

## Task Instructions

Task ID: 512

Task Name: *Identify Future Florida PALM End Users*

Task Start Date: *January 16, 2024*

Task Updated Date: *February 19, 2024*

Task Due Date: *March 1, 2024*

## Task Description

Submit list of all agency end users who will need access to Florida PALM at implementation.

## Task Overview

Florida PALM is a statewide business transformation that requires each agency to plan and execute activities necessary to ready their agency across the four critical operational elements: people, processes, technology, and data. This task focuses on people. Your agency cannot successfully transition to Florida PALM if your end users are not ready. To successfully ready your people and follow the change management expectations (Figure 1) described in the [Implementation Timeline and Agency Activities](#), agencies must focus on those most directly impacted by the change: the end users.

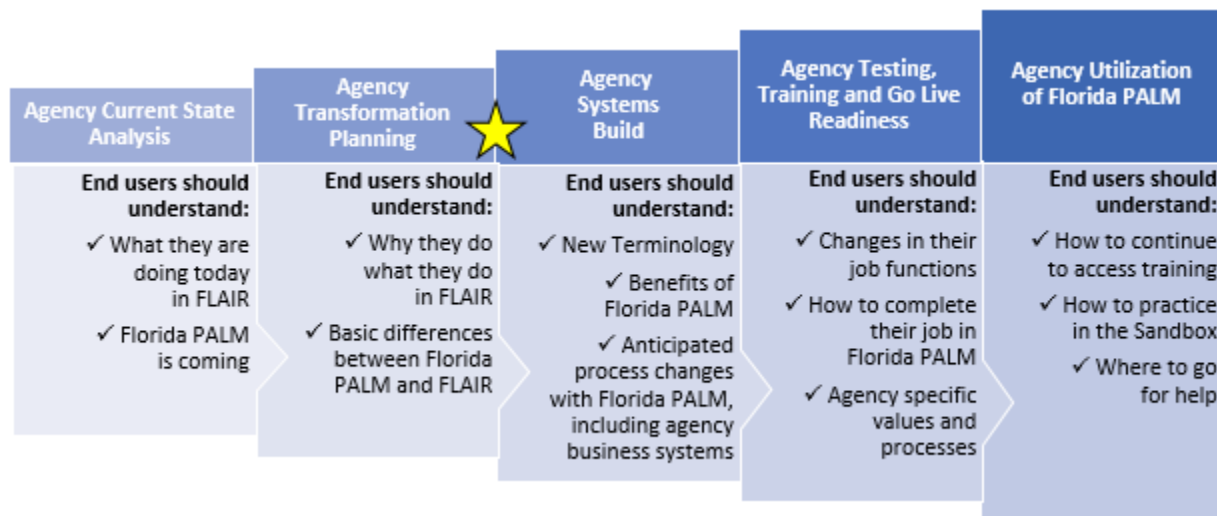


Figure 1: End User Expectations from the Implementation Timeline and Agency Activities

For this task, you are required to identify your agency’s end users that will require access to Florida PALM. This stakeholder identification began with, and builds upon, the completion of Readiness Workplan (RW) tasks 325, 328 and 503.

- *Task 325: Complete Data Security and Access Survey (Survey)* required you to collaborate with your internal FLAIR Access Custodian to identify the current, approximate number of agency users (both internal and external) and their roles when accessing FLAIR and/or an Agency Reporting Data Warehouse (if any).

- *Task 328: Document Current Agency Business Processes* required you to inventory and document all current agency accounting and payroll-related business processes, including the identification of key roles for each process.
- *Task 503: Create Workforce Readiness Plan* required you to identify your impacted workforce to better understand its current state and prepare a workforce readiness approach to assist you with “readying” your people.

This task will also require you to look beyond current FLAIR users. Agency staff who are not current FLAIR users, may be future Florida PALM users due to changes related to automated workflow within the system (increased need for processors and/or approvers), payroll process changes, agency business system retirement, etc.

## Task Elements

Use the information gathered in the Survey, your Current State Business Process Inventory and your Workforce Readiness Plan to create a comprehensive list of all end users that are expected to use Florida PALM at go-live. You should also consider Florida PALM design and changes to your internal processes and agency business systems that create the need for additional users in Florida PALM.

To help you gather information, a new sheet, *Implementation End Users*, has been created in your agency’s Florida PALM Workbook in Smartsheet. In the Implementation End Users sheet, you will include the following items for each end user that will need access to Florida PALM:

- [Business Process Grouping\(s\)](#) – Select the grouping(s) to which access is anticipated to be needed based on the end user’s job functions
- Office / Bureau / Section – Insert the title of the area within your agency that this position exists (ex., Office of Finance & Accounting/Disbursements/Travel)
- Position # – Insert the position number of this position to account for both vacancies and turnover between now and go live
- Position Title – Insert the corresponding title of this position
- First and Last Name – Insert the first and last name of the individual who currently holds this position; if the position is currently vacant, leave blank
- Email – Insert the email address of the individual who currently holds this position; if the position is currently vacant, leave blank
- Headquarters / Primary Office Location / City – Insert the primary office location for this position
- Other Information (Optional) – Insert any additional information regarding this position that you feel may be helpful to your agency or the Project

## How will agencies use this information?

This list will inform agencies about the magnitude of the change management efforts needed to ready their people for Florida PALM. Being in Smartsheet, agencies will be able to update their lists of future end users whenever needed, including removing and adding end users when turnover occurs. Agencies will also be required to update this list during each workforce readiness plan update task. Maintaining an accurate list will support the completion of future tasks that are dependent to this list including:

- Survey future end users (RW Tasks 524 and 595)
- Plan for UAT and Training (RW Tasks 536 and 568)
- Update Workforce Readiness Plan (RW Tasks 535, 585 and 608)
- Complete Change Analysis (RW Task 560)
- Assign End User Roles (RW Task 573 and 630)

## What will the Florida PALM Team do with this information?

The successful transition to Florida PALM relies heavily on accurate and timely information about the individuals who will be using the system within your agency. Florida PALM will use this information to understand the magnitude of planned end users.

The Project team will be looking for the following items to confirm task completion:

1. List of all end users
2. All required columns within the sheet are filled out with the requested information for each end user

## Task Instructions

Create and maintain a list of future Florida PALM end users in the new Implementation End Users worksheet, located within your agency's Florida PALM Workbook in Smartsheet.

Business Process Grouping(s)	Office/Bureau/Section	Position #	Position Title	First Name	Last Name	Email	Headquarters / Primary Office Location / City	Other Information (Optional)
Account Management & Financial Repo. - Accounts Receivable	Finance and Accounting	12001234	Accountant I	John	Smith	John.Smith@agency.gov	Tallahassee	

Figure 2: Implementation End Users Sheet

### Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts

Instructions
1) Collaborate with your Change Champion Network and FLAIR Access Control Custodian to complete the Implementation End User Sheet.
2) 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 (RC).
3) Complete task by March 1, 2024.
4) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
5) If you have questions regarding this task, review the recorded Tuesday Task Talk, or contact your RC.

### Supporting Materials & Resources:

- [Implementation Timeline and Agency Activities](#)
- [Business Process Grouping Descriptions](#)