

Organization Security Rule Configuration

This workbook contains a single worksheet that represents a core configuration component in Florida PALM that crosses multiple modules. Column/field definitions and instructions are provided below. This configuration workbook contains the following module configuration to which agencies will review and update (as needed) the values that will be set up in Florida PALM:

- Org Security Rule

Smartsheet Navigation:

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

Ongoing Data Maintenance

As described in the [Readiness Workplan \(RW\)](#), agencies are asked to complete the following tasks to maintain conversion and configuration related workbooks, as they will be used to support the Project performed Dry Runs and final Cutover as shown in the [Testing Timeline](#).

- Task 697 – Maintain Configuration and Conversion Workbooks
- Task 699 – Maintain Configuration and Conversion Workbooks
- Task 701 – Submit Configuration and Conversion Workbooks
- Task 703 – Maintain Configuration and Conversion Workbooks
- Task 706 – Submit Configuration and Conversion Workbooks
- Task 709 – Submit Configuration and Conversion Workbooks

Org Security Rule

Error Messages	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.

Org Security Rule is being utilized across agency worksheets (Figure 2) to ensure the most current information is available in associated ChartField drop-down selections as you complete end user role mapping worksheet.

Failure to complete the <Agency> Organization configuration worksheet will result in Organization ChartField values being unavailable for selection by your agency if you wish to establish a Detail Value in the <Agency> Org Security Rule worksheet.

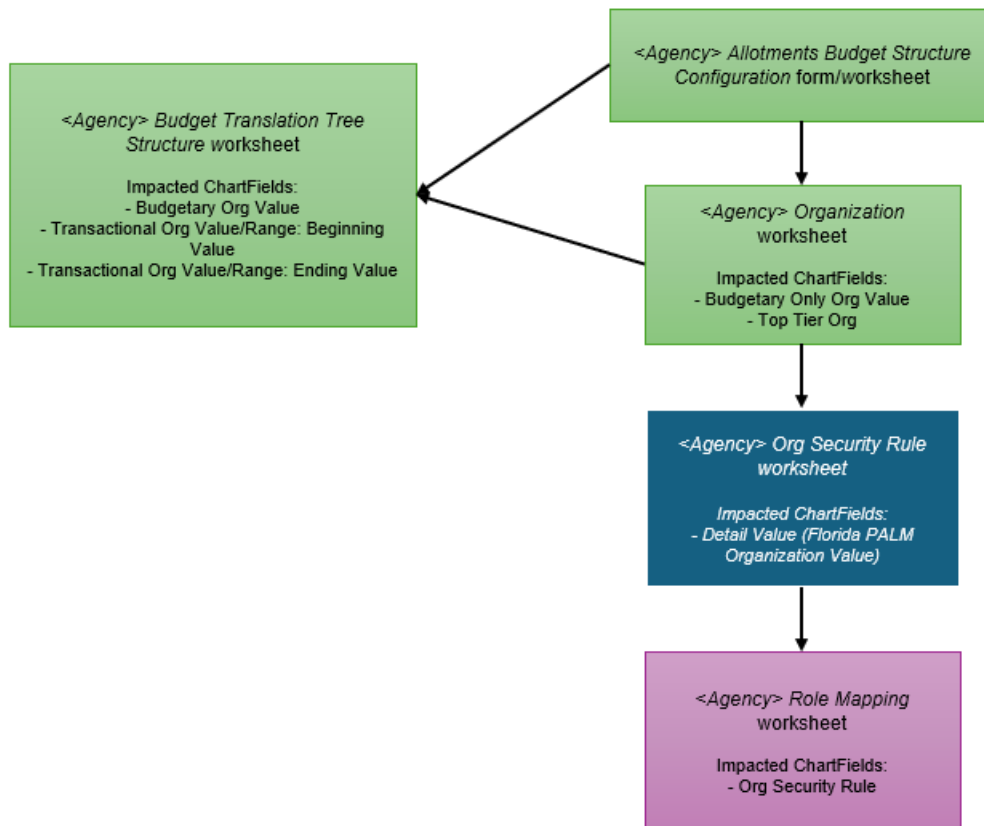


Figure 2: Cross-worksheet Connections for Org Security Rule

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
- All Org Security Rules must start at sequence number one (1), and additional rows within the same rule must be in sequential order (Example: 2, 3, 4). Sequence numbers cannot be skipped and must be in sequential order when belonging to the same rule.
- 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 1: Org Security Rule Field Details

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
Error Messages	<i>Real-time “[RT]” and/or interfaced “[API]” messages, which describe all errors found in the Agency Indicated, Agency Provided, or Agency Specified fields.</i>	N/A	N/A	N/A	Project Provided
Agencywide	Drop-down column: "Yes - Configuration Not Needed", or "No - Configuration Needed". This field allows agencies	Required	Character	N/A	Agency Indicated

Field Name	Field Description	Required / Optional Field	Field Type	Field Length	Field Value Input
	to select whether they are 'Agencywide' and do not use Org Security (Yes), or if they do use Org Security (No).				
Security Rule	This field specifies the name of the ChartField Security Rule.	Required	Character	10	Agency Provided
Description	This field provides a brief description of the Security Rule.	Required	Character	30	Agency Provided
Long Description	This field allows for a more detailed explanation of the Security Rule.	Required	Character	254	Agency Provided
Sequence Number	This field uniquely identifies each line in the Security Rule.	Required	Number	5	Agency Provided
Field Criteria	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
Select Value	This field defines the specific ChartField values used to configure the Security Rule.	Required	Character	10	Agency Provided
To Value	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
Comments	Agency comments.	Optional	Character	254	Agency Provided

Configuration Page(s)

Security Rules

Add a New Value Find an Existing Value

*Security Rule

*Field Name

Figure 3: Org Security Rule Configuration Page 1

ChartField Security Rules

Rule Definition Users

Display Options

Security Rule: ADMINVCSA

Description:

Long Description:
254 characters remaining

Field Name: Organization

Field Criteria

1-1 of 1 | View All

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

Figure 4: Org Security Rule Configuration Page 2

Assign Security Rule to User ID

User ID: AADAMS Student from Campus System Message Log Build

Effective Date 1 of 1 View All

*Effective Date: 01/01/1901 *Status: Active Agency-wide

Rule Assignments 1 of 1 View All

*Field Name: Organization

Security Rules for User 1-2 of 2 View All

*Security Rule	Description	All Products	Select Products
11000_APW2	Updated	<input checked="" type="checkbox"/>	Select Products
31000_ORG3	CF Security Rule for Org	<input checked="" type="checkbox"/>	Select Products

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, Include History, Correct History

Figure 5: Org Security Rule Configuration Page 3

Request CF Security Build

Run Control ID: DSB_ORG_SEC_BUILD Report Manager Process Monitor Run

Process Request Parameters 1-1 of 1 View All

Process Type	*Request Date Option	*Security Method	Security Rule	Field Name	User ID
Build	System Date	User ID			

Buttons: Save, Notify, Add, Update/Display

Figure 6: 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. Continue to update Org security rule values for your agency as needed.

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 should remain blank, as indicated by grey conditional formatting.

- b. If your agency plans to use Org Security, select "No - Configuration Needed" from the Agencywide column drop-down to indicate that your agency intends to configure Org Security Rule.
2. Security Rule
 - a. Enter a unique name for the Security Rule (up to 10 characters), starting with your agency's BU. 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.
Example using DFS: 43ASSIST
Example using DOAH: 7297ADMINS
 - b. 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.
 - c. If your agency chooses to define multiple Field Criteria within the same rule, the Security Rule must be the same for all criteria.
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.
Example: Consumer Assistance Bureau Org
 - b. If your agency chooses to define multiple Field Criteria within the same rule, the Description must be the same for all criteria.
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.
Example: This rule grants access to all Org values within the Bureau of Consumer Assistance.
 - b. If your agency chooses to define multiple Field Criteria within the same rule, the Long Description must be the same for all criteria.
5. Sequence Number
 - a. Set this value to one (1) when configuring a single Field Criteria. If your 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 one, and repeat these steps for each additional criterion.
 - b. Sequence numbers must remain in sequential order within the worksheet and cannot skip numbers. If sequence number one (1) is removed or becomes invalid, all subsequent rows (Example: 2, 3, 4) will become invalid.
 - c. If you exceed the 5-character maximum field limit, the cell will turn red and remain red until fixed.

Agencywide	Security Rule	Description	Long Description	Sequence Number	Field Criteria	Select Value	To Value
No - Configuration Needed	12PALM	Consumer Assistance	This rule grants access to all Org values within the Bureau of Consumer Assistance.	1	Wild Card	12%	
	12PALM	Consumer Assistance	This rule grants access to all Org values within the Bureau of Consumer Assistance.	2	Detail Value	1300000000	

Figure 7: Org Security Rule Sequence Number Example

NOTE: Security Rule, Description, and Long Description must match exactly for Security Rules with multiple sequences.

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).
 Example: Range

7. Select Value

- a. Provide the appropriate value based on the selected Field Criteria:
 - i. Detail Value: Enter the specific Org value.
 1. If selecting Detail Value, specific Org values should be configured in your Agency Organization configuration workbook.
 - 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%).
 Example: 1200000000
- b. 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.
 Example: 1299999999
- b. If you exceed the 10-character maximum field limit, the cell will turn red and remain red until fixed.

9. Review and correct any errors identified in the *Error Messages* column.

10. Use the Comments field, optionally, for your internal purposes.