This guidance is applicable for agencies that have chosen to document and track user stories within the Change Analysis Tool.

Change Analysis Worksheet for Progress Reporting Supplemental

Agencies have created user stories that document all applicable activities that must be tested during All Agency UAT (previous RW Task 574). The task provided three different options for agencies to choose from when creating their User Story Inventory.

- Inventory Option #1 – Change Analysis Tool
- Inventory Option #2 – User Story Inventory Worksheet
- Inventory Option #3 – Agency Developed Inventory Outside of Smartsheet

Throughout All Agency UAT, agencies must track and report the progress of completing user stories in UAT. **Agencies that chose to document User Stories within the Change Analysis Tool (Option #1) will continue to use the Change Analysis Tool to report testing progress.**

NOTE: If you need to change your agency user story inventory option, please contact your Readiness Coordinator.

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Change Analysis

Worksheet Instructions

The *<Agency> Change Analysis - <BPG> Processes* worksheets previously provided for RW Tasks 560 and 574 have been modified to include new columns to report testing activity. Any data previously added by your agency has not been edited or altered.

The information below describes the columns in the *<Agency> Change Analysis - <BPG> Processes* worksheets and provides instructions on how to complete the worksheet.

User Story Inventory Section – Required for Monthly Progress Reporting
- **Error Messages** (locked from editing) – Review any error messages and take action to resolve. This column is updated via overnight processing.
- **User Story ID** (Required) – Provide a unique identifier for your user story.
- **User Story Title/Testing Scenario** (Required) – 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.
- **Activity** (Required)
  - o Select a related Florida PALM activity from the Topics and Activity list.
  - o Select 'Agency Defined' if it is an agency defined activity that does not appear on the Topics and Activity list.
- **Project Recommended Standard Activity** (locked from editing) – Auto-populated to indicate whether or not the activity is a Project Recommended Standard Activity.
- **Do You or Will You Perform this Activity?** (Required for all activities)
  - o Select "Yes" or "No" on whether or not your agency performs or will perform that activity in Florida PALM (i.e., it's a business process that your agency utilizes).

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- ▪ If "Yes is selected, you must provide all the required information for that activity by completing all required columns.
- ▪ If "No" is selected, no additional information is required for that activity.
- **Activity Outside of Florida PALM** (Optional)
  - o Provide the title of the related activity if you have a related activity that occurs outside of the Florida PALM system. These related activities often occur before or after the Florida PALM Activity.
    - ▪ Examples include activities that occur in an Enterprise System or Agency Business System or manual processes such as printing and distributing paper reports.
- **Topic** (locked from editing)
  - o Auto populated to indicate the Topic related to the selected Activity.

Testing Progress Section – Required for Monthly Progress Reporting
- **Planned Number of Tests** (Required)
  - o This column is locked from editing, and the number is auto populated from the 'Planned Number of Tests for Next Month' column.
  - o If the activity is new, the number will default to '0'.
- **Actual Number of Tests** (Required)
  - o Indicate the number of tests that actually occurred for each unique activity for the month.
    - ▪ Enter '0' if no tests were conducted for the month.
  - o 'N/A' is <u>only</u> an option for <u>activities that are not applicable</u> for your agency, as indicated by a 'No' in the "Do You or Will You Perform this Activity" column.
- **Performance Outcome** (Required)
  - o Indicate a rating for the overall outcome of testing for each unique activity for the entire month.
  - o Drop-down options include
    - ▪ Above Expectations – Select this option if testing of the activity has been successful and exceeded your expectations, with little to no room for improvement.
    - ▪ Satisfactory – Select this option if testing of the activity has executed as planned. There may still be room for process improvements, minor remediations, and/or training opportunities.
    - ▪ Inadequate – Select this option if testing did not go as well as expected and many improvements are required.
    - ▪ N/A – Select this option of no testing was completed for the month.
- **Performance Outcome Comments** - This field is used to provide context to the rating assigned in the "Performance Outcome" column. (Required only if 'Inadequate' was selected in the "Performance Outcome" column.)
  - o Provide context to the assigned rating in the "Performance Outcome" column.
  - o If 'Inadequate' was selected as the Performance Outcome, explain the challenges experienced during testing and any planned action to improve future testing.
- **Planned Number of Tests for Next Month** (Required)

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- Indicate the number of tests you plan to conduct for each unique activity for the following month.
  - Enter '0' if no tests are planned for the following month.
- 'N/A' is only an option for activities that are not applicable for your agency, as indicated by a 'No' in the "Do You or Will You Perform this Activity" column.

Additional User Story Details/Change Analysis Section – Not required for Monthly Progress Reporting

- **Agency Defined End User Role** – Identify all the Florida PALM end user roles required to complete the user story.
- **Related End User Role(s)** (Locked from editing) – Auto-populated to indicate the related Florida PALM End User roles related to the activity.
- **Support Materials** – Identify all supporting materials developed for the user story.
- **Related Florida PALM Business Process/Subprocess** (locked from editing) – Auto populated to indicate the related Florida PALM Business Process/Subprocess related to the activity.
- **Current-State Business Processes**
  - Select the related current-state business process(es) for each Activity that your agency performs.
  - If the Activity is not completed in any of the current state business processes, select N/A.
- **Current-State Business Subprocess**
  - Select the related current-state business subprocess(es) for each Activity that your agency performs.
  - If the Activity is not completed in any of the current state business subprocess, select N/A.

NOTE: If a current state business process or subprocess is missing from the drop-down list, add the correction in the <Agency> Current-State Business Processes worksheet in the Business Process and/or Business Subprocess column(s). The updates will appear in the drop-down options for these columns after overnight processing.

- **Division, Office, Bureau, or Unit** – Identify the entity within your agency where the activity is performed.

NOTE: If a Division, Office, Bureau, or Unit is missing, make the update in the <Agency> Role Mapping worksheet. The updates will appear in the drop-down options for this column after overnight processing.

- **Types of Changes**
  - Select the type(s) of change that will be occurring for that activity.
  - Drop-down options include:
    - Documentation Change
    - End User Change
    - Policy Change
    - Procedure Change

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- ▪ System Change
- ▪ N/A
- **Describe the Process Change** – Summarize the process changes occurring.
- **Describe the People Change** – Summarize the people changes occurring.
- **Related Florida PALM Spreadsheet Upload(s)**
  - o Select the related Florida PALM Spreadsheet Upload(s) that will be used with the Activity.
  - o Select N/A if no Florida PALM Spreadsheet Uploads will be used.

NOTE: If a Florida PALM Spreadsheet Upload is missing, add the correction in the <Agency> Current-State Business Processes worksheet. The updates will appear in the drop-down options for this column after overnight processing.

- **Related Florida PALM Report(s)**
  - o Select the related Florida PALM reports your agency will need to use with the activity.
  - o The drop-down options include all Florida PALM reports available for the BPG.
- **Describe the Data Change** – Summarize the data changes occurring.
- **Related Agency Business Systems**
  - o Select the related agency business systems that will be used with the activity.
  - o Select N/A if the activity does not use any related agency business systems.

NOTE: If an agency business system is missing, add the agency business system in the <Agency> Current-State Business Systems worksheet. The updates will appear in the drop-down options for this column after overnight processing.

- **Related Florida PALM Interfaces**
  - o Select the related Florida PALM interfaces that will be used with the activity.
  - o The drop-down options include all interfaces approved for your agency.
- **Describe the Technology Change** – Summarize the technology changes occurring.
- **Comments** – Use this field optionally for internal purposes.

Additional Change Analysis Tool Resources

The following resources and reports are available within your agency's Change Analysis Tool folder in Smartsheet to support the completion of your agency's Change Analysis. These resources are not required for monthly progress reporting.

<Agency> Data Mapping Analysis

The *<Agency> Data Mapping Analysis* worksheet contains all the data elements from your *<Agency> FLAIR Data Elements* worksheet with a selection of "Yes", "Undetermined", or left blank in the *Continued Use* column. The *<Agency> Data Mapping Analysis* worksheet is optional but is highly encouraged so that your agency can test and validate the critical data sources needed for agency reporting is available in Florida PALM. Refer to RW Task 560 - Submit Change Analysis Tool Task Instructions for steps to complete this worksheet.

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<Agency> Combined Change Analysis View Report

The *<Agency> Combined Change Analysis View* Report pulls together all activities that are indicated as applicable for your agency across all *<Agency> Change Analysis - <BPG> Processes* worksheets into a single report for a consolidated view.

<Agency> CA Selections as of (XX/XX/XXXX@X:XX:XX AM/PM)

The *<Agency CA Selections* report compares your Change Analysis worksheets to the Topics and Activities list. The report provides the following:

- BPG
- Activity Name
- Topic Name
- Your agency's selection for "Do You or Will You Perform this Activity"
- Error messages indicating there are missing activities or invalid activities within your Change Analysis worksheets

Review the Error Message column to address any errors in the individual corresponding *<Agency> Change Analysis - <BPG> Processes* worksheet. The title of the worksheet will let you know when it was last updated.