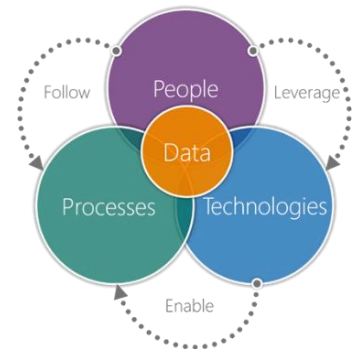


Agency Current-State Analysis Approach

Florida PALM is a business transformation project that will affect every agency’s people, processes, technologies (systems) and data. People follow agency processes by leveraging technology that enables those processes, with data at the core linking each of them. To prepare for your agency specific business transformation and the change that will come with implementing Florida PALM, you must have a solid understanding of your current business practices, including the processes followed, the people involved, the systems engaged, and the data used. None of these elements is more important than the other and gaps in any one can impact the overall success.



During implementation of the Financials and Payroll Waves (i.e., Major Implementation), Project and agency activities will be broken into phases. Each phase will include activities that support not only the Florida PALM solution readiness, but also agency readiness. The planned phases are:

- **Design** – Complete the detailed planning of the system, including conversion decisions
- **Build** – Begin functional creation or configuration of the system and remediation of agency and enterprise business systems
- **Testing** – Complete creation of the system and compare with expected results through an iterative and progressive review process (i.e., test cycles)
- **Training** – Provide practical learning opportunities for users
- **Go-Live Readiness** – Complete and confirm system and user preparedness activities

Current-state analysis activities, aligned to occur during the Design phase, are meant to support your readiness journey by enhancing:

- Agency staff and management’s knowledge and understanding of current practices
- Decision making about business system remediation and process changes
- Documentation that supports scope of effort and resources requirements to execute the changes

Agency Activities

The agency current-state analysis will be completed across multiple Readiness Workplan (RW) tasks. The tasks are designed to guide the review, consideration, and documentation of your agency’s critical data elements, reports, business systems and business processes.

Table 1: Agency RW Tasks

RW Task ID	Task Name	Task Dates
324	Complete FLAIR Data Elements Inventory	12/19/2022 – 03/31/2023
325	Complete Data Security and Access Survey	01/23/2023 – 02/03/2023
326	Update Current-State Agency Business System Inventory and Documentation	03/13/2023 – 10/27/2023
327	Complete Reports Inventory	04/03/2023 – 07/28/2023
328	Document Current Agency Business Processes	07/31/2023 – 12/15/2023

These tasks, occurring during the 2023 calendar year, will be beneficial during future Project phases when:

- Updating your agency business systems
- Identifying change impacts
- Refining agency unique business processes
- Creating agency specific training

While many agencies may have documented processes and agency business system technologies, it is important to take time to review and make sure they are accurate and up to date. Central to the tasks described in greater detail below is the agency business system inventory created by your agency during 2022, as part of RW Task 102. Each of the Tasks includes a link to the inventory and an opportunity to build upon the information previously compiled, including adding payroll systems and processes, which have not previously been included in readiness tasks.

324 – Complete FLAIR Data Elements Inventory

During this task, you will identify and document the FLAIR data elements that are used for tracking and reporting your agency's accounting activity. You will consider, review, and document the following:

- What FLAIR data elements are being used today?
- Who is using (producing and/or consuming) FLAIR data?
- Where and how is the data being used – agency business systems, spreadsheets, databases, reports?
- What are the business objectives for this usage?
- When or how often is the data being used?
- What are key attributes or relationships among data elements or data values?

During this task, you will update your list of Agency Business Systems that contain FLAIR data. You will continue to build upon that list throughout the series of current-state analysis tasks. You may also uncover reports with FLAIR data elements that will later be documented in your Reports Inventory, all of this will help you to complete the task to document your current business processes.

Beyond the current-state analysis, you will use the information captured in your FLAIR Data Elements Inventory during future readiness tasks including interface selection, data configuration for agency-specific values, and data conversions.

325 – Complete Data Security and Access Survey

Data security and access is a critical feature of any system containing sensitive data. Agencies use different methods to limit access to some of their data sets within their agency today. This task requests agencies to identify and document how they are managing data security and end user access for Departmental, Central, PYRL, RDS/NASSAM, IW/MRE/WebFocus, and agency reporting data warehouses (e.g., FLAIR@, FIS). You will consider, review, and document the following:

- How do you grant access?
- What roles have access?
- What is the current number of users?
- Do users have multiple IDs?
- How is data security and access established?

You will use the information you provide in the Data Security and Access Survey in future readiness tasks. These processes should be included when documenting your current-state business processes. You will use this information in conjunction with the Florida PALM design to later determine if your data security and system access processes will require changes for Florida PALM.

326 - Update Current-State Agency Business System Inventory and Documentation

Technology change is a core element of the Florida PALM transformation. You must have a firm understanding and up-to-date documentation of how your agency business systems function and interact with FLAIR and other systems today. This task will require you to validate and update your Agency Business System Inventory, create a Current-State Interface Inventory, and confirm that the technical documentation for each system is current. In your review, you should consider:

- Who are the system owners and users?
- Who maintains the system?
- What information does the system send and/or receive?
- What role does the system play within your agency or externally?
- What is the criticality of the system to your agency?

Through the completion of Florida PALM design activities, your agency will use the information from this task to make decisions and plan for agency business system remediation and future Florida PALM interface needs. In developing your agency business system remediation plan and timeline, you should consider prioritizing agency business systems and data needs that are required at go-live.

327 - Complete Reports Inventory

This task builds upon your FLAIR Data Elements Inventory (RW Task 324), where you identified how your agency uses FLAIR data elements today. For this task, you will compile a list of all the reports your agency produces or consumes that contain those FLAIR data elements and document the following:

- Who runs or receives the report?
- Who or how the report is produced?
- How often is the report generated?
- Why is the report needed?

As part of your current-state analysis, you will use the information from the Reports Inventory to identify your agency's essential reports within your business process documents. Throughout the Florida PALM design activities, this listing will support your determination of which planned reports (e.g., from the Reports Catalog) will meet your data needs, how you will use the future Data Warehouse to meet your reporting or information needs, or where you may need to identify new or supplemental reporting solutions for your data needs.

328 - Document Current Agency Business Processes

This task will require you to confirm that all agency accounting and payroll-related business processes are well documented as well as provide guidance for creating agency-specific user stories. You will consider how work starts, the path (flow) of information, and the downstream implications (i.e., uses or recipients). The documentation should include all processes, the people involved, the technologies engaged, and the critical data that is created or consumed during the process. The user stories will help gather (and engage) the end user perspective when looking across your agency and its processes.

Whether the effort of the Task for your agency will be the creation of business process documents (“we know what we do, we just don’t have it written down”), the update of existing processes (“some of what we do is documented, but we could do more”), or the confirmation of documentation (“our processes are written down and current”), a well-documented set of business processes can answer the following questions:

- Who are key players in the process (e.g., responsible parties, users)?
- When is the process completed (e.g., as needed, annually)?
- What are impacts of the process and on the process (e.g., inputs/outputs, reports, data)?
- What is the sequence of key of events (e.g., required steps, decisions, potential variations) in the process?
- What are the resources (e.g., reports, business systems) that are essential to the process?

Documented business processes and user stories will help your agency prepare for and enable transition to Florida PALM by supporting the identification of change impacts, change discussions with employees, performing user acceptance testing, and creation of internal agency training materials.

Project Current-State Analysis Activities

The Project completed current-state analysis of FLAIR functions through a series of activities including:

- Meeting with every agency for Personalized Agency Working Session in late 2022
- Participating in FLAIR functions and subfunctions sessions with DFS division owners of FLAIR
- Confirming requirements to replace Departmental, Central, PYRL and Information Warehouse functionality, including review with the Advisory Council

The final Business Requirements are to be included in Amendment 8 of the SSI Contract and are planned to be reviewed by the Executive Steering Committee (ESC) by the end of March 2023. Once complete, the Project will move into the Design phase, where business processes and the RICEFW (Reports, Interfaces, Conversions, Extensions, Forms, and Workflows) are finalized.

Beyond the Current-State Analysis Activities

Agencies will complete these current-state analysis tasks during calendar year 2023, while the Project is developing the solution design. Upon completion of the tasks, your agency will have a completely documented analysis of the current state of its accounting, payroll, and reporting activities. It is expected that these tasks are iterative, and agencies will continue to update the documentation beyond the task end date and throughout the Design phase as new information is identified.

The Project plans to provide the design documentation for Florida PALM during 2023 with all designs released by early 2024, including standardized Business Process Models and updated Catalogs of Interface and Conversion Offerings. The Project will develop tools and resources and facilitate workshops to help agencies understand how Florida PALM will function.

There will be future RW Tasks requiring agencies to reference their current-state analysis documentation and compare it to the Florida PALM design documentation and tools to identify change impacts to their people, processes, technology, and data. Agencies will use the identification of change impacts to make decisions regarding business system remediation and process changes. This will also provide agencies with the documentation needed to develop an agency specific transformation plan, including the level of effort and resource needs to execute the transformation in preparation for the successful implementation of Florida PALM.