

## Task Instructions

**Task ID:** 330

**Task Name:** *Update Authorized Smartsheet Users*

**Task Start Date:** *June 12, 2023*

**Task Due Date:** *June 23, 2023*

### Task Description

Review, update and confirm authorized users' access to all Florida PALM Smartsheet resources.

### Task Overview

Your agency recently completed a confirmation of your Change Champion Network assignments using the expectations set forth by the [CCN Roles and Responsibilities](#) document. As stated in that document, primary and backup Agency Liaisons and Project Management Liaisons are expected to "Manage agency user access to agency and Project information in Smartsheet."

To meet these expectations, Agency Liaisons and Project Management Liaisons must:

- Manage access to all resources within your agency-specific Florida PALM Workbook in Smartsheet. To do so, the Project team granted Agency Liaisons and Project Management Liaisons access to the 'Editor – Can Share' role in your agency-specific Florida PALM Workbook.
- Manage agency team requests for access or removal of access to restricted Florida PALM resources, such as the Catalog of Interface Offerings and the Catalog of Conversion Offerings. To do so, Agency Liaisons and Project Management Liaisons are authorized to complete the [Florida PALM Smartsheet Access Request Form](#) to request access be granted or removed.

This task requires Agency Liaisons and Project Management Liaisons to complete the initial review and update of authorized agency Smartsheet users, which they will continue to manage throughout the duration of the Project.

#### *How can agencies use this information?*

Agencies will use this information for readiness task completion efforts to ensure the correct individuals have the necessary access to the available Smartsheet resources. Agency Liaisons and Project Management Liaisons can make any necessary Smartsheet access updates at any time.

#### *How can Florida PALM use this information?*

The Florida PALM team will continue to allow the Agency Liaisons and Project Management Liaisons to manage Smartsheet user access for agency users.

### Task Instructions

This task requires multiple steps for completion. Agency Liaisons and Project Management Liaisons should:

1. Review the two newly created reports (shown below in Figure 1) within your agency-specific Florida PALM Workbook in Smartsheet.

- a. The <Agency Acronym> Access to Florida PALM Catalogs Report shows who within your agency has been granted access to the Florida PALM Catalog of Interface Offerings and Catalog of Conversion Offerings. Both catalogs are protected and access must be granted to view.
- b. The <Agency Acronym> Access to Florida PALM Workbook Report shows who has access to each individual worksheet within your agency-specific Florida PALM Workbook, as well as what level of access they currently have (Viewer or Editor – Cannot share).

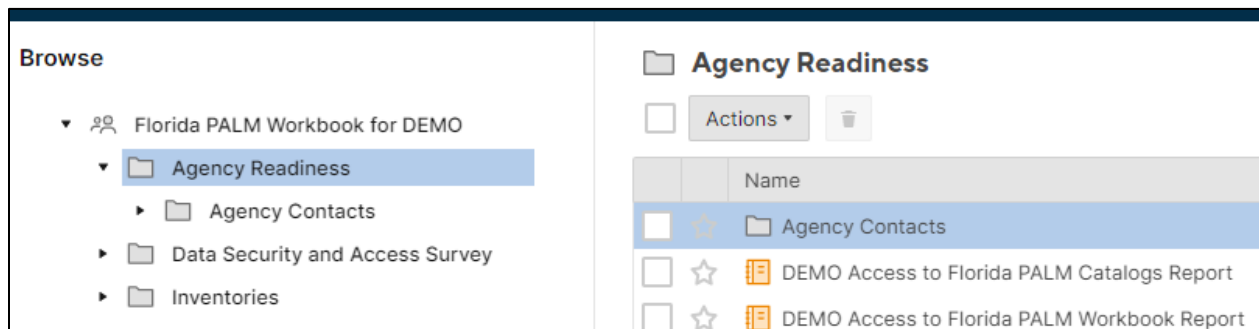


Figure 1: Report Location in Smartsheet

2. Confirm current agency staff’s access to the Florida PALM Catalog of Interface Offerings and Catalog of Conversion Offerings in the <Agency Acronym> Access to Florida PALM Catalogs Report
  - a. If updates are needed, complete the Florida PALM Smartsheet Access Request Form to either grant or remove access to agency staff. The Project will receive the change request and make the necessary changes.
3. Confirm current agency staff’s access to all needed worksheets within your agency’s Florida PALM Workbook are correct in the <Agency Acronym> Access to Florida PALM Workbook Report.
  - a. If updates are needed, you may do the following:
    - i. grant ‘Editor – Cannot Share’ access
    - ii. grant ‘Viewer’ access
    - iii. or remove access completely for agency staff.

As a reminder, your Smartsheet Workbook is a protected series of worksheets and can only be accessed by staff you have designated. Users with editing access to your agency-specific worksheets should be controlled and limited to maintain data integrity. Smartsheet does not offer version history or the ability to revert back to a previous version after a worksheet has been changed and saved.

Smartsheet resources are linked below, which can provide a refresher for how to access and use the tool. You may export your access reports to Excel to support your review and update of team assignments. Update and confirm your agency user Smartsheet access by the requested due date.

**Instructions**

- 1) Agency Liaisons and Project Management Liaisons review and validate the current access levels of agency staff to Florida PALM Smartsheet resources.

**Instructions**

- 2) *If access updates are needed, either update agency staff access to the resources in your agency-specific Florida PALM Workbook or complete and submit the Florida PALM Smartsheet Access Request Form for the protected Catalog resources.*
- 3) *Send an email confirming completion of your Update to Authorized Smartsheet Users to your agency's Readiness Coordinator (RC), Back-up RC, and the Florida PALM inbox: [FloridaPALM@myfloridacfo.com](mailto:FloridaPALM@myfloridacfo.com) by **June 23, 2023**.*
- 4) *If you have questions regarding this task, listen to the Tuesday Task Talk on Tuesday, June 13, 2023, or contact your RC.*
- 5) *Prepare to discuss your agency's progress on this task during monthly touchpoint meetings with your RC.*

**Supporting Materials & Resources:**

[Smartsheet User Materials](#): *Access Link, Agency Access Form, Job Aid and User Guide*