

Task Instructions

Task ID: 574

Task Name: *Prepare Documentation for User Acceptance Testing*

Task Start Date: *June 2, 2025*

Task Due Date: *August 8, 2025*

Project Impact: *Indirect*

Task Description

Create and prepare User Acceptance Testing user stories and materials.

Task Overview

As described in the [UAT Approach](#), all agencies are expected to participate in User Acceptance Testing (UAT). Agencies will use UAT to:

- Test and validate:
 - updated agency business processes from end to end, including processes that integrate with their agency business systems and other enterprise systems (e.g., STMS, MFMP);
 - business system remediation (where applicable);
 - end user role assignments;
 - agency-specific configurations; and
 - reporting needs and solutions.
- Develop agency-specific end user training and education materials.
- Provide all end users exposure to, and practice in, Florida PALM.
- Confirm agency change impacts to people, processes, technology and data.

Agencies previously developed their UAT Plan (RW Task 536) documenting testing objectives, scope, key activities, roles and responsibilities, and key components of testing execution and testing management. Agency UAT plans should also include the identification of the business processes that must be tested and UAT success criteria. Agencies have also identified the Subject Matter Experts (SMEs) that will participate in UAT Online (RW Task 579) and have begun assigning end user roles to those SMEs (RW Task 573-A).

UAT SMEs must be well equipped to participate in testing activities. They will require support materials to successfully complete transactions and processes in Florida PALM. **Development of UAT materials is a responsibility of both the agency and the Project.** The Project will provide basic testing materials during UAT Online. The Project-provided UAT materials will continue to be available to agencies and their end users to support UAT Full sessions. Project-provided UAT materials will include step-by-step instructions to complete processes in Florida PALM and how to navigate in Florida PALM. They will be made available in the Knowledge Center and may also include related screenshots and will align with the items in the [Topics and Activities](#) listing.

In addition to Project-provided testing materials, agencies must create user stories, documenting all business processes that must be tested. Agencies may also need to create additional agency-specific materials to support SME testing activities such as crosswalks of new Chart of Account values and agency-specific configurations (e.g., SpeedKeys). Testing participants are expected

to perform their work in UAT. In order to do so, agencies must save sample transactions (e.g., invoices, deposits, transfers) beginning in July 2025.

Together, with the Project provided Florida PALM transaction process steps and the agency provided user stories, transaction source material (e.g., invoice examples) and transaction data (e.g., COA values) provide UAT SMEs the information required to complete testing activities in UAT. This task (RW Task 574) requires the development of materials for UAT SMEs during UAT Online. A future task (RW Task 663) will require agencies to refine and update UAT Materials as needed for end users during UAT Full.

Task Elements

This task contains three parts:

1. Create user stories for all processes that must be tested in UAT.
2. Develop or collect UAT support materials.
3. Create an inventory of testing materials.

Create User Stories

User stories should be developed for every business process your agency expects to test during UAT. There are several resources available to support the identification of the user stories you should create for UAT. Use one or more of the following resources to create an inventory of user stories to be developed.

- **Agency UAT Plan** (RW Task 536) – Your agency-specific UAT plan should include the required processes to be tested for your agency.
- **Change Analysis Tool** (RW Task 560) – You should have confirmed all Florida PALM functions or activities your agency will perform in your agency's Change Analysis Tool.
 - Use the *<Agency> Combined Change Analysis View* report to view all identified activities your agency will perform in Florida PALM in a single report. The report also provides related information for each activity including related end user roles, related reports, related spreadsheet uploads (if applicable), related agency business systems and interfaces (if applicable), and documented change impacts.
- **Topics and Activities List** – The Project-provided Topics and Activities List serves as the foundation for understanding the functions to be performed in Florida PALM.

For every activity or function that your agency will complete in Florida PALM, consider all the variations of the Activity. For the Activity of Entering a Voucher Manually, you may indicate the following scenarios for user stories:

- Input an Encumbered Voucher
- Input an Unencumbered Voucher
- Input a Settlement Agreement Voucher
- Input a Voucher to be Paid Via Wire
- Update a Denied Voucher
- Remove a Denied Voucher
- Input a Voucher with a Project ID
- Input a Voucher with Split Funding
- Input a Voucher that will Exceed Available Budget

Next, begin developing at least one user story for each process or Activity to be tested. A user story is not a test script, rather it is a description of a single unit of work often within a larger business process. It includes a role (who), the activity being performed (what), and the reason for the activity (why).

NOTE: *One is the minimum required user story for each Activity, as some Activities are very narrow in scope, but most Disbursement Management Activities have vast variations, as described above.*

Some examples of user stories are:

- As an Accounting Specialist in Disbursements (who), I want to process a City of Tallahassee utility bill (what) so that we may pay the invoice to meet prompt payment law (why).
- As an Asset Custodian (who), I want to update the location of a tagged piece of equipment (what) to reflect the transfer from one assigned user to another (why).
- As an Accountant III in Revenue (who), I want to process a transfer of revenues between two of our agency trust funds (what) so the agency can record the receipt of funds into the proper fund (why).

Helpful considerations when developing user stories:

- You should develop a user story for every variation of the process or activity.
- A user story can be tested multiple times (e.g., with different vendors or invoice periods), by one or more end users, that fit the variation.
- Be sure to consider the differences in the way processes are completed across the different divisions within your agency.
- All critical processes for your agency should be included.
- Include user stories for all planned roles, including the agency Security Access Manager (SAM).
- Asking SMEs and end users to provide variation examples, is a great way to gather examples.
- Include additional variations over time, especially during UAT.

To support agency scenario identification efforts, the Project is working with DFS Division of Accounting and Auditing and Division of Treasury to establish a set of recommended standard business process scenarios that would be applicable for all agencies. The list will be aligned with the Topics and Activities list (e.g., associated with the applicable Activity) and will be published and shared with agencies later in June.

Develop or Collect UAT Support Materials

In addition to the Project-provided process steps and the agency-developed user stories, testers will need some additional information in order to be able to successfully transact during UAT. Specifically, testers will need to know or have access to resources that provide available values for processing within Florida PALM (e.g., data elements such as ChartField values) and may also need sample source materials, such as vendor invoice copies, to test.

Available Data Values

For most of the agency UAT testers (SMEs and end users), UAT will be their first exposure to Florida PALM data. They have built extensive familiarity with FLAIR codes and concepts, such as the 29-digit account code and Expansion Options, to allow them to successfully process transactions or understand reports. The first hurdle on the end users' learning curve for Florida PALM are data codes.

The agency should provide accessible lists for end user use that includes information on valid agency data codes, such as ChartField values, SpeedKeys, and Location IDs. These are all values that have been provided, reviewed, or validated as part of your agency's conversion and configuration tasks. Your agency's Configuration Workbook Inventory and Conversion Inventory in Smartsheet include lists of values, mappings of FLAIR to Florida PALM values, and other information that can support end users processing within Florida PALM during UAT. Within your agency's Secure File Share on the Florida PALM SharePoint site are also conversion results that include information on converted encumbrances and a supplier crosswalk showing the FLAIR vendor codes converted to Florida PALM suppliers.

Agencies should consider the learning needs of their end users when determining the appropriate information to provide and in what format. Whether it's a simple list that crosswalks the FLAIR Object Code users once used to the Florida PALM Account value or access to full lists of configured values, both options support agency users in their testing efforts.

Source Material Samples

For some business processes, end users will benefit from having sample source materials to support their processing of their day-to-day functions in Florida PALM. These processes are ones that originate or are impacted by data or information that is outside of FLAIR. Examples of source material includes vendor invoices, agency budget allotment spreadsheets, grant awards, and deposits.

As part of this RW Task, agencies should encourage agency testers to gather documents that they use in their day-to-day functions to support their testing activities. For SMEs participating in UAT Online, they should include source materials they use after the July 1 (the Mock 3 Conversion Run Date) while end users participating in UAT Full should include source materials they use after the October 11 (the Mock 4 Conversion Run Date). Older source materials may still be valuable resources, especially if they represent processes or examples that are less frequently encountered, but still important to test.

Create an Inventory of Testing Materials

You may choose how your agency will inventory and track your user story development and the format in which your user stories are developed. Sample user story templates have been provided in the Supporting Materials and Resources section below. You should choose the format that works best based on your agency's UAT management and execution approach. Three different inventory options are described below.

Inventory Option #1 – Change Analysis Tool

If you have completed the Change Analysis Tool (RW Task 560), then you have already identified all the activities you will perform in Florida PALM. Based on the confirmation of the Florida PALM Activity, the Change Analysis Tool provides opportunity to identify additional details related to that

activity such as related reports, related interfaces or spreadsheet uploads and even auto-populates with the related end user roles for those activities. All this information can be very helpful in the development of user stories and an assurance to your agency that you're testing a complete set of agency business processes.

A few new columns have been added to your Change Analysis Tool worksheets, as shown in Figure 1 below.

Automation Forms Connections Dynamic View DEMO Change Analysis - DM Processes ☆

Grid View Filter Off Arial 10 B I U S A

| Support Materials | End User Role | User Story ID | User Story Title/Testing Scenario | Activity | Do You or Will You Perform this Activity? | Activity Outside of Florida PALM (Optional) | Topic | Related Florida PALM Business Process/Subprocess | Current-State Business Processes |
|-------------------|---------------|---------------|--|-----------------------------|---|---|--------------------|--|----------------------------------|
| | | 1 | Input Monthly Cell Phone Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |
| | | 1.1 | Update Denied Monthly Cell Phone Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |
| | | 1.2 | Remove Denied Monthly Cell Phone Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |
| | | 1.3 | Input Monthly Copier Lease Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |
| | | 1.4 | Update Denied Monthly Copier Lease Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |
| | | 1.5 | Remove Denied Monthly Copier Lease Invoice | Entering a Voucher Manually | Yes | | Processing Voucher | 30.3.1 Process Vouchers | Managing Payroll Process Voucher |

Figure 1: Updated Change Analysis Worksheet with Example User Stories

- **Support Materials Column** – (Required if you choose this inventory option) Use this column to identify what support materials have been developed for the user story.
 - List or describe the information that will be needed by the end user to test the scenario.
 - If no supporting material or information is needed, indicate N/A.
 - You may choose to attach developed support materials to the row.
- **End User Role column** – Use this column to identify the end user role required to complete the user story.
 - View the related end user role(s) column that is auto-populated based on the confirmed Activity, and then narrow down to the end user role specific for that user story.
- **User Story ID Column** – (Required if you choose this inventory option) Use this column to assign a unique identifier to each user story.
- **User Story Title/Testing Scenario Column** – (Required if you choose this inventory option) Use this column to name the user story or the scenario for the user story, which is typically the variation of the activity of which you need to test.

Prior to adding user story information, first review your Change Analysis Tool to confirm the Activities you will complete in Florida PALM. Make updates as necessary. You can also review

the <Agency> CA Selections report to for identification of any Activity selection errors in your Change Analysis Tool. Error messages include the following:

- *Activity not selected from Activity dropdown* – This error is most common when a new Activity has been added to the Topics and Activity list but has not yet been added to your Change Analysis Tool. To clear this error, you must add the Activity to the appropriate Change Analysis worksheet and confirm if this Activity will or will not be completed in Florida PALM.
- *Selected Activity no longer valid – Remove or Edit Activity selection* – This error is most common when a change has been made to an Activity (e.g., the Activity has been removed or renamed) in the Topics and Activities list that was already selected in your Change Analysis Tool. To clear this error, you must:
 - remove the Activity from your Change Analysis Tool selection; or
 - update the selection to the correct activity name.

NOTE: *Some Activities may warrant multiple user stories, due to the variations typically found in day-to-day or periodic processes. As shown in Figure 1, for multiple variations, duplicate the Activity row as many times as needed for that Activity.*

Update the new columns in each Change Analysis Worksheet for each Business Process Grouping. The new columns have also been added to your <Agency> Combined Change Analysis View report which provides a consolidated view or inventory of all relevant activities/testing scenarios from all Change Analysis Tool worksheets.

Inventory Option #2 – User Story Inventory Worksheet

A *User Story Inventory* worksheet has been added to the Testing Folder in your agency workspace in Smartsheet, shown below in Figure 2. This worksheet may be used to document each UAT user story. You may also attach supporting materials for each user story in this worksheet.

NOTE: *This worksheet is not connected to any other worksheets or source sheets and requires manual completion for all columns.*

Figure 2: Sample User Story Inventory with Example User Stories

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Inventory Option #3 – Agency Developed Inventory Outside of Smartsheet

You may choose to track and inventory your user stories and testing materials in a different format that better suits your agency's UAT plan and approach. If you choose to inventory your testing materials outside of the Project provided options in Smartsheet, you must include the following information at a minimum:

- A description of the supporting materials required to execute the user story,
- The associated Activity from the Topic and Activities list, and
- A unique identifier such as a user story title or testing scenario.

If you choose to create an agency unique inventory for your testing materials, you must provide the completed inventory upon submission of this RW task by attaching the document to the task row in your RW Task Tracker. An example of an agency-developed inventory has been shared by Department of Children and Families ([DCF User Stories \(WIP\)](#)) and has been published to the Agency Exchange Library.

How will agencies use this information?

Agencies will provide the developed user stories and testing materials to UAT participants during the execution of UAT. Participants will use the materials to test and validate that the agency can perform necessary business functions in Florida PALM. Agencies will use their User Story Inventory to track and report testing progress.

This task has a direct correlation with the following criteria from Agency Readiness Certification #1 which will be submitted in July 2025 (RW Task 593).

- Creation of at least 75% of the Project-recommended standard UAT scenarios.

You will also use the information in this task to complete the following Readiness Workplan Tasks:

- Update UAT Documentation (RW Task 663)
- Submit Monthly Progress Report – Testing during UAT Online (RW Tasks 660, 664, 665, and 667)

What will the Florida PALM Team do with this information?

The Project team will review your task submission based on the following criteria to confirm completion:

Table1: Task Completion Rubric

| Task Completion Rubric |
|---|
| Agency has completed an inventory of user stories and testing materials that includes all testing scenarios and required fields using one of the following: <ul style="list-style-type: none"> • Option 1: Change Analysis Tool • Option 2: User Story Inventory worksheet • Option 3: Agency-specific format, attached to RW Task Tracker |
| Agency has confirmed user stories and necessary testing materials have been developed for each of the Project-provided standard testing scenarios. The agency will not be required to submit user stories themselves but must provide counts and information about the testing scenarios. |

Task Instructions

Confirm the processes that your agency must test and validate during UAT and determine the best approach for material development and tracking within your agency. Create user stories for all agency required business processes and testing scenarios. Develop supporting testing materials for end users, providing the necessary data and sample transactions to support the execution of the user story. Create a testing materials inventory, identifying all testing scenarios. Upon release of the Project-provided standard testing scenarios, review and confirm that user stories and related testing materials have been developed for all required scenarios. Update your testing materials and inventory, if needed.

Work with your agency's Business Liaison and UAT SMEs to coordinate completion of this task.

Smartsheet Navigation:

- Option 1 – *Florida PALM Workbook for (Agency) > Change Analysis folder*
- Option 2 – *Florida PALM Workbook for (Agency) > Testing > User Story Inventory*

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 1 above.

Table 2: Summary of Task Completion Steps

| Summary of Task Completion Steps | |
|----------------------------------|--|
| 1) | Create user stories for all testing scenarios required by your agency. |
| 2) | Develop or collect UAT support materials. |
| 3) | Create an inventory to list test scenarios and track all testing materials. |
| 4) | Review and confirm that all Project-Provided standard test scenarios have been captured in your testing materials inventory. |
| 5) | Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team. |
| 6) | Complete task by August 8, 2025 . |
| 7) | When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save. |
| 8) | If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator. |

Supporting Materials & Resources:

- [UAT User Stories CoLab](#)
 - [User Story - Template](#)
 - [User Stories Worksheet](#)
- [DCF User Stories \(WIP\)](#) (shared in Agency Exchange Library)
- [User Acceptance Testing Approach](#)