Role Assignment Approach

Overview

Florida PALM is a role-based system. End users are granted access to complete functions in Florida PALM based on their role assignment(s). Roles are a component of access controls for sensitive or protected data. Role assignments for agency end users will be confirmed through agency User Acceptance Testing (UAT), and role-based capabilities will be the basis for training activities for end users.

Agencies assign roles to end users to complete functions specific to their job duties and responsibilities. Florida PALM roles may include responsibilities and abilities which are similar to or very different from how end users perform their duties in the legacy system. ***Agencies are responsible for understanding how working in Florida PALM will be different from FLAIR for their end users.*** Agencies will evaluate the duties and capabilities of each Florida PALM role, consider the current skill sets and responsibilities of the users and those needed for the roles, and make assignments to agency end users based on agency business processes and objectives.

Currently, roles are active and available in Florida PALM for Cash Management functionality, as identified in the Agency Role Mapping Handbook. Agency Security Access Managers (SAMs) maintain role assignments for current Florida PALM end users.

Florida PALM end user roles needed for Financials, Payroll, and Data Warehouse implementation (January 2026) are or will be:
- defined by the Project during functional design;
- shared with agencies through design workshops and the Knowledge Center;
- assigned by agencies to end users through Role Mapping tasks;
- tested and validated by end users during UAT; and
- used to identify and assign end user learning paths.

Agencies will complete their role assignment in four main steps, as shown in Figure 1.

Figure 1: Role Assignment Steps

Table 1 provides an overview of the specific Readiness Workplan (RW) tasks that have and will support agency role assignment activities.

Table 1: RW Tasks Supporting Role Assignment

Task ID	Task Name	How the Task Supports Role Assignment	Task Dates
512	Identify Future Florida PALM End Users	Initial identification of Florida PALM end users, including classification of business process grouping.	Jan – Mar. 2024

Task ID	Task Name	How the Task Supports Role Assignment	Task Dates
515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	Iterative change impact activity for each design segment to understand changes, including changes to people and processes.	Jan. – Apr. 2024
527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	Iterative change impact activity for each design segment to understand changes, including changes to people and processes.	Apr. – July 2024
543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	Iterative change impact activity for each design segment to understand changes, including changes to people and processes.	Jul. – Oct. 2024
560	Submit Change Analysis Tool	Consolidation of all change impacts into a change analysis tool, to include people changes, that will inform role mapping.	Oct. – Dec. 2024
564	Update Future Florida PALM Users	Update to end user list that will be used for first role mapping task.	Nov. – Dec. 2024
573	Complete and Submit End User Role Mapping Worksheet	Using the Role Mapping Worksheet, all end users will be mapped to role assignments for User Acceptance Testing.	Jan. – Feb. 2025
596	Participate in User Acceptance Testing	All end users will test and validate role assignments during UAT.	Apr. – Nov. 2025
630	Update and Submit End User Role Mapping Worksheet	Final submission of end user role assignments to be uploaded into Florida PALM just before go-live.	Nov. – Dec. 2025

Understanding End User Roles

Through functional design, the Project has finalized the business process models for implementation, which include all end user roles required to complete each business process. The Project will further define and explain end user roles by providing information in the Knowledge Center. The Knowledge Center will include all available roles, as well as:

- their descriptions;
- associated business processes;
- responsibilities;
- relationship to other roles; and
- any identified separation of duties (e.g., SOD conflicts).

The Project will also share information about security levels for each role. Currently in Florida PALM, end user roles are configured at the Business Unit level, meaning that agency end users only have access to the data for their agency. In the next major implementation, some roles will offer the ability for agencies to further restrict access to data to certain Organization ChartField values within the agency.

Agencies should begin with an understanding of their current state processes. Agencies can then build an understanding of each Florida PALM business process and their associated end user roles through

the iterative design segment activities, including reviewing information in the Knowledge Center, attending design segment workshops, and completing tasks to identify change impacts to their people, processes, technology, and data for each design segment. Identification and documentation of all change impacts will be consolidated in a change analysis tool that agencies will use to inform role assignments for their end users.

Assigning End User Roles

Agencies will use their understanding of Florida PALM end user roles, their users, and their completed change analysis to establish role assignments for all end users. Prior to UAT, an End User Role Mapping Worksheet that includes all roles will be provided for each agency to complete end user role assignments.

Agencies will be required to submit their Role Mapping Worksheet at two different times, once before UAT (RW Task 573) and again before go-live (RW Task 630). The submitted End User Role Mapping Worksheet will be used to support the establishment of end users and assign roles in Florida PALM for UAT and go-live.

Testing End User Role Assignments

All agencies and all agency end users are expected to participate in UAT before go-live. During UAT, end users will test and validate role assignments to ensure they have the appropriate roles and can complete their daily functions. SAMs will also participate in UAT by making role assignments or role assignments updates, if needed. After UAT, agencies will provide a final Role Mapping Worksheet to be uploaded into Florida PALM for go-live.

End User Training

Project-developed training will identify the target audience for each training topic based on end user role. Therefore, agencies will use end user role assignments to identify and assign the appropriate learning path for each end user.

Post Implementation

After Financials and Payroll Waves go live, agency SAMs will be responsible for maintaining role assignments within Florida PALM, just as they do currently for CMS functionality. The Florida PALM Security Access Manager User Manual provides guidance on performing this role in Florida PALM. The Division of Accounting and Auditing (A&A), through issuance of CFO Memo No. 28 released in July 2024, establishes the expectations and responsibilities for SAMs, which includes maintaining internal controls based on position descriptions, separation of duties, and user rights to access specific functions in Florida PALM.