# Task Instructions

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**Task ID**: *528*
**Task Name**: *Update Agency Business System Documentation for Segment III*
**Task Start Date**: *April 15, 2024*
**Task Due Date**: *July 12, 2024*

**Task ID**: *530*
**Task Name**: *Update Florida PALM Interface Inventory for Segment III*
**Task Start Date**: *April 15, 2024*
**Task Checkpoint**: *June 1, 2024*
**Task Due Date**: *July 12, 2024*

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*This document combined the task instructions for the above two tasks related to Segment III since the effort to select Florida PALM interfaces (Task 530) must be complete in order to accurately update agency business system documentation (Task 528). These tasks for subsequent Segments will be released similarly. An overview and guidance for completing both tasks is listed below.*

## Task Descriptions

Task 528 – Review Segment III resources; update agency business system documentation including functional requirements, technical requirements, and test cases.

Task 530 – Review Segment III resources; identify and document interface needs for Florida PALM implementation.

## Task Overview

Florida PALM is a large-scale business transformation impacting your people, processes, technology, and data. You must plan for your transformation to be successful. Once you have a plan in place, you can begin to remediate based on your plans.

Transformation planning for your agency business systems requires:

1. An understanding of the current state of your business systems and the business needs the systems support;
2. An understanding of future state, including how Florida PALM will work and the related integration options; and
3. Selecting and planning for the integration option(s) that best fit your business needs then remediating your business systems.
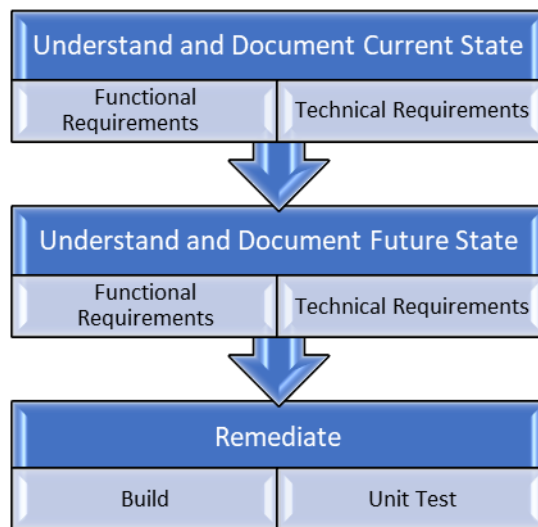


*Figure 1: Transformation Planning*

To complete these tasks, based on your understanding of the future design of Florida PALM, you will select the interfaces needed to support your business needs and update related agency business system (ABS) documentation. This is an iterative process and will be completed for each design segment.

# Task Elements

## Gain Understanding of Segment III Functionality

The following Segment III resources have been published and shared with agencies. These resources were also presented and discussed in the Segment III Design Workshops. Review the resources with your functional and technical subject matter experts (SMEs) to gain an understanding of the related functions in Florida PALM.

- Knowledge Center serves as the hub for accessing:
  - Business Process Models for Segment III
  - Related interface and report layouts found in the Interface Catalog and the Reports Catalog
- Florida PALM's website provides access to:
  - Segment III Design Workshops Presentations and Videos

## Identify How You Will Integrate with Florida PALM

Based on your business needs and the business functions impacted by Segment III designs, make decisions about how your agency will send and receive information to and from Florida PALM. When making those decisions, consider the following:



*Figure 2: Inbound and Outbound Options*

- For most processes, information can be entered into Florida PALM three different ways:
  - An inbound standard interface from an agency business system to Florida PALM; this requires the use of a standard layout.
  - A spreadsheet upload, requiring the use of a standard Excel spreadsheet template populated by a user and then uploaded as needed (by authorized roles) to Florida PALM.
  - End user manual entry.
- Information from Florida PALM can be extracted by:
  - An outbound standard interface from Florida PALM to support an agency business system.
  - End user access to reports, queries, or online inquiry in Florida PALM.
  - End user access to reports or data extracts in the Data Warehouse. Information recorded in Florida PALM will be available for self-service use in the Data Warehouse. The Data Warehouse is expected to be updated on a nightly basis.

Consider the following questions to help determine if an interface is the best option to meet your agency's business needs.

**Inbound Interfaces to Florida PALM:**
- Is an existing interface used with FLAIR today? At what interval are files provided to FLAIR?
- Is an interface and/or a spreadsheet upload template available for the business process?
- Does your agency have a business system that generates transactions that need to be loaded to Florida PALM for continued processing?
- What is the volume of transactions that need to be loaded from the business system to Florida PALM? If a low volume of transactions is managed:
  - Is the use of a Spreadsheet Upload a suitable option?
  - Is the use of end user manual entry a suitable option?
- What is the frequency that transactions need to be loaded from the business system to Florida PALM? If transactions need to be loaded infrequently:
  - Is the use of a Spreadsheet Upload a suitable option?
  - Is the use of end user manual entry a suitable option?

**Outbound Interfaces to Agency Business Systems:**
- Is an outbound interface needed?
  - Does your agency business system need transaction updates to support agency processes?
  - Does your agency business system need other (non-transaction) information to support agency processes, such as Chart of Accounts or supplier information?
- Is an extract from the Data Warehouse a suitable option for meeting information needs?
  - Does your agency need targeted information to support an agency business system's need?
  - Does your agency need information to meet ad-hoc or on-demand information needs?
- Does your agency receive an existing interface from FLAIR today? Or is the file from the FLAIR Information Warehouse?

## Task 530: Update Florida PALM Interface Inventory
**Review and Update Agency Business System Planned Integration**
Through the completion of Readiness Workplan (RW) Task 326, you provided an initial determination of which agency business systems will require remediation and indicated the Planned Integration. Review your agency business system integration plans documented in the *Current State Business Systems* inventory and make updates, if needed, to the Planned Integration status.

*NOTE: If you are building a new or replacement agency business system that will require an interface with Florida PALM, that system must be ready to participate in Connectivity Testing in September 2024 and Technical Interface Testing in January 2025. The system should also be added as a new agency business system in the Current-State Business Systems inventory and identified using the added drop-down value of "Build New System" (Figure 3) in the System Readiness Activity column. You should use the comments field to provide information about the current build status of the new agency business system.*
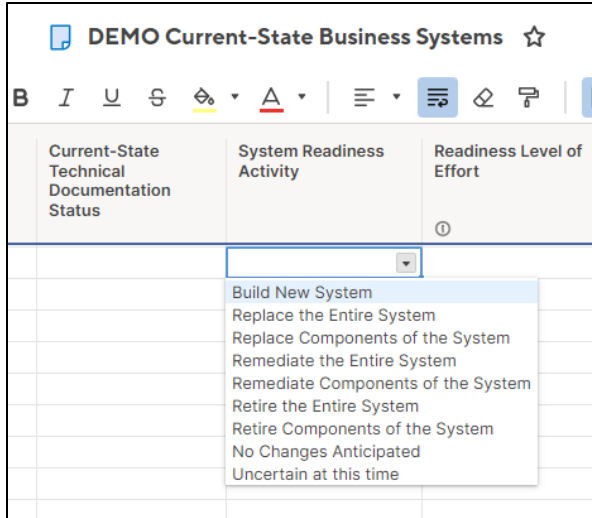
*Figure 3: <Agency Acronym> Current-State Business Systems inventory in Smartsheet*

**Select Interfaces**

The *Implementation Interfaces & Documentation* worksheet contains a pre-populated list of Business System Names and related information pulled from your *Current-State Business Systems* inventory; only those agency business systems where the System Readiness Activity value selected is "Replace Components of the System", "Remediate the Entire System", or "Remediate Components of the System".

This sheet also contains the multi-select drop down column titled Florida PALM Interface Selection(s) that includes standard interfaces released for Segments I, II, and now III. Use this drop down to make updates to your interface selections for each business system, including any selections made for the prior Segment.
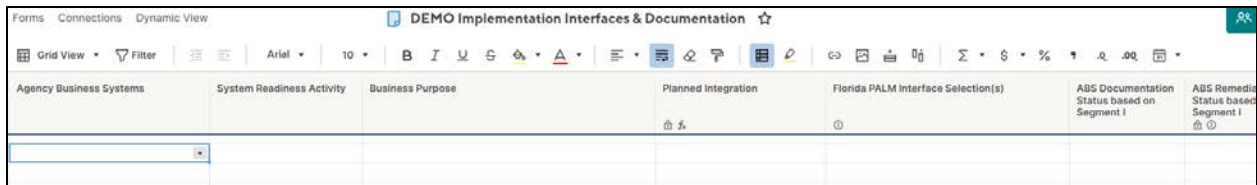


*Figure 4: <Agency Acronym> Implementation Interfaces & Documentation inventory in Smartsheet*

If the Planned Integration value selected for an agency business system is not set to "Interfaced / Direct Connection Using Standard Interface", then the Florida PALM Interface Selection(s) cell for that system will be greyed out through conditional formatting. If you selected that in error, you may change your selection in the *Current-State Business Systems Inventory* and the value will be changed the next day in the *Implementation Interfaces & Documentation* worksheet.

If you make a change to the name or qualifying criteria of an agency business system in your *Current-State Business Systems Inventory*, the business system name listed in your Implementation Interfaces & Documentation inventory will turn red. This indicates that an error has occurred, and action must be taken to replace or remove the business system name by selecting the correct value in the drop-down list.

*Task Checkpoint (June 1) - The Project's Technical Readiness team will review agency selections in the worksheet and will discuss those selections in your agency's June touchpoints.*

*This checkpoint will allow the Project and agencies to confirm progress in selecting the appropriate interface(s) for the impacted system(s).*

## Task 528: Update Agency Business System Documentation

As you are reviewing Segment III designs and making interface selections, you must update any related agency business system documentation to reflect the change needed to prepare for the new integration to Florida PALM. As you are making plans for all business systems impacted by Segment III designs (all tiers), you may also need to update information documented in your *Current-State Agency Business Systems Inventory*, such as the Readiness Level of Effort or Planned Integration columns.

The updates to your previously completed current-state documentation should include functional and technical specification requirement changes needed to integrate with Florida PALM. The Agency Business System Documentation Template (initially provided in RW Task 326) is a good resource to review to determine the nature of the critical elements of business system specification changes.

When reviewing and updating your documentation, consider the following questions:

- What does the agency business system do (functional process) and how might it have to change to meet Florida PALM requirements?
- How does the Florida PALM workflow process change agency business processes and how does it affect related agency business systems?
- What interface connections will be needed between Florida PALM and agency business systems (Reference your agency reply to RW Task 518)?
- Are there any user interface design changes needed for agency business systems?
- Does the Florida PALM report offerings or Data Warehouse availability change agency reporting needs (Reference your agency reply to RW Task 327)? What report design changes are needed for Florida PALM integration?
- Are there any middle tier or backend application programming design changes needed?
- What agency business system configuration changes are needed?
- Are there any database design changes needed?
- What unit test plans (for testing all design changes) are needed before testing begins?

Based on your review and evaluation of Project-provided Segment III design resources, you will determine if there are impacts to any of your agency business systems and whether there are no updates needed or updates needed to your agency business system documentation. The existing ABS Documentation Status based on Segment III column, within your agency specific *Implementation Interfaces & Documentation* worksheet, has now been unlocked. As you complete your evaluation and documentation is being updated, use this column to provide the appropriate documentation status from the following options:

- Not Started
- Evaluation In Progress
- Evaluation Complete
- Documentation Update Not Needed
- Documentation Update Not Started
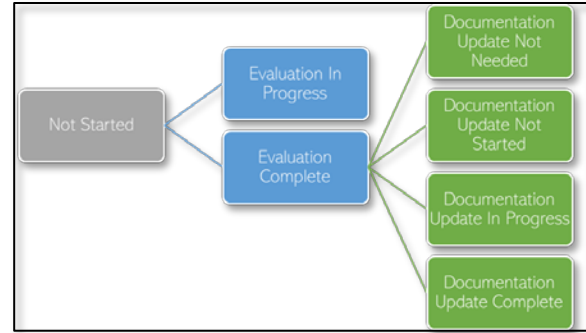- Documentation Update In Progress
- Documentation Update Complete



*Figure 5: ABS Status*

While not requested as part of this Task, you should be prepared to show updated agency business system documentation with the Project as part of readiness touchpoints or through other requests, as needed.

*NOTE: Following your agency's previous completion of RW Task 516, all agency business systems listed in your agency specific Implementation Interfaces & Documentation worksheet should have a status of "Documentation Update Not Needed" or "Documentation Update Complete" in the ABS Documentation Status based on Segment II column. For all agencies who reported meeting this required task completion criteria, that column has now been locked. If your agency did not meet the required completion criteria, the column will remain unlocked and available for continued update, and the completion status on your Task Tracker will remain incomplete.*



*Figure 6: <Agency> Implementation Interfaces & Documentation worksheet in Smartsheet*

## How will agencies use this information?

Identifying future interface needs and documenting needed agency business system changes will help your agency to:

- Better understand scope, level of effort, and resource needs for agency business system transformation
- Refine your timeline and plan for remediation
- Support resource requests (e.g., legislative budget requests)

## How will Florida PALM use this information?

The Florida PALM Project team will use your interface selections to plan for future interface testing. By providing your updated agency business system documentation, the Project team will gain insights into your agency's unique planning and level of remediation efforts, as well as identify trends across agencies. Collectively the readiness tasks provide the Project team insights that allow us to better assist each agency.

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

| Task Completion Rubric | |
|---|---|
| **Task 530** | **Task 528** |
| For each Agency Business System with known interface needs (Segment III), the Florida PALM Interface Selection(s) column should have one or more selected interfaces | For each Agency Business System, the ABS Documentation Status based on Segment III column must have a status of one of the following: <br> • Documentation Update Not Needed <br> • Documentation Update Complete |
| Task tracker has been marked as 100% complete | Task tracker has been marked as 100% complete |

# Task Instructions

Collaborate with your Change Champion Network and functional and technical SMEs to identify interfaces to support your business needs and update the related agency business system documentation. Update the existing *Current-State Business Systems* worksheet in Smartsheet, as needed. Finally, update the *Implementation Interfaces & Documentation* worksheet in Smartsheet to include:

- Interfaces needed per agency business system based on the Segment III impact to the agency business system, if any; and
- Progress of agency business system documentation updates based on Segment III impact.

***Smartsheet Navigation:***

- Current-State Business Systems is located in:
  *Florida PALM Workbook for (Agency) > Inventories > Business System Inventory*
- Implementation Interfaces & Documentation is located in:
  *Florida PALM Workbook for (Agency) > Inventories > Interface 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.

| Summary of Task Completion Steps |
|---|
| 1) *Collaborate with your CCN and functional and technical SMEs to understand the designs for Segment III and integration needs to support your agency business functions.* |
| 2) *Complete **initial** Segment III Florida PALM Interface selections in the Implementation Interfaces & Documentation worksheet in Smartsheet by **June 1, 2024**.* |
| 3) *Be prepared to discuss interface selections with the Project team in June. Agencies may choose to make changes to interface selections after discussions with the Project team.* |
| 4) *Update Agency Business System documentation to reflect integration changes.* |
| 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.* |

| **Summary of Task Completion Steps** |
| --- |
| *6)* *Finalize interface selections and updates to agency business system documentation by **July 12, 2024**.* |
| *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 Talk, listen to available Task recordings, or contact your Readiness Coordinator.* |

## Supporting Materials and Resources:

- RW Task 326 - Update Current-State Agency Business System Inventory and Documentation Materials
- Knowledge Center
- Segment III Design Workshop (Business process flows, recordings, presentations)
- Interface Catalog and the Reports Catalog