Task Instructions

Task ID: 573-A
Task Name: *Complete and Submit End User Role Mapping Worksheet for UAT*
Task Start Date: *May 19, 2025*
Task Due Date: *June 20, 2025*
Project Impact: **Direct**

Task Description

Complete and submit the End User Role Mapping Worksheet to assign Florida PALM end user roles to SMEs for UAT.

Task Overview

Florida PALM is a role-based system. Agencies must assign roles to end users to complete functions specific to their job duties and responsibilities, as described in the Role Assignment article in the Knowledge Center. An End User Role Mapping Worksheet will be used by your agency to identify the Florida PALM End User roles your Subject Matter Experts (SMEs) will need to be assigned in preparation for User Acceptance Testing (UAT). Agencies will also provide information regarding an end user's transactional data access needs based on organizational security and Data Warehouse/Business Intelligence (DW/BI) access needs.

When assigning end user roles, consider the actions your SMEs perform today, and the actions they will perform within Florida PALM after go-live. Your agency's Change Analysis Tool (RW Task 560) should be used as a resource to understand the activities your agency will complete in Florida PALM and the related change impacts to your people, processes, technology and data at implementation. Use the Change Analysis Tool as a resource to build understanding of the end user roles your SMEs will need based on the activities they perform.

End User Role articles have been published to the Knowledge Center to help build understanding of the Florida PALM agency end user roles. Each article includes the role's description and responsibilities, functions (i.e., applicable Topics and Activities from the Florida PALM Topics and Activities list), relationships to other roles, and any role conflicts. The Role Assignment article describes the importance of roles and assigning the correct roles in Florida PALM. Included on the Role Assignment article is the Role Conflict Matrix, which provides a listing of all agency role conflicts, including Separation of Duties (SODs) and system enforced controls along with the conflict reasoning. Agencies should use these resources to support end user role assignments.

The Project will use role assignment information provided by agencies in this task to load the UAT SMEs with their Financials and Payroll end user roles into the UAT environment prior to the start of UAT Online. DW/BI access needs, indicated by agencies as part of role assignment, will be reviewed and assessed by the Project after submission of the task. Based on the review, additional information may be required prior to the Project granting access.

This task (RW Task 573) has been separated into two manageable subtasks as described below in Table 1.

Table 1: RW Subtasks

Subtask	Subtask Planning Objectives	Planned Dates
573-A	Agencies will be required to complete and submit the End User Role Mapping Worksheet to assign Florida PALM end user roles to SMEs for UAT.	May 19, 2025 – June 20, 2025
573-B	Agencies will be required to complete and submit the End User Role Mapping Worksheet to assign remaining end users to Florida PALM end user roles.	July 14, 2025 – Oct. 3, 2025

Task Elements

This task contains two parts:

1. Confirm your UAT SMEs and update if needed
2. Complete end user role assignment for UAT SMEs

Confirm UAT SMEs

You recently updated your future Florida PALM End Users (RW Task 564), ensuring that you have documented all planned end users for go-live, including identification of each end users' related business process grouping(s) based on their job functions. You then identified the end users that you expect to participate in the first phase of User Acceptance Testing (UAT Online) as a SME (RW Task 579).

Review your identified UAT SMEs in your *<Agency> Implementation End Users* worksheet in Smartsheet to ensure that all UAT SMEs have been identified and the information provided for each UAT SME is accurate. Complete updates needed. Your identified UAT SMEs and some of their related information will be auto-populated in the *<Agency> Role Mapping* worksheet to support your efforts in assigning each SME's the needed end user role(s).

NOTE: *Your <Agency> Implementation End Users has been moved to the new Agency Role Mapping folder located in your Agency Readiness Folder in Smartsheet.*

Smartsheet Navigation:
> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Role Mapping > (Agency) Implementation End Users worksheet*

Complete End User Role Assignments

This task requires you to role map your UAT SMEs to their needed agency Financials and Payroll roles. You will also provide information regarding DW/BI access needs for each UAT SME. You should build upon your understanding of the end user roles your UAT SMEs need by reviewing your agency's Change Analysis Tool and the information provided in the Knowledge Center including the Topics and Activities list, End User Role Articles, the Role Assignment Article and the Role Conflict Matrix.

To assign roles to your SMEs, a new worksheet *<Agency> Role Mapping* has been added your agency workspace in Smartsheet.

Smartsheet Navigation:
> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Role Mapping > (Agency) Role Mapping worksheet*

End Users Requiring Role Assignment

All UAT SMEs should be assigned the end user role(s) they are expected to have after go-live. In UAT, your SMEs will:

- validate their role assignments;
- test to ensure they can perform the functions required for their job duties in Florida PALM; and
- build understanding of how Florida PALM works to support the understanding of other end users within your agency.

NOTE: *There is no "Super User Role" in UAT that gives an agency end user access to perform the functions of multiple end user roles.*

A list of your current (as of 5/14/2025) Florida PALM production end users for CMS Wave and their current role assignments has been provided as an attachment to your *<Agency> Role Mapping* worksheet. Review this report to determine if any of your UAT SMEs is also a current Florida PALM User. If yes, you must then determine if the end user's current Florida PALM roles assigned in production will continue to be needed for the Financials and Payroll Implementation, and therefore are also needed in UAT. If yes, you must include the role assignment on the *<Agency> Role Mapping* worksheet for that current end user/UAT SME.

NOTE: *Current end user role assignments in the Production environment will not be automatically applied to the UAT environment. Only the end user role assignments included in the <Agency> Role Mapping worksheet will be loaded into the UAT environment. Your Security Access Manager can provide an updated CMS Wave/Production End User Report during the duration of this task, if needed.*

Role Mapping Worksheet Instructions

The information below describes the columns in the *<Agency> Role Mapping* worksheet and provides instructions on how to complete it.

- **Error Messages** (Locked from editing)
  - o Review the Error Messages provided. This column will auto populate with relevant error messages as you complete your workbook. Once the error gets corrected, the Error Message will disappear.
  - o This column includes a message for checks related to the following:
    - ▪ any errors related to your agency's Organization Security Rules found in the *<Agency> Org Security Rule* configuration worksheet.

The following columns are populated directly from your *<Agency> Implementation End Users* worksheet for all end users identified as a UAT SME. These columns are provided for informational purposes to support and inform your role mapping efforts. The columns are locked from editing in this sheet.

NOTE: *If you need to add additional UAT SMEs or update information related to identified SMEs, you must make those updates in the <Agency> Implementation End User worksheet. Any updates made will be available in your <Agency> Role Mapping worksheet the next day via nightly processing throughout the duration of this task.*

- **Business Process Grouping(s)** (Locked from editing)
- **Topic** (Locked from editing)
- **Office/Bureau/Section** (Locked from editing)
- **Position Title** (Locked from editing)
- **First Name** (Locked from editing)
- **Last Name** (Locked from editing)
- **Email** (Locked from editing)

Provide information in the following columns to complete each end user's role assignment for Financials and Payroll end user roles.

- **<BPG> End User Role(s)** (At least one column is required to be completed for each user)
  - There are 13 <BPG> End User Role(s) columns, one for each Business Process Grouping for Florida PALM.
  - These columns contain a multi-select drop-down of all Financials and Payroll agency end user roles available based on the business process grouping.
  - Select all agency end user roles needed for each UAT SME.
  - Conditional Formatting Rules:
    - If the <BPG> End User Role(s) column is greyed out, this business process grouping is not selected for this end user, and no further action is required.
      - If you need to update the business process grouping applicable for the end user, you must make the update in the *<Agency> Implementation End User* worksheet.
    - If the <BPG> End User Role(s) column is shaded yellow, this business process grouping is applicable for the end user, therefore you must select at least one role from the drop-down, but you may select as many as applicable.
      - If you need to update the business process grouping applicable for the end user, you must make the update in the *<Agency> Implementation End User* worksheet
    - If the <BPG> End User Role(s) column is shaded red, you have selected two or more roles with a SOD Conflict for an end user. You must either update your role selections for that end user to remove the SOD Conflict or provide compensating controls in the SOD Justification column.
- **SOD Conflict Justification** (Required if an end user has been assigned roles in conflict, as indicated by red highlighting in any of the <BPG> End User Role(s) columns)
  - You must provide a description of the compensating controls in place for this SOD conflict.
  - SOD Conflicts and agency provided justifications will be provided to Department of Financial Services, Division of Accounting and Auditing (DFS A&A) for review and approval at the conclusion of this task.
  - Conditional Formatting Rules:
    - The cell will turn yellow if an end user has a SOD conflict in any of the <BPG> End User Role(s) columns. The cell will remain yellow if the cell is empty.

NOTE: Review the Role Conflict Matrix in the Role Assignment article for a list of all SOD conflicts and the reasoning for the conflict. Although agency Security Access Manager (SAM) roles are not included in this role mapping activity, a SAM should not be assigned any AM, AP, or PO processor or maintainer roles, as this creates a SOD conflict. Review your current

SAMs listed in your <Agency> Security Access Managers worksheet in Smartsheet for a list of your current agency SAMs.

- **Org Security Rule** (Required for all end users assigned with an AM, AP, and/or PO role, if your agency has configured Org Security Rules)
  - o This column contains a drop-down list of all Org Security Rules provided in your *<Agency> Org Security Rule* configuration worksheet during RW Task 567-I.
    - ▪ Updated values provided as part of current configuration task (RW Task 657) will be available through nightly processing throughout the duration of this task.
  - o If your agency has not configured any Org Security Rules and has opted to be "Agencywide", your column will be locked from editing.
    - ▪ If you choose to no longer be "Agencywide" and configure Org Security Rules, you must add Org Security Rules in your *<Agency> Org Security Rule* configuration worksheet as part of RW Task 657. Updated values provided as part of current configuration task (RW Task 657) will be available through nightly processing throughout the duration of this task.
      - • ***You must also notify your Readiness Coordinator*** to have your Org Security Rule column in this worksheet unlocked so you can complete role assignment.
  - o Conditional Formatting Rules:
    - ▪ The cells in this column will be grey and locked from editing if your Org Security Rule is "Agencywide".
    - ▪ The cells in this column will be grey if the end user is not assigned any AM, AP, or PO end user roles, indicating no action is required.
    - ▪ The cell will turn yellow if your agency has Org Security Rules configured and the end user has been assigned AM, AP, or PO roles. The cell will remain yellow until an Org Security Rule is selected from the drop down.

Provide information in the following columns to indicate each end user's access needs for DW/BI.

- **Is DW/BI access needed?** (Required for all UAT SMEs)
  - o Select the appropriate option from the drop-down.
    - ▪ Yes – This end user needs access to DW/BI.
    - ▪ No – This end user does ***not*** need access to DW/BI.
  - o Conditional Formatting Rules:
    - ▪ This cell will remain yellow until a selection is made.
- **DW/BI Access Needs** (Required if 'Yes' is selected in the *"Is DW/BI access needed?"* column)
  - o Choose the appropriate option(s) from the multi-select drop-down, select all that apply.
    - ▪ DW/BI Financials Data
    - ▪ DW/BI Payroll Data
    - ▪ DW/BI Information Warehouse Data
  - o Conditional Formatting Rules:
    - ▪ If "Yes" is selected in the *Is DW/BI access needed?"* column, the cell will turn yellow and remain yellow until a selection is made.
- **DW/BI Role Type** (Required if 'Yes' is selected in the *"Is DW/BI access needed?"* column)
  - o Select the DW/BI role option needed for the end user
    - ▪ Consumer

- Author
  - o Conditional Formatting Rules:
    - If "Yes" is selected in the *"Is DW/BI access needed?"* column, the cell will turn yellow and remain yellow until a selection is made.

NOTE: The DW/BI Author role should only be assigned to end users who are skilled in query writing. These users are typically your super users or problem solvers. The users in the Florida PALM Maintainer or Reconciler roles are the most likely end user candidates for the DW/BI roles. These users report across modules, business processes and fiscal years. They report on programs, projects, grant or contracts, and are often responsible for distributing reports to others within the agency.

NOTE: The Author role will be able to perform Consumer role functions, so you do not need to select both.

- **DW/BI Author Justification** (Required if 'Author' is selected in the *"DW/BI Role Type"* column)
  - o Provide information about the end user's current responsibilities and skill set that qualifies the end user to have the ability to create, modify, and share DW/BI queries.
- **Comments** (Optional for agency use)

How will agencies use this information?

Use your *<Agency> Role* Mapping worksheet to continue preparations for UAT. You will need to prepare your SMEs for UAT by ensuring they understand the responsibilities and functions of the assigned end user roles they will be testing and validating during UAT. Make updates to your UAT Plan and your Change Analysis Tool, as needed.

You will also use the information in this task to complete the following Readiness Workplan Tasks:

- 573-B – Complete and Submit End User Role Mapping Worksheet for Remaining End Users

What will the Florida PALM Team do with this information?

This task has a direct impact on Florida PALM as the Project team will use this information to create end user profiles and assign end user roles in Florida PALM, which your SMEs will validate during UAT. The loading of roles in preparation for UAT begins soon after the close of this task, therefore, it is critical that your agency complete this task thoroughly and on time in order to be ready for the start of UAT Online in August.

The Project team will review the requested DW/BI access needs and determine if additional information is required before providing DW/BI access. If required, additional DW/BI access information will be collected from agencies in a future request. The Project team will also share any agency identified SOD conflicts and provided compensating controls with DFS A&A for review and approval.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 2: Task Completion Rubric

Task Completion Rubric
All UAT SMEs have been role mapped and all required information has been provided. (No cells are yellow, and no error messages are populated in the *<Agency> Role Mapping* worksheet, indicating all required fields contain values.)
The Task Tracker has been marked as 100% submitted for this task.

Task Instructions

Review and complete your *<Agency> Role Mapping* worksheet, located within your agency's Florida PALM Workbook in Smartsheet, to assign end user roles and an organization security rule, if applicable, and indicate DW/BI access needs for SMEs participating in UAT Online.

Work with your agency's Business Liaison and Florida PALM SAMs to coordinate completion of this task.

Smartsheet Navigation:
> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Role Mapping > (Agency) Role Mapping Worksheet*

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 2 above.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Review and confirm your list of UAT SMEs and their information is accurate in the <Agency> Implementation End User worksheet. Update, if necessary.*
2) *Review the End User Role information provided in the Knowledge Center and determine the roles and data access needs for each UAT SME.*
3) *Work with each impacted division/office to review and complete the <Agency> Role Mapping Worksheet in Smartsheet.*
4) *Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.*
5) *Complete task by **June 20, 2025**.*
6) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
7) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- Role Assignment Overview
- End User Roles
- Reporting Solution
- Organization Security
- RW Task 657 - ORG Security Rule supplemental
- Previous RW Task 579 - Confirm UAT SMEs