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 your Florida PALM end users and the roles those 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 description and responsibilities, functions (i.e., applicable topics and activities from the Florida PALM Topics and Activities List), relationship to other roles, any role conflicts, and a Learning Path. The Role Assignment Overview article describes the importance of roles and assigning the correct roles in Florida PALM, as well as the learning available to users in that role. Included in the article are the following resources to 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.

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SOD conflict governance will be strictly enforced by DFS A&A after go-live, per CFO Memo 34. Any SOD conflicts will require approval by A&A to be loaded for go-live. To request approval for a SOD Conflict, the agency Security Access Manager (SAM) must fill out form DFS-A0-1000 and must have it approved by agency Finance and Accounting leadership. The completed form must be sent to Access2PALM@MyFloridaCFO.com, for A&A review, no later than Friday, November 13, 2026. Included in every request, the agency SAM must provide justification for the conflicting role and thorough mitigation strategies for verifying that no unauthorized actions are occurring systematically.

***NOTE**: Requests that fail to include any supporting information will be denied. A&A may request follow-up information to assist in reviewing requests.*

Any user or role changes required between final submission on November 30 and go-live will need to be tracked by your agency SAM and updated in the Production environment at go-live following the standard access update processes.

Worksheet Instructions

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

***NOTE**: Your role mapping worksheet in Smartsheet is not connected to the UAT environment. Changes made to your role mapping worksheet do not automatically update end user access in UAT. Agency SAMs must make any necessary access changes for end users in the UAT IAM tool.*

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 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.
    - Any end users that require a Bank Security role based on role assignment, but the "*Bank Security Role*" column is blank.
    - Any end users that are indicated as a "MFMP/STMS Enterprise System User Only" but have more than the Agency AP Processor role assigned.
- **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 validation 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 you are unable to remove the SOD conflict, you must receive an exception from A&A.
    - Cell will turn green if the SOD Conflict(s) Approved by A&A column has been checked. The Project will review all SOD Exception forms to confirm the SOD conflicts have been approved by A&A to be loaded into UAT.

NOTE: *The SOD Errors field being green indicates that the Project must review the attached SOD Conflict Request Form for accuracy and completion.*

- **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 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** (Locked from editing)
  - Auto populated with the applicable topics for the end user based on the roles assigned.
  - Updated via overnight processing.
- **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 credentialling 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.

- **MFMP/STMS Enterprise System User Only** (Optional)

  - Indicate if the end user is intended to be a MFMP or STMS user only, which requires a Florida PALM role to support the integration with the enterprise system.
  - End user must only have the Agency AP Processor role to be considered an 'Enterprise System User Only'.
  - Users indicated as an 'Enterprise System Only' will not be required to complete End User Training since the end user is not intended to be accessing Florida PALM.
  - The Role Assignment Overview provides more information of the role required for these enterprise system users.
- **<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. Your agency SAM can also view your agency's DW/BI license allotment and license usage in UAT on the *SAM Access Reference* page within the UAT Customer Portal.

***NOTE**: You must stay within your DW/BI license allotment. If you exceed your DW/BI license allotment in the role mapping worksheet, an error will populate in the DW/BI Error Messages 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 Payroll 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.

    NOTE: *Failure to confirm (i.e., select this box) will mean that sensitive roles will not be set up for the user at Go Live.*
- **Bank Security Role Confirmation** (Required for all end users that have roles that require the Bank Security Role)
    - Indicate understanding that the end user will be granted a Bank Security Role, which grants access to agency bank accounts to perform necessary functions, such as view bank data on applicable transactions (e.g., deposits and payments), and view banking reports
    - The End User Role Listing indicates which end user roles have access to sensitive data with a checkmark in the "Bank Security Role Needed?" 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 Role Listing
- End User Role Conflict Listing
- Agency SOD Conflict Matrix
- End User Role Articles
- Reporting Solution
- Organization Security

- Org Security Rule
- CFO Memo 34
- SOD Conflict Request Form