

# FloridaP<sup>ALM</sup>

Planning, Accounting, and Ledger Management



Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory document detailing data elements your agency currently uses and how they are being used.
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how your agency manages data security and user access.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the current technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and additional support contacts.
330	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida T resources.
331	N/A	Submit Monthly Agency Health Report	Agency Sponsor to confirm and submit the monthly report, in the Project Health Report, detailing the agency's progress in the project.
332	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
333	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
334	People	Create Webinars Headlines Plan	Create a plan to identify and assess impacted stakeholders within the agency that includes agency specific tasks to successfully implement your agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

DECEMBER 12, 2024



# Agenda

## ➤ New Resources

- Florida PALM Topics and Activities List
- Agency Readiness Certification Criteria

## ➤ Task Spotlight

- 560: Submit Change Analysis Tool
- 564: Update Future Florida PALM End Users
- 536-C: Create Agency Specific User Acceptance Testing Plan
- 568: Create Training Plan for Agency Managed End User Training

## ➤ Reminders

## ➤ Questions



# Readiness Workplan Task Resources

## Business Process Groupings

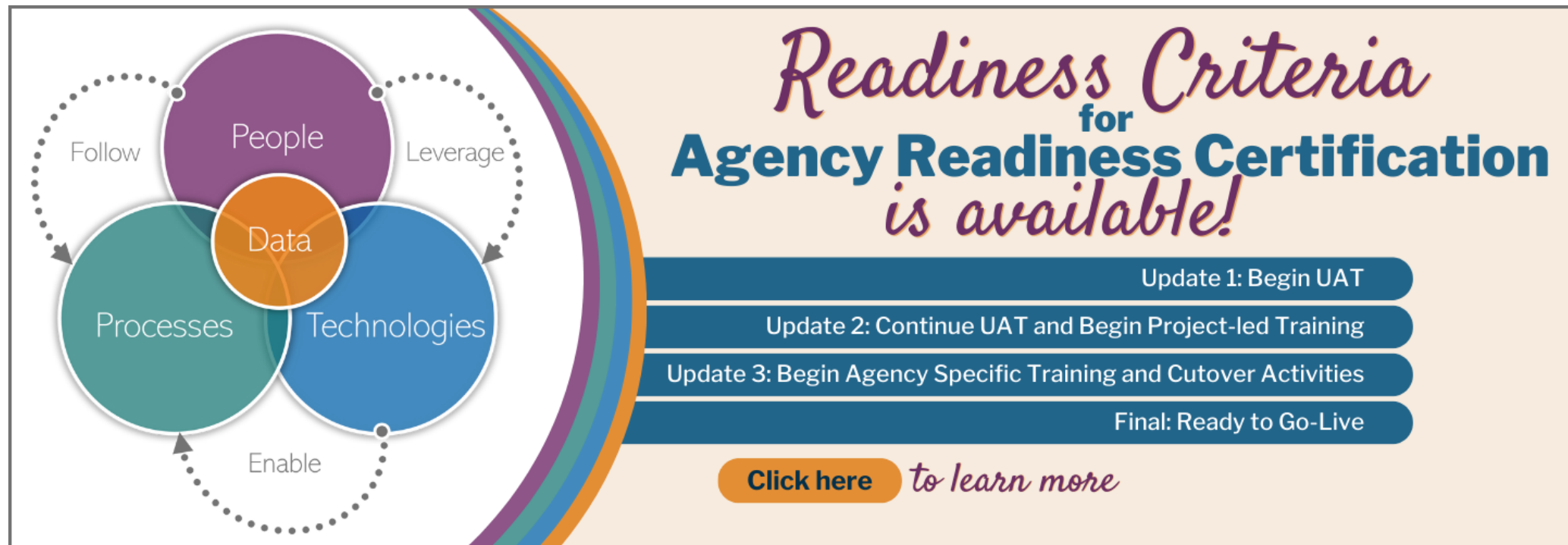


## Topics and Activities

The Topics and Activities list, maintained by the Project within Smartsheet and linked below, serves as the foundation for understanding the functions to be performed in Florida PALM and will support preparation for User Acceptance Testing and Training. It is structured to provide greater details for business process groupings.

# Agency Readiness Certification

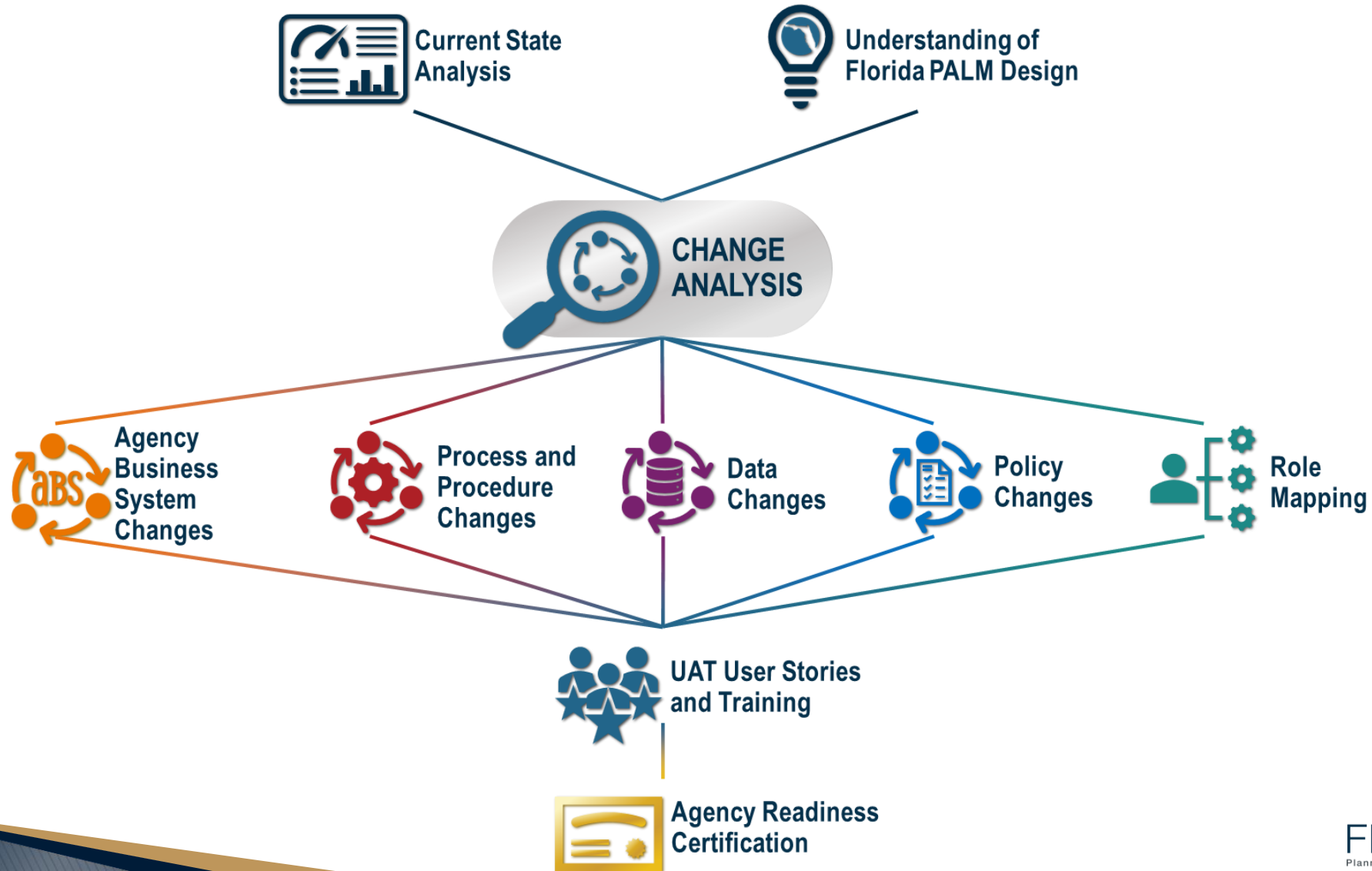
- Agencies will begin providing updates to Agency Readiness Certification in March 2025 with final submission in November 2025





# Path to Agency Readiness Certification

6



# 560: Submit Change Analysis Tool

## Due January 31, 2025

### Task Description:

The purpose of this task is to complete the Change Analysis Tool which will allow you to consolidate, review and update or confirm your identified change impacts.

The Change Analysis Tool will also allow you to pull much of the work you have completed across multiple worksheets (e.g., Current State Business Process Inventory, FLAIR Data Elements Inventory, Florida PALM Interfaces Inventory) into one combined tool.

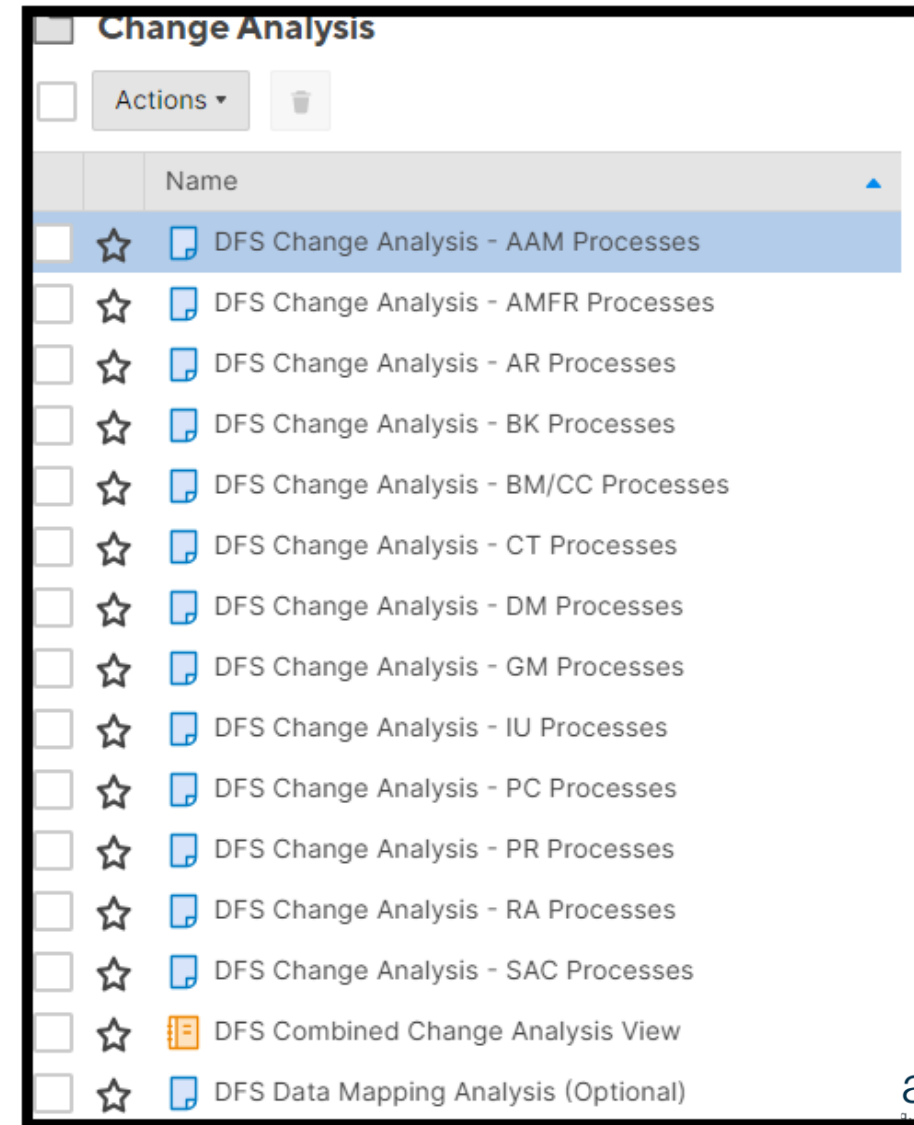
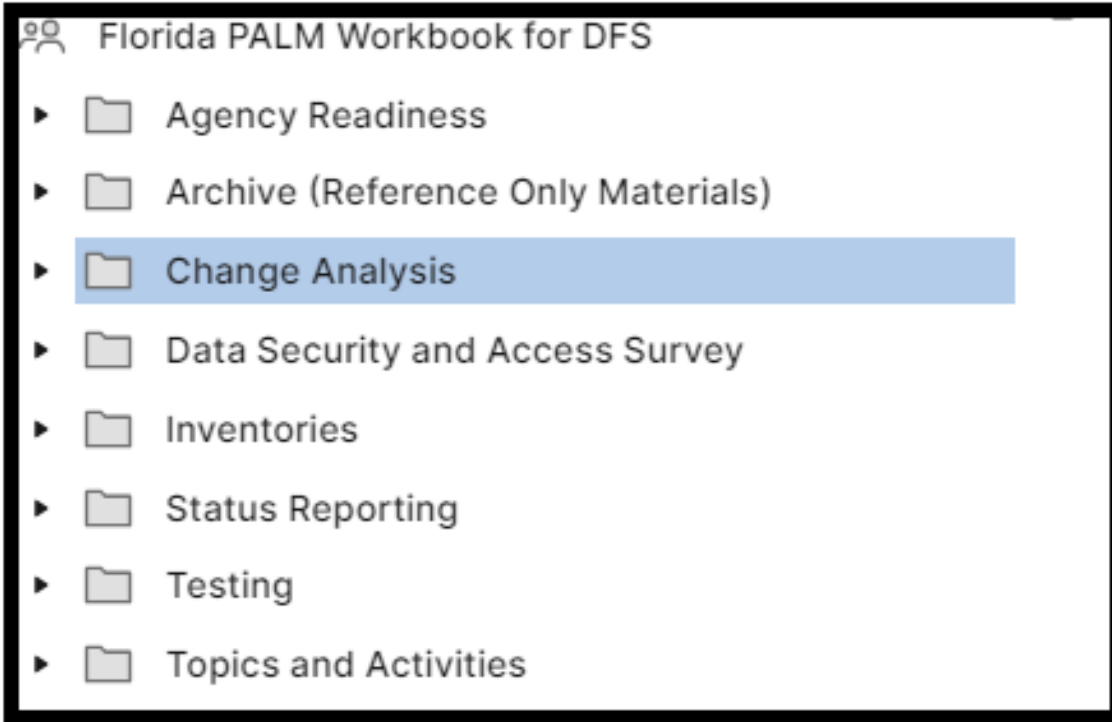
### Task Elements:

- Review the Florida PALM Topics and Activities list
- Complete the Change Analysis Worksheet for each Business Process Grouping (BPG)
- Complete Data Mapping Analysis Worksheet (Optional)



# 560: Submit Change Analysis Tool

## Due January 31, 2025





# 564: Update Future Florida PALM End Users

## Due January 10, 2025

## Task Elements:

- Review and update the Implementation End Users Worksheet
  - Select Business Process Groupings which access is needed for end user job function
  - Select Topics to support role mapping, testing and training activities
    - [Florida PALM Topics & Activities list](#)
  - Complete end user information and required fields

[illegible]

# 536-C: Create Agency Specific User Acceptance Testing Plan **Due January 31, 2025**

## UAT Planning Objectives:

**536-A:** Established testing objectives, key activities, and agency roles & responsibilities

**536-B:** Identified key components of test execution including test management

**536-C:** Confirm business processes to be tested and identify UAT success criteria

## Subtask C Elements:

1. Review the updated UAT Approach
2. Continue developing your UAT Plan:
  - a. Confirmation of Testing Scope
  - b. Identification of Success Criteria
  - c. Mitigation
3. Submit your unanswered UAT questions



# 568: Create Training Plan for Agency Managed End User Training **Due March 28, 2025**

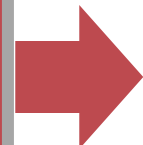
## Readiness Tasks

- RW 560 – Submit Change Analysis Tool
- RW 564 – Update Future Florida PALM Users
- RW 567 – Share, Review, and Update Configuration Workbooks
- RW 573 – Complete and Submit End User Role Mapping Worksheet

## Topics and Activities List

## Agency Knowledge

- Schedule
- Logistics
- Participant Management
- Content Delivery
- Assessment and Evaluation
- Feedback Collection



RW 568  
Create Training Plan for  
Agency Managed End User  
Training

### Elements to Include:

- Overview
- Roles and Responsibilities
- Training Planning and Execution



RW 604  
Create Agency  
Specific Training



RW 625  
Conduct Agency  
Specific Training

# 568: Create Training Plan for Agency Managed End User Training **Due March 28, 2025**

## Task Elements:

- Review the Training Approach Document
- Review the Florida PALM Topics and Activities list
- Complete and submit Task 568 Create Agency Managed Training Plan

## Training Plan (template):

- Overview
- Roles & Responsibilities
- Training Planning and Execution
  - Audience and Participants
  - Logistics
  - Curriculum and Materials
  - Timeline
  - Tracking and Measurement



# Reminder: Upcoming Due Dates

## December 13

- ✓ 547 – Remediate Agency Business Systems based on Segment III
- ✓ 557 – Confirm Interface Inventory for Cycle 2 Interface Testing
- ✓ 567-A-I Share, Review, and Update Configuration Workbooks

## December 27

- ✓ 563 – Manage Agency-specific Implementation Schedule, Risks and Issues



# Questions?





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