

Task Instructions

Task ID: 573-B

Task Name: *Complete and Submit End User Role Mapping Worksheet
for Remaining End Users*

Task Start Date: July 14, 2025

Task Due Date: December 19, 2025

Project Impact: Direct

Task Description

Complete and submit the End User Role Mapping Worksheet to assign Florida PALM end user roles to remaining end users.

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 end users 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 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 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 all agency end users with their Financials and Payroll end user roles into the UAT environment during the UAT refresh, so they at the start of UAT Full in December. 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 – Dec. 19, 2025

Recent End User Role Changes

The following role changes have been made since RW Task 573-A closed in June. These changes are reflected in the Knowledge Center and in the role mapping worksheet.

- Role Names Changed
 - Agency AP Manual Payment Processor has been renamed to [Agency AP Manual Payment Voucher Processor](#)
 - Agency Contract Reporter has been renamed to [Agency Contract Viewer](#)
- Roles Removed
 - Payroll Viewer has been removed. Any previous selections in the <Agency> Role Mapping worksheet for this role have been changed to [Agency Payroll Data Viewer](#)
 - Agency GL Journal Processor has been removed. Any previous selections in the <Agency> Role Mapping worksheet for this role have been changed to [Agency GL Investment Journal Processor](#)
- Roles Added
 - [Agency GL Financial Statement Journal Processor](#)
 - [Agency GL Investment Journal Processor](#)

Task Elements

Complete End User Role Assignments

This task requires you to role map your end users to their needed agency Financials and Payroll roles. You will also provide information regarding DW/BI access needs for each end user. You should build upon your understanding of the roles your end users 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 end users, your <Agency> Role Mapping worksheet in Smartsheet has been updated to include your UAT SMEs' role assignments and all other end users that were previously listed in your <Agency> Implementation End Users worksheet.

NOTE: Your <Agency> Implementation End Users worksheet and previous Role Mapping submission for UAT SMEs (RW Task 573-A) have been added to your archived workspace in Smartsheet for reference.

Current end user role assignments in the production environment and previously submitted UAT SME role assignments (RW Task 573-A) will not be automatically applied to the UAT environment

for UAT Full. Only the end user role assignments included in the *<Agency> Role Mapping* worksheet will be loaded into the UAT environment for UAT Full.

Your agency Security Access Manager (SAM) can provide a current CMS Wave/Production End User Access Report for current Florida PALM end users and their role assignments. Review this report to determine if any of your future end users are 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 end user and their CMS Wave roles.

UAT Online for SMEs will begin during the duration of this task. Once UAT Online begins, your agency SAM will also be able to pull a UAT End User Access Report for those SMEs who were loaded for UAT Online. Your SAM will have the ability to make role assignment changes to your UAT SMEs in the UAT environment, if needed. As role changes are made in the UAT environment, you should ensure the necessary updates are also being maintained in your *<Agency> Role Mapping* worksheet. Your SAM can provide regular UAT User Access reports to support the reconciliation efforts that may be required between the any role changes in the UAT environment and the role mapping worksheet.

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)
 - 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.
 - 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.

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

NOTE: *The following columns have been prepopulated with data from your <Agency> Implementation End User Worksheet.*

- **UAT SME** (locked from editing)
 - This column indicates the UAT SMEs that were previously role mapped.
- **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.
 - The selections made to this column are tied to the conditional formatting rules for the *<BPG> End User Role(s)* columns. The rules are described in the next section below.
- **Topic** (Optional for each end user)

- Select the applicable topic(s) for that end user based on the end user's job functions.
- **Office/Bureau/Section** (Required 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 #** (Required 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** (Required 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** (Required for each end user)
 - Provide the location within your agency that the end user's position exists.

NOTE: *Vacant positions should not have any end user roles assigned. Any vacant positions included in the task submission will not be included in the end user load for UAT Full because a user profile requires a person's name and email address for loading.*

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) cell is shaded gray, this business process grouping is not selected for this end user in Business Process Grouping(s) column, 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 Business Process Grouping(s) column for the end user.
 - Gray cells should be blank and not contain any data.
 - 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.

Department of Financial Services
Task 573-B – Complete and Submit End User Role Mapping Worksheet for Remaining End Users

- If you need to update the business process grouping applicable for the end user, you must make the update in the Business Process Grouping(s) column for the end user.
 - If any <BPG> End User Role(s) cells are 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.
 - Any cells with SOD conflicts will remain red.
- **SAM** (Locked from editing)
 - Any end users who are also an agency SAM will be identified with a check mark.
 - If there are changes with your agency SAM and an update is needed in this worksheet, you must **notify your Readiness Coordinator**.
 - Prior to making any changes to your worksheet, your Readiness Coordinator will validate your agency SAMs by reviewing the approved [SAM listing](#).
 - There are many end user roles that are in conflict with the SAM role, as described in the [SAM Role Article](#) and the SOD Conflict Matrix attached to the [Role Assignment Overview](#).
 - End users who are also SAMs should only be assigned reporter or viewer roles.
- **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.

- **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)
 - This column contains a drop-down list of all Org Security Rules provided in your <Agency> Org Security Rule configuration worksheet.
 - Any updates to the <Agency> Org Security Rule configuration worksheet will be available through nightly processing.
 - 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.
- 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 and the cells should remain blank.
 - The cells will turn yellow if your agency has Org Security Rules configured and the end user has been assigned AM, AP, or PO roles. The cells will remain yellow until an Org Security Rule is selected from the drop down.
 - The cells will turn red, indicating a conflict in the Org Security Rule, if an end user has been assigned the ‘Agencywide’ Org Security Rule along with additional Org Security Rules.

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.

- **Is DW/BI access needed?** (Required for all end users)
 - 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.
 - 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)
 - 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 Projects Data
 - DW/BI Information Warehouse Data
 - When choosing Payroll, access to protected data will automatically be given. When choosing Financials, you will need to specify whether access to protected data should be given in the “*DW/BI Access to Protected Data*” column.
 - 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)
 - Select the DW/BI role option needed for the end user.
 - Consumer
 - Author
 - 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)
 - 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.
- **DW/BI Access to Protected Data** (Required if 'Yes' is selected in the "Is DW/BI access needed?" column)
 - Indicate whether the end user is authorized to access unmasked protected data:
 - Yes
 - No
 - Conditional Formatting Rules:
 - If 'DW/BI Payroll Data' is selected in the "DW/BI Access Needs" column and/or 'Author' is selected in the "DW/BI Role Type" column and 'No' is selected in the "DW/BI Access to Protected Data" column, the cell will turn red.
 - Any DW/BI user with access to Payroll Data or with an Author role must have access to protected data.
 - Guidance for granting access to DW/BI protected data:
 - The following are the protected data included in the indicated DW/BI folders:
 - Financials – Some data within Asset Management and Accounts Payable is considered protected
 - Payroll – All data in the folder is considered protected
 - Projects – No data in the folder is considered protected
 - Information Warehouse – No agency data in the folder is considered protected
 - DW/BI Authors need authorization for access to protected data
- **Comments** (Optional for agency use)

How will agencies use this information?

Agencies will use this worksheet to submit end user role assignments for UAT Full. After this task, the <Agency> Role Mapping worksheet will remain open for maintenance until cutover, at which time the worksheet will be used to load end users and roles for go-live.

NOTE: Agency SAMs should support the effort to maintain the <Agency> Role Mapping worksheet with role changes that are made in the UAT environment by regularly reviewing and reconciling using the UAT User Access Report.

Use your <Agency> Role Mapping worksheet to continue preparations for UAT Full. You will need to prepare your end users for UAT Full 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.

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 for UAT Full. The loading of roles in preparation for UAT Full 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 Full in December.

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 end users 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 all end users for UAT Full.

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 the End User Role and DW/BI information provided in the Knowledge Center and determine the roles and data access needs for each end user.
2) Work with each impacted division/office to review and complete the <Agency> Role Mapping Worksheet in Smartsheet.

Summary of Task Completion Steps

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| 3) <i>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> |
| 4) <i>Complete task by December 19, 2025.</i> |
| 5) <i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i> |
| 6) <i>If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.</i> |

Supporting Materials & Resources:

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