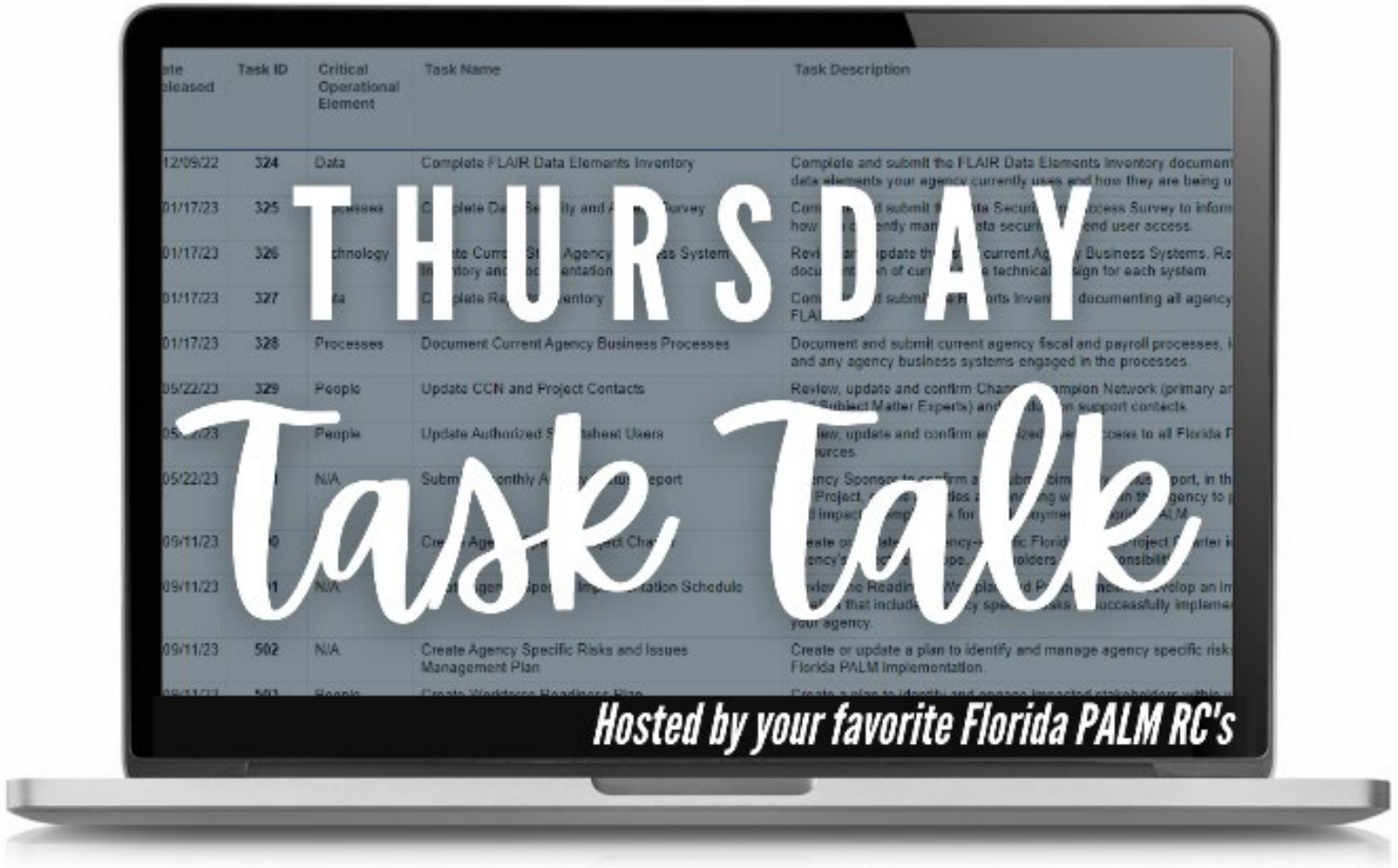
Florida PALM

Planning, Accounting, and Ledger Management



JULY 10, 2025

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Agenda

- UAT Prerequisites
- Task Spotlight:
  - 574 Addendum – Prepare Documentation for User Acceptance Testing
- Role Mapping Update
- Reminders

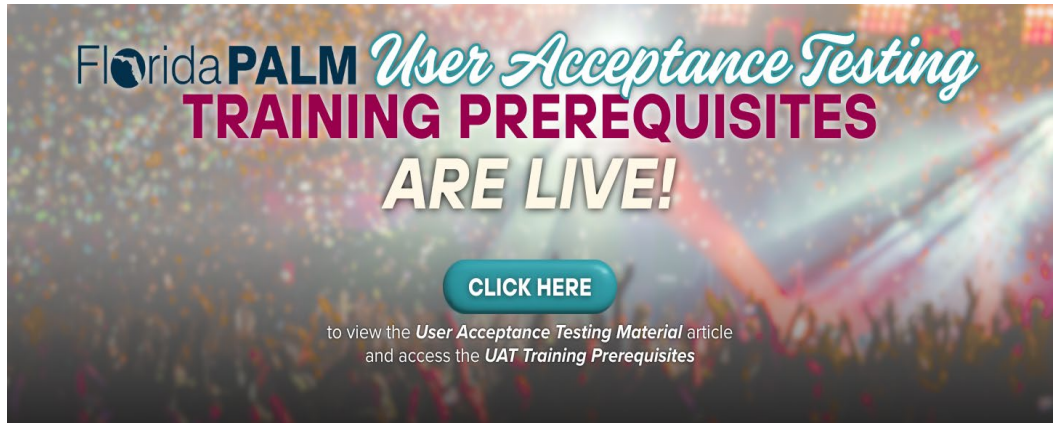
User Acceptance Testing – Testing Prerequisites

User Acceptance Testing Materials

- UAT Prerequisites
- Process Steps (coming soon)

UAT Prerequisites

- Training Liaison Role in Completion of UAT Prerequisites
  - Ensuring Users Know Their Required Trainings
  - Guide and Support Users to access People First LMS
  - Monitor and Report Training Progress & Completion
  - Ensure Timely Completion
  - Verify all Items are Completed by End Users for Required Programs
- Required Learning for UAT Online (SME)
- UAT Online (SME) Learning Paths



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574 Addendum - Prepare Documentation for UAT

Due 8/8/2025

Project Recommended Standard Activities

- Updated Florida PALM Topics & Activities List
- At least one User Story created for all activities in this list applicable to your agency
- Record User Story status and number in new Smartsheet: *<Agency> Project Recommended Standard Activities*

Forms Connections Dynamic View — DEMO Project Recommended Standard Activities

Grid Filter Arial 10

Percentage of User Stories Created	Business Process Grouping (BPG)	Process Module	Topic Name	Activity Name	User Story Creation Status	Number of User Stories Created	Comments
0.00%	AAM	AM	Acquire and Set Up Assets	Importing Assets			
	AAM	AM	Acquire and Set Up Assets	Manually Creating and Updating Asset Records			
	AAM	AM	Acquire and Set Up Assets	Manually Creating and Updating Asset Records with Cost Information Only			
	AAM	AM	Acquire and Set Up Assets	Running the Transaction Loader Process			
	AAM	AM	Executing Disposal	Initiating a Disposal Request			
	AAM	AM	Executing Disposal	Reviewing and Approving Asset Disposal Requests			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Executing Transfer of Assets – Inter/IntraUnit			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Initiating Transfer Request - Inter/IntraUnit			
	AAM	AM	Initiating, Approving, and Executing Asset Transfer Requests	Reviewing and Approving Asset Transfer Requests - Inter/IntraUnit			
	AAM	AM	Reviewing, Updating and Approving Information in the Staging Table	Reviewing and Updating Asset Information			
	AAM	AM	Updating with the Results of the Physical Inventory	Extracting List of Assets to be included in Physical Inventory			
	AAM	AM	Updating with the Results of the Physical Inventory	Reconciling and Creating Asset Records			

Role Mapping Update

- RW Task 573-B releases next week
- Role Mapping and Implementation End User Worksheets will be merged into one sheet moving forward
- UAT SME Role Mapping submitted for 573-A and the Implementation End User Worksheets will be locked/archived today in preparation for Role Mapping to reopen next week

Reminders: Upcoming Task Due Dates

July 10

- ✓ 611 – Submit Bimonthly Agency Readiness Status Report

July 11

- ✓ 591 - Confirm IdP Configuration for Florida PALM
- ✓ 610 - Update Authorized Smartsheet Users

July 18

- ✓ 593 - Update Agency Readiness Certification #1

July 25

- ✓ 576 - Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing

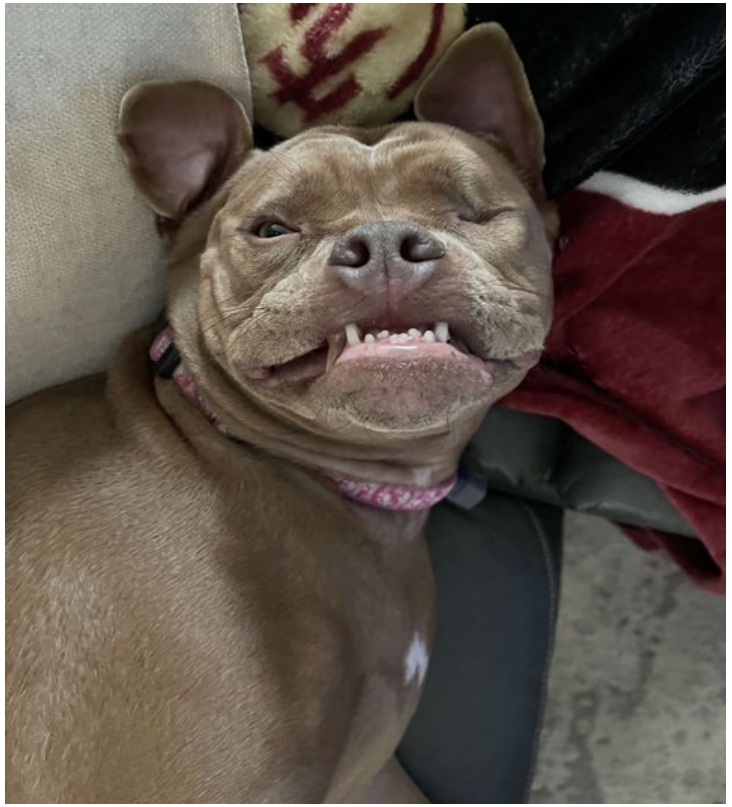
August 8

- ✓ 574 - Prepare Documentation for User Acceptance Testing

MAZIKEEN
"MAZE" COLE

ATHENA
"BIG BOOTY"
COLE

Questions?



Contact us

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Project Website

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