

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 Overview](#) article in the Knowledge Center. An End User Role Mapping Worksheet is used by your agency to identify the Florida PALM End User roles your end users need. Agencies will also provide information regarding an end user's transactional data access needs based on organizational security.

When assigning end user roles, consider the actions the end user performs 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 roles your end users will need based on the activities they perform.

[End User Role articles](#) in the Knowledge Center are a resource to 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 Overview article describes the importance of roles and assigning the correct roles in Florida PALM. Included in the article are the following resources support end user role assignments:

- [End User Role Listing](#) – a listing of all roles, indicating which roles are available for agency role mapping and have access to sensitive data.
- [End User Role Conflict Listing](#) – a listing of all agency role conflicts, including Separation of Duties (SOD) and system enforced restrictions along with the conflict reasoning.
- [Agency SOD Conflict Matrix](#) – a matrix view of agency SOD conflicts by role and module. The matrix includes only agency processor, approver, and maintainer roles and their applicable SOD conflicts. The matrix excludes agency reporter, requestor and viewer roles, which do not have related SOD conflicts, and agency-specific and enterprise roles.

UAT Refresh End User Load

The Project will take a snapshot of your <Agency> *Role Mapping* worksheet on June 26, 2026, (RW Task 702) to be used for the end user load during the UAT environment refresh. **All** agency end users should be included with the necessary role and access assignments.

SOD conflict governance will be strictly enforced by DFS A&A after the UAT Refresh, per [CFO Memo 34](#). Agencies should resolve SOD conflicts (i.e., adjust conflicting role assignments) prior to the submission of the Role Mapping Worksheet for the UAT refresh. Agencies who are unable to resolve SOD conflicts must work with A&A for guidance or receive exception status for any SOD conflicts prior to June 26, 2026. All SOD exceptions must be documented on A&A's [SOD Conflict Request form](#) and attached to the Role Mapping Worksheet.

NOTE: *Any SOD conflicts in the Role Mapping worksheet that have not been granted an exception by A&A will not be loaded for the UAT Refresh.*

Role Maintenance During UAT

It is best practice for your role mapping worksheet to accurately reflect end user role assignment in the UAT environment. As new users are added or as role changes are being made in the UAT

environment, you should ensure the necessary updates are also being maintained in your <Agency> *Role Mapping* worksheet. Your agency SAM can provide regular UAT User Access reports to support the reconciliation efforts that may be required between any role changes in the UAT environment and the role mapping worksheet.

Worksheet Instructions

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

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Role Mapping

Error Message Section

- **Error Messages** (Locked from editing)
 - Review the error messages provided. This column will auto-populate with relevant error messages as you complete your workbook via overnight processing. Once the error gets corrected, the error message will disappear via overnight processing.
 - This column includes a message for validations related to the following:
 - Any errors related to your agency's Organization Security Rules found in the <Agency> *Org Security Rule* configuration worksheet.
 - Any errors related to selected Business Process Groupings, topics from the [Topics and Activities](#) list and role selection alignment.
 - Any end users that are duplicated on the worksheet.
 - Any end user roles selected that are no longer valid, based on the [End User Role Listing](#).
 - Any end users that require access to protected data, but the "Sensitive Data Access Confirmation" column is blank.
- **DW/BI Error Messages** (Locked from editing)
 - Review the error messages provided. This column will auto-populate with relevant error messages as you complete your workbook in real time. Once the error gets corrected, the error message will disappear.
 - This column includes a message for validations if the number of end users with DW/BI roles exceeds the number of DW/BI licenses allotted for your agency.
 - Remove the appropriate number of roles to resolve the error.
 - Your agency DW/BI License Allotment is noted in the 'Tool Tip' located in the header of the following columns:
 - DW/BI Financials Data Role
 - DW/BI Payroll Data Role
 - DW/BI Projects Data Role
- **SOD Errors** (Locked from editing)
 - Review the error messages provided. This column will auto-populate with relevant error messages as you complete your workbook via overnight processing. Once the error gets corrected, the error message will disappear via overnight processing.
 - This column includes a message for validations related to any SOD conflicts based on role assignment.
 - Review the [End User Role Conflict Listing](#) or [Agency SOD Conflict Matrix](#) and update role assignment to correct the errors.

- If unable to remove the SOD conflict, you must receive an exception from A&A.
- **SAM Error Messages** (Locked from editing)
 - Review the error messages provided. This column will auto-populate with relevant error messages as you complete your workbook via overnight processing. Once the error gets corrected, the error message will disappear via overnight processing.
 - This column includes a message for validations related to SOD conflicts based on role assignment for your agency SAM(s).
 - Review the [End User Role Conflict Listing](#) or [Agency SOD Conflict Matrix](#) and update role assignment to correct the errors or work with A&A for approval of a different SAM within your agency.

End User Information Section

Review information about each of your end users and update as necessary. Add new end users, if needed. You may also delete rows for end users who are no longer required for role mapping.

- **SOD Conflict(s) Approved by A&A**
 - Use this column to track which SOD conflicts have been approved by A&A.
 - Provide a checkmark if A&A has granted an exception for a user's SOD conflict(s).
 - Attach the [SOD Conflict Request form](#) documenting A&A's granted exception to the row for that end user.
- **SAM** (Locked from editing)
 - Any end user who is also an agency SAM will be identified with a check mark.
 - Changes to an agency SAM must be approved by A&A. The Project is notified when a change is made and will make updates to the SAM column, as necessary.
 - There are many end user roles that are in conflict with the SAM role, as described in the [SAM Role Article](#), [End User Role Conflict Listing](#) and [Agency SOD Conflict Matrix](#)
 - End users who are also SAMs should only be assigned reporter or viewer roles.
 - Error messages for any SAM related SOD conflicts will be populated in the *SAM Error Messages* column.
- **Initial UAT Load** (locked from editing)
 - This column indicates end users who were loaded into the UAT environment at the start of All Agency UAT based on your previous role mapping submission (RW Task 573-B).
- **Enabled in UAT Environment** (Optional for each end user)
 - Use this column to track which end users are testing in the UAT environment based on your agency's UAT plan and tester enablement approach.
 - Provide a checkmark if the end user is currently enabled to access the UAT environment, meaning they have been added to your agency's active directory and have been assigned roles by your agency SAM.
 - Remove a checkmark if the end user was previously but now is not currently enabled to access the UAT environment.
- **Business Process Grouping(s)** (Required for each end user)
 - Select the applicable grouping(s) for that end user based on the end user's job functions and end user roles needed.
- **Topic** (Required for each end user)

- Select the applicable topic(s) for that end user based on the end user's job functions.
- **Office/Bureau/Section** (Optional for each end user)
 - Provide the title of the area within your agency that the end user's position exists (e.g., Office of Finance & Accounting/Disbursements/Travel).
- **Position #** (Optional for each end user)
 - Provide the position number of this position to account for both vacancies and turnover between now and go live.
- **Position Title** (Optional for each end user)
 - Provide the position title of this position to account for both vacancies and turnover between now and go live.
- **First Name** (Required for each end user)
 - Provide the end user's first name.
 - If the position is vacant, indicate so by adding 'Vacant' in the cell.
- **Last Name** (Required for each end user)
 - Provide the end user's last name.
 - If the position is vacant, indicate so by adding 'Vacant' in the cell.
- **Email** (Required for each end user)
 - Insert the email address of the end user, which will be used for credentialing purposes.
 - If the position is vacant, indicate so by adding 'Vacant' in the cell.
- **Headquarters/Primary Office Location/City** (Optional for each end user)
 - Provide the location within your agency that the end user's position exists.

NOTE: Vacant positions will not be loaded into Florida PALM. Those records are for agency tracking through UAT and to the final go-live role mapping submission as placeholders for future incumbent identification.

NOTE: End users' name and email address MUST be recorded in the worksheet accurately, as this information is used to create the end user ID in Florida PALM. If there are errors or typos, the end user may have difficulty logging into Florida PALM after the end user load.

Role Assignment and Access Section

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 list of all applicable Financials and Payroll agency end user roles available based on the business process grouping found in the [End User Role Listing](#) worksheet.
 - Select all end user roles needed for each end user identified.

Provide information in the following columns to indicate each end user's access needs for DW/BI. Review the [Reporting Solution](#) article in the Knowledge Center for DW/BI information. There are limited agency licenses for DW/BI Financials, Payroll and Projects data. Your agency's license allotment is noted in the 'Tool Tips' located in the header of the related DW/BI role column.

The following columns contain a single-select drop-down list of all applicable DW/BI end user roles available for your agency based on the [End User Role Listing](#) worksheet.

- **DW/BI Financials Data Role** (Required for all end users who need access to DW/BI Financials Data)
 - Select the appropriate role from the drop-down.
- **DW/BI Payroll Data Role** (Required for all end users who need access to DW/BI Payrolls Data)
 - Select the appropriate role from the drop-down.
- **DW/BI Projects Data Role** (Required for all end users who need access to DW/BI Projects Data)
 - Select the appropriate role from the drop-down.
- **DW/BI Information Warehouse Data Role** (Required for all end users who need access to DW/BI Information Warehouse Data)
 - Select the appropriate role from the drop-down.

NOTE: *The DW/BI Author role should only be assigned for 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.*

- **Org Security Rule** (Required for all end users assigned an AM, AP, and/or PO role, if your agency has configured Org Security Rules)
 - This column contains a drop-down list that includes “Agencywide”, and all Org Security Rules provided in your <Agency> *Org Security Rule* configuration worksheet.
 - 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. Updated values 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.
- **Sensitive Data Access Confirmation** (Required for all end users that have roles that grant access to sensitive data)
 - Indicate understanding that the end user will have access to sensitive data based on role assignment.
 - The [End User Role Listing](#) indicates which end user roles have access to sensitive data with a checkmark in the “Access to Sensitive Data” column.
- **SOD Conflict Justification** (Locked from editing)
 - All SOD conflicts must be resolved or granted an exception by A&A, therefore this column is no longer required and is locked from editing. Any previous information provided remains for agency reference.
- **Comments** (Optional for agency use)

- Provide any comments for agency-use only.

Supporting Materials & Resources

- [Role Assignment Overview](#)
- [End User Roles](#)
- [Reporting Solution](#)
- [Organization Security](#)
- [Org Security Rule](#)