

Task Instructions

Task ID: 325

Wave: *Financials and Payroll Waves*

Task Name: *Complete Data Security and Access Survey*

Task Type: *Configuration, Security*

Task Due Date: *February 3, 2023*

Task Overview

In December, the Project team completed meetings with every agency, during the Personalized Agency Working Sessions, to understand agency unique business processes and their potential impact on system requirements. During the sessions, some agencies shared the importance of securing and limiting access to some of their data sets within their agency. The Project is now gathering additional feedback specific to how agencies are managing data security and end user access for Departmental, Central, PYRL, RDS/NASSAM, IW/MRE/WebFocus, and agency reporting data warehouses (e.g., FLAIR@, FIS). The information will be used to confirm requirements and inform design options for Florida PALM. A Data Security and Access Survey has been developed to gather your feedback.

Data Security and Access Survey

Complete the Data Security and Access Survey sheet that has been added to your Inventory Workbook in Smartsheet. The staff you previously designated as users of your Inventory Workbook will have access to the new sheet. The Smartsheet should be updated with your agency's information by the task due date. Smartsheet resources are linked below under Supporting Materials & Resources, which can provide a refresher for how to access and use the tool.

It is anticipated that this will require multiple resources within your agency to complete. Here are some options available to assist with internal agency collaboration and completion of the survey.

- Use the provided Data Security and Access Survey Supplemental Document to collect information. Your designated Smartsheet users would then copy and paste that information into the Data Security and Access Survey sheet in Smartsheet to complete the survey.
- Your designated Smartsheet users may download the Data Security and Access Survey sheet to Excel to collect information. Your designated Smartsheet users would then copy and paste that information into the Data Security and Access Survey sheet in Smartsheet and complete the survey.
- A new Smartsheet feature has been enabled to allow your designated Smartsheet users to share this sheet with others within your agency, granting both view and/or edit access to the sheet. This allows you to manage access at the agency level, distributing the input or compilation of the responses to multiple agency resources.

Please note: Smartsheet does not maintain a version history. It is recommended to closely maintain and limit user access to only those that need to make updates to the sheet.

How can agencies use this Data Security and Access Survey?

You will use the information captured in your Data Security and Access Survey during future analysis of your agency's change management activities and tasks. This survey will also assist you with a later task to document your business processes.

What will Florida PALM Team do with this information?

The Florida PALM team will review the survey results and confirm requirements for future system functionality. As part of future design discussions, the information will help identify options for data security and access functionality in Florida PALM.

Task Instructions

Please collaborate with your Change Champion Network and team familiar with current data security and access processes and methods to collect their feedback in order to complete the survey.

Instructions
<p>1) Review your agency’s current data security and end user access processes for Departmental, Central, PYRL and reporting systems to include RDS/NASSAM, IW/MRE/WebFocus and any agency reporting data warehouses (e.g., FLAIR@, FIS)</p>
<p>2) Document findings in the Data Security and Access Survey in Smartsheet by February 03, 2023.</p> <ul style="list-style-type: none"> • Complete the questions for each of the systems listed. • Include N/A in cells where applicable. • If there are multiple agency reporting data warehouses, specify the system name within the response cell. • Use the response cell for question 8 (for each applicable system) to provide any additional information you feel is pertinent for how your agency provides or manages its data security functions.
<p>3) Send an email to FloridaPALM@myfloridacfo.com by February 03, 2023, notifying the Project that your agency has completed the task.</p>
<p>4) If you have questions regarding the Data Security and Access Survey, participate in or review the Tuesday Task Talk on Tuesday, January 24, 2023, or contact your Readiness Coordinator.</p>

Supporting Materials & Resources:

- [Data Security and Access Questions](#) – Supplemental Document
- [Tuesday Task Talk](#) - 01/24/2023
- Smartsheet Resources – Documentation provided by the Florida PALM Project to support agency use of the Smartsheet tool
 - [Smartsheet User Guide](#)
 - [Smartsheet Access Request](#)
 - [Smartsheet Job Aid](#)