirmed by agencies
- Initial load of agency conversion data, based on Mock Conversion 3
- Create access to the UAT environment for all end users with an agency assigned role
- Host UAT sessions for SMEs
- Provide training materials (navigation, process steps) to support SME and end user UAT activities
- Implement a mechanism for agency UAT participants to log and track testing errors
- Provide support during testing activities



# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

Critical Operational Element	Readiness Criteria to Begin UAT (March 2025)	Related RW Tasks
People	<ul style="list-style-type: none"><li>All end users have been assigned end user roles based on job functions.</li><li>UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.</li><li>SMEs have been identified and prepared to participate in UAT.</li></ul>	<ul style="list-style-type: none"><li>536 – Create Agency-Specific User Acceptance Testing Plan</li><li>573 – Complete and Submit End User Role Mapping Worksheet</li><li>579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants</li><li>585 – Update Workforce Readiness Plan</li></ul>
Processes	<ul style="list-style-type: none"><li>Change impacts have been identified for all processes.</li><li>Process documentation has been updated for all processes.</li><li>Agency-specific testing materials including user stories have been developed.</li></ul>	<ul style="list-style-type: none"><li>560 – Submit Change Analysis Tool</li><li>574 – Prepare Documentation for User Acceptance Testing</li><li>580 – Update Agency Business Process Documentation</li></ul>
Technology	<ul style="list-style-type: none"><li>Agency Identity Provider (IDP) has been configured with Florida PALM UAT environment.</li><li>Agency end users have been added to the agency's IDP.</li><li>Agency specific Mock Conversion 3 files have been provided (if any).</li></ul>	<ul style="list-style-type: none"><li>578 – Confirm Identity Provider for Florida PALM</li><li>583 – Participate in Mock Conversion 3</li><li>591 – Confirm IDP Configuration for Florida PALM</li><li>592 – Agency IDP SMEs Add Identified User Acceptance Testing Participants to Agency's Identity Provider</li></ul>
Data	<ul style="list-style-type: none"><li>Agency specific configurations have been confirmed.</li><li>Agency test data has been identified.</li><li>Agency data is cleansed, based on Mock Conversion 2 results.</li><li>Agency has an approach to meet reporting needs.</li></ul>	<ul style="list-style-type: none"><li>567 – Share, Review, and Update Configuration Workbooks</li><li>571 – Complete Data Cleansing Based on Mock Conversion 2</li><li>581 – Update Reports Inventory</li></ul>

# RW Task 536

## Create Agency Specific User Acceptance Testing Plan

### 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.





# Reminder: Tasks Due in June

## June 28

- Task 533 - Manage Agency-specific Implementation Schedule, Risks and Issues
- Task 519 - Remediate Agency Business Systems based on Segment I



# Tips and Reminders

- Both 535 and 536A start with collaboration and reviewing materials.
- Update Task Tracker as you make progress.
- Be prepared to discuss progress at Touchpoints.
- Upload task Documents to your Readiness Workplan Task Tracker.
- Review rubric before you turn in tasks.



# Questions?



# CONTACT INFORMATION

[FLORIDAPALM@MYFLORIDACFO.COM](mailto:FLORIDAPALM@MYFLORIDACFO.COM)

[MYFLORIDACFO.COM/FLORIDAPALM](http://MYFLORIDACFO.COM/FLORIDAPALM)

