

## Organization Security Rule Configuration

This workbook contains a single worksheet that represents a core configuration in Florida PALM. Column/field definitions and instructions are provided below. This configuration workbook contains the following all module configuration to which agencies will provide the values that will be setup in Florida PALM:

- Org Security Rule

### **Smartsheet Navigation:**

*Florida PALM Workbook for (Agency) > Inventories > Configuration Workbook Inventory > Org Security Rule*

## Organization Security Rule

Agencywide	Security Rule	Description	Long Description	Sequence Number	Field Criteria	Select Value	To Value	Comments

Figure 1: Org Security Rule Worksheet in Smartsheet

## Configuration Value Definition

Organization (Org) Security in Florida PALM is a control mechanism used to restrict or grant user access to specific transactional data based on Organization ChartField values. It allows agencies to define who can view, modify, or report on specific transactional data within the system by applying security rules aligned with organizational structures.

## Configuration Value Purpose and Use

Within the Accounts Payable (AP), Purchasing (PO), and Asset Management (AM) modules only, Org Security is a feature that helps to ensure users can only access the financial information related to their defined values, preventing unauthorized access to data. Using Org Security, agencies can minimize errors or data misuse by allowing only authorized personnel to make changes or review certain records. Finally, better data management can be obtained across multiple divisions, bureaus, or sections by segmenting access based on predefined rules.

## Configuration Design Details

The following design considerations are applied when defining an Org Security Rule in Florida PALM:

- **The Security Rule must begin with the first 2 digits of your agency BU**, with the exception of the following agencies required to use additional digits from their BU as listed below.
  - FGCC must use 415
  - FSDB must use 489
  - DOAH must use 7297

- Org values can be used in multiple Org Security Rules (wildcard %, range, or specific). Ensure all Org values that will be used in AM, AP, and PO transactions are included in at least one rule.
- Do not include duplicate Org values within the same rule.
- Whenever possible, use broad ranges or wildcards for Org Security Rules to simplify assigning Org Security Rules to system users. Avoid creating rules with specific Org values, where possible, to reduce maintenance when Org value changes occur.
- Consider whether Org Security Rules should vary by role (e.g., processor, approver and reporter). Ensure that roles with broader or narrower access needs are reflected in the security rules.
- For users needing access to all Org values, designate them as “Agencywide”. Users with this designation bypass the requirement to create and assign Org Security rules to the user which simplifies the process.
- Florida PALM user roles define pages a user can access and what the user can do, while Org Security further restricts Org values users can transact with, approve, or view online and in reports.
- Ensure that all rules are future-proof, allowing for potential additions of Org values to your Org structure without having to update numerous Org Security Rules.

### Configuration Field Details

Agencies must provide the following Org Security Rule related configuration values as listed in the <Agency> Org Security Rule worksheet in Smartsheet.

Table 2: Organization Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
<b>Agencywide</b>	Drop-down column: "Yes - Configuration Not Needed", or "No - Configuration Needed". This field allows agencies to select whether they are 'Agencywide' and do not use Org Security (Yes), or if they do use Org Security (No).	Required	Character	N/A	Agency Indicated
<b>Security Rule</b>	This field specifies the name of the ChartField Security Rule.	Required	Character	10	Agency Provided
<b>Description</b>	This field provides a brief description of the Security Rule.	Required	Character	30	Agency Provided
<b>Long Description</b>	This field allows for a more detailed explanation of the Security Rule.	Required	Character	254	Agency Provided

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
<b>Sequence Number</b>	This field uniquely identifies each line in the Security Rule.	Required	Number	5	Agency Provided
<b>Field Criteria</b>	Drop-down used to define how the valid Org values are selected for the Security Rule: Detail Value, Range, or Wild Card.	Required	Character	12	Agency Provided
<b>Select Value</b>	This field defines the specific ChartField values used to configure the Security Rule.	Required	Character	10	Agency Provided
<b>To Value</b>	This field is used when a 'Range' of values is defined / selected in the Field Criteria.	Required <i>(Prior column dependency)</i>	Character	10	Agency Provided
<b>Comments</b>	Agency comments.	Optional for Smartsheet	Character	254	Agency Provided

Configuration Page(s)

**Security Rules**

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**Add a New Value** 🔍 Find an Existing Value

\*Security Rule

\*Field Name  🔍

Figure 2: Org Security Rule Configuration Page 1

**ChartField Security Rules**

**Rule Definition**    Users

Security Rule: ADMINVCSA Display Options

Description:

Long Description:

Field Name: Organization

**Field Criteria**

1 of 1 | View All

*Field Criteria	SetID	Select Value		
Detail Value	<input type="text"/>	<input type="text"/>	+	-

Save    Notify Add    Update/Display

Figure 3: Org Security Rule Configuration Page 2

**Assign Security Rule to User ID**

**Assign Rules**    Exceptions    Security Values

User ID: YOGESH.DESHMUKH    Deshmukh, Yogesh    Message Log    Build

Effective Date: 07/01/2024    Status: Active    Super User:

**Rule Assignments**

\*Field Name: Organization

**Security Rules for User**

*Security Rule	All Products	Select Products		
<input type="text"/>	<input checked="" type="checkbox"/>	Select Products	+	-

Save    Return to Search    Notify Add    Update/Display    Include History    Correct History

Figure 4: Org Security Rule Configuration Page 3

Figure 5: Org Security Rule Configuration Page 4

### Worksheet Instructions

The below information provides detailed column instructions on how to complete the <Agency> Organization worksheet in Smartsheet.

**Task Completion Requirement:** For this task (RW Task 567-I) to be considered complete, it is necessary that you follow all steps listed below to ensure you have filled in or selected the appropriate values.

1. Agencywide
  - a. If your agency does not use Org Security, select “Yes - Configuration Not Needed” from the Agencywide column drop-down to indicate that you are agencywide. The remaining columns will turn grey, indicating that no further action is needed.
  - b. If your agency does intend to use Org Security, select “No - Configuration Needed” from the Agencywide column drop-down to indicate that your agency does intend to configure Org Security Rule.
2. Security Rule
  - a. Enter a unique name for the Security Rule (up to 10 characters). This field allows blanks, spaces, and special characters; however, we recommend avoiding blanks or spaces. If special characters are necessary, we suggest using an underscore (“\_”) only.
  - b. **The Security Rule must begin with the first 2 digits of your agency BU**, with the exception of the following agencies required to use additional digits from their BU as listed below.
    - i. FGCC must use 415
    - ii. FSDB must use 489
    - iii. DOAH must use 7297
  - c. Example using DFS: 43ASSIST
  - d. Example using DOAH: 7297ADMINS
  - e. If you exceed the 10-character maximum field limit or do not use the specified required digits from your agency BU, the cell will turn red and remain red until corrected.
3. Description
  - a. Enter a description up to 30 characters to give insight into the Security Rule's purpose. If you exceed the 30-character maximum field limit, the cell will turn red and remain red until fixed.

- b. Example: Consumer Assistance Bureau Org
  4. Long Description
    - a. Enter a detailed description up to 254 characters, explaining the Security Rule's usage or scope. If you exceed the 254-character maximum field limit, the cell will turn red and remain red until fixed.
    - b. Example: This rule grants access to all Org values within the Bureau of Consumer Assistance.
  5. Sequence Number
    - a. Set this value to 1 when configuring a single Field Criteria. If an agency chooses to define multiple Field Criteria within the same rule, copy the Security Rule, Description, and Long Description to the next row and increment this value by 1, repeating these steps for each additional criteria. If you exceed the 5-character maximum field limit, the cell will turn red and remain red until fixed.
    - b. Example: 1
  6. Field Criteria
    - a. Choose one of the following options:
      - i. Detail Value: Use this for specific Org values.
      - ii. Range: Use this to define a range of Org values.
      - iii. Wild Card: Use this to define values based on partial Org values with wildcards.
    - b. A Security Rule can have more than one type of Field Criteria (i.e., a different Field Criteria for each different Sequence Number).
    - c. Example: Range
  7. Select Value
    - a. Provide the appropriate value based on the selected Field Criteria:
      - i. Detail Value: Enter the specific Org value.
      - ii. Range: Enter the starting Org value in this field, and the ending Org value in the To Value field.
      - iii. Wild Card: Enter a partial Org value with a wildcard (e.g., 12%).
    - b. Example: 1200000000
    - c. If you exceed the 10-character maximum field limit, the cell will turn red and remain red until fixed.
  8. To Value
    - a. Enter the ending Org value if you selected Range in the Field Criteria.
    - b. Example: 1299999999
    - c. If you exceed the 10-character maximum field limit, the cell will turn red and remain red until fixed.
  9. Comments
    - a. Add agency comments optionally for your internal purposes, as needed.