

## Task Instructions

Task ID: 591

Task Name: *Confirm IdP Configuration for Florida PALM*

Task Start Date: June 23, 2025

Task Due Date: July 11, 2025

Project Impact: Direct

## Task Description

Agency IdP SMEs confirm IdP configuration for Florida PALM and add SMEs to agency Active Directory for User Acceptance Testing.

## Task Overview

As described in the [Identity Access Management \(IAM\) article](#), agencies are responsible for identity management and authentication controls (e.g., password policies) for their Florida PALM end users, as well as for configuring and maintaining their agency's Identity Provider (IdP) connection with the Florida PALM IAM tool. Agencies use their IdP as an Agency User Directory or Active Directory that contains user credentials. The configuration of the agency IdP with the Florida PALM IAM tool allows end users to single sign-on to Florida PALM.

In previous RW Task 578, agencies reviewed their current IdP configuration with Florida PALM and analyzed future end users to determine if new IdP configurations would be required for User Acceptance Testing (UAT). Agencies that identified new IdP configurations to be established will now complete the IdP configuration in this task (RW Task 591). Additionally, all agencies will be required to ensure that their UAT SMEs are added to or exist in the agency's Active Directory and are assigned to the appropriate Security Group in order to access the UAT environment. Finally, at least one SAM from each agency must test and confirm access to the Florida PALM Access Management tool for UAT.

## Task Elements

This task contains three parts:

1. IdP SMEs add UAT SMEs to the Agency Active Directory Florida PALM Security Group
2. SAMs confirm access to the Florida PALM UAT Access Management tool
3. Establish new IdP configuration (select agencies)

## IdP SMEs add UAT SMEs to the Agency Active Directory Florida PALM Security Group

Your IdP SMEs are the primary contacts that manage the Active Directory at your agency. Your agency's IdP or Active Directory is the tool that allows for single sign-on to Florida PALM. This task requires IdP SMEs to add your UAT SMEs to the appropriate Active Directory Security Group so that those specified end users can access the UAT environment.

IdP SMEs should use your list of identified UAT SMEs that are being role mapped (RW Task 573-A) and ensure those UAT SMEs are in your agency's Active Directory and have been added to the Florida PALM Security Group for UAT, which will begin in August 2025.

**NOTE:** *Agency UAT SMEs will have the opportunity to test access to the UAT environment in early August, prior to the start of UAT.*

Once your IdP SME confirms that all agency UAT SMEs have been added to the Florida PALM Security Group for UAT within your agency’s Active Directory, you must indicate completion in your <Agency> UAT IdP worksheet in Smartsheet. This worksheet has been updated to include new columns for this task, as shown below in Figure 1. Use the *UAT SMEs Added to Active Directory* column to confirm this first element of this task has been completed.

UAT SMEs Added to Active Directory	Name of SAM Performing Test	SAM Access Testing	SAM Access Testing Issue
<input type="button" value="v"/> Not Started In Progress Complete			

Figure 1: New columns added to <Agency> UAT IdP worksheet

### SAMs Confirm Access to Florida PALM UAT Access Management Tool

Agency SAMs must test access to the Florida PALM Access Management tool that will be used for UAT. This tool for UAT mirrors the Access Management tool your SAM is currently using to support end user access to the Florida PALM production environment. Therefore, your SAMs should be familiar with the look and feel of the tool. The [Florida PALM SAM User Manual](#) includes instruction on accessing and using the tool.

To complete this test, a confidential document, *SAM Testing*, has been added to a new folder titled *SAM Resources* in your agency’s Florida PALM Secure File Share portal.

**NOTE:** *Your SAMs are likely not approved to access your Florida PALM Secure File Share portal. It is recommended that an approved Secure File Share user accesses the SAM Testing document and shares with your agency SAM(s) confidentially, per your agency confidential data protocols.*

The *SAM Testing* document provides the detailed steps and the information required to perform this test. The basic steps include:

- Logging into the Florida PALM UAT Access Management tool;
- Confirming access by capturing a screenshot of the landing page; and
- Confirming access to the UAT SAM Reporting Dashboard.

Each SAM that performs the test must complete the following to record progress, report issues (if any) and confirm completion in the <Agency> UAT IdP worksheet in Smartsheet:

- Name of SAM Performing Test Column – Use this column to provide the name of the SAM completing the test.
  - The tester must be an approved SAM for your agency. You may refer to the [Security Access Managers \(SAM\)](#) listing published to the End User Support page of the website to verify your current SAMs.
  - You must have at least one SAM confirm completion of this test.

- If you choose to have more than one SAM complete the test, each SAM name may be added on separate rows.
- **SAM Access Testing Status Column** – Use this column to provide the status of the test. Drop down options include:
  - Not Started
  - Testing Successful – Screenshot Attached
    - Attach your screenshot to the row using the paperclip icon.
  - Testing Unsuccessful – Assistance Needed
    - If this option is selected, you must provide a description of this issue in the next column.
    - The Project team will be alerted if this option is selected. The Project Team will review the information you provide regarding the issue and will contact you to provide technical support.
    - Upon resolution of the issue and a successful test, you should update the status to “Testing Successful – Screenshot Attached” and attach a screenshot confirming success.
- **SAM Access Testing Issue** – Use this column to describe any testing issues that require assistance from the Project Team. This column has a drop-down option but also allows for a free-text entry. In your own words, describe the issue or error you have encountered, if any.
  - This column is required only if “Testing Unsuccessful – Assistance Needed” is selected in the previous column.
  - It is highly recommended that you also attach a screenshot showing the issue you are encountering to the row using the paperclip icon.
  - The Project Team will review the information you provide regarding the issue and will contact you to provide technical support.
  - Upon resolution of the issue, select “Issue Resolved” from the drop down.

UAT SMEs Added to Active Directory	Name of SAM Performing Test	SAM Access Testing Status	SAM Access Testing Issue
	SAM Tester	<div style="border: 1px solid #ccc; padding: 2px;">                     Not Started                      Testing Successful - Screenshot Attached                      Testing Unsuccessful - Assistance Needed                 </div>	

Figure 2: SAM Testing Columns in <Agency> UAT IdP worksheet

## Establish New IdP Configuration (Select Agencies - DFS, EOG, FCOR, FDOT, SCS)

Agencies that identified the need for additional IdP configurations to be established prior to UAT in the previous RW Task 578 are required to work with the Florida PALM Technical team to establish and test the new configurations. These agencies include DFS, EOG, FCOR, FDOT, and SCS. All meetings will be virtual using Microsoft Teams and will require the use of screen share by the agency.

At least one person representing each of the following roles at your agency must participate in the technical IdP Configuration meeting:

- Agency IdP SME
- Agency SAM
- Agency Test End User(s) – The agency test end user must have an email address that matches the email domain being configured for the IdP connection.
  - The agency test end user may also be the agency SAM if the email domain is the same.
  - The agency test end user is not required to be a current Florida PALM end user or a future Florida PALM end user.

***Register and Participate in Technical Meeting to Complete IdP Configuration***

Review the meeting times below in Table 1 and register for the time that your agency-required participants are available. Click the URL for your selected meeting time and complete the meeting request. If that meeting time has already been reserved, you will receive a notification that the registration is no longer available, and you will be required to select a different meeting time / link from the below list. Your meeting time will be confirmed by the Florida PALM team, at which time your participants will receive the Teams link and general guidance including the steps to establish a new IdP configuration.

*Table 1: Meeting Times and Registration*

Meeting Date	Meeting Start Time	Meeting Registration Link
06/25/25	10:00 a.m.	<a href="https://signupforms.com/registrations/42329">https://signupforms.com/registrations/42329</a>
06/25/25	3:00 p.m.	<a href="https://signupforms.com/registrations/42338">https://signupforms.com/registrations/42338</a>
06/26/25	9:00 a.m.	<a href="https://signupforms.com/registrations/42339">https://signupforms.com/registrations/42339</a>
06/26/25	3:00 p.m.	<a href="https://signupforms.com/registrations/42340">https://signupforms.com/registrations/42340</a>
06/27/25	9:00 a.m.	<a href="https://signupforms.com/registrations/42341">https://signupforms.com/registrations/42341</a>
06/27/25	12:00 p.m.	<a href="https://signupforms.com/registrations/42342">https://signupforms.com/registrations/42342</a>
06/30/25	10:00 a.m.	<a href="https://signupforms.com/registrations/42343">https://signupforms.com/registrations/42343</a>
06/30/25	12:00 p.m.	<a href="https://signupforms.com/registrations/42344">https://signupforms.com/registrations/42344</a>
07/01/25	11:00 a.m.	<a href="https://signupforms.com/registrations/42345">https://signupforms.com/registrations/42345</a>
07/01/25	2:30 p.m.	<a href="https://signupforms.com/registrations/42346">https://signupforms.com/registrations/42346</a>

Ensure all required agency participants attend the technical IdP meeting. During this meeting, the Florida PALM Technical Team will request agency information regarding the new IdP needs and provide technical support to walk the participants through the steps to establish and test the new IdP connection.

If the configuration is unsuccessful, additional technical IdP meetings may be required until successful completion. The Project’s Technical Team will track progress and confirm completion of the new IdP configuration.

**How will agencies use this information?**

Completion of this task supports your agency preparations for UAT, ensuring your SAMs and UAT SMEs will be able to access the UAT environment. This task is directly associated with the following Agency Readiness Certification 1 (RW Task 593) Criteria:

- Agency IdP has been confirmed, and configuration with the Florida PALM UAT environment is on track to be complete before the start of UAT.

- Agency SME end users have been added to the agency’s IdP for the Florida PALM UAT environment.

## What will the Florida PALM team do with this information?

The Project team will monitor progress of the testing throughout the duration of the task and provide technical support to troubleshoot any issues as needed.

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
“Complete” is selected in the <i>UAT SMEs Added to Active Directory</i> column of the <i>&lt;Agency&gt; UAT IdP worksheet</i>
At least one active SAM has been listed in the <i>Name of SAM Performing Test</i> column of the <i>&lt;Agency&gt; UAT IdP worksheet</i>
For every SAM listed in the <i>Name of SAM Performing Test</i> column, the selection of “Test Successful – Screenshot Attached” has been made in the <i>SAM Access Testing Status</i> column and a screenshot of the Florida PALM UAT Access Management landing page has been attached to the row.
For select agencies, the Florida PALM Technical Team has confirmed completion of new IdP configurations (DFS, EOG, FCOR, FDOT, SCS).
The Task Tracker has been marked as 100% complete for this Task.

## Task Instructions

Your IdP SME must update your agency Active Directory to ensure your UAT SMEs are included in the Florida PALM Security Group for UAT. Indicate completion in the *<Agency> UAT IdP worksheet*.

At least one agency SAM must complete a test to access the Florida PALM UAT Access Management tool using the information and steps provided in the confidential SAM Testing document located in your *<Agency> Secure File Share*. If any technical assistance is required from the Project team, indicate “Testing Unsuccessful – Assistance Needed” and describe the issue in your *<Agency> UAT IdP worksheet*. Upon successful completion of the test, confirm completion by providing a screenshot of the landing page and indicating successful completion in the SAM Access Testing Status column.

For DFS, EOG, FCOR, FDOT, SCS only – Select a meeting time. During the IdP Configuration meeting, work with the Florida PALM Project team to establish and test the new IdP connection(s). Participate in additional meetings to complete the IdP configuration, if needed.

### Smartsheet Navigation:

*Florida PALM Workbook for (Agency) > Agency Readiness > Testing > (Agency) UAT IdP*

### Secure File Share Navigation:

*Florida PALM Secure File Share for (Agency) > SAM Resources > SAM Testing*

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.

Table 3: Summary of Task Completion Steps

<b>Summary of Task Completion Steps</b>
<i>1) IdP SMEs add UAT SMEs to the Florida PALM Security Group for UAT within your agency Active Directory. Provide confirmation of completion in the &lt;Agency&gt; UAT IdP worksheet.</i>
<i>2) SAM(s) conduct test to access the Florida PALM UAT Access Management tool. Report any issues in the &lt;Agency&gt; UAT IdP worksheet.</i>
<i>3) SAM(s) provide a screenshot of a successful test and confirm completion in the &lt;Agency&gt; UAT IdP worksheet.</i>
<i>4) Select agencies (DFS, EOG, FCOR, FDOT, SCS only) participate in technical meeting with the Project Team to establish and test IdP configuration.</i>
<i>5) 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.</i>
<i>6) Complete task by <b>July 11, 2025</b>.</i>
<i>7) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
<i>8) If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.</i>

**Supporting Materials & Resources:**

- [Identity Access Management \(IAM\) article](#)
- [Florida PALM SAM User Manual](#)
- Current [Security Access Managers \(SAMs\)](#)