

Florida **PALM**

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

FEBRUARY 26, 2026



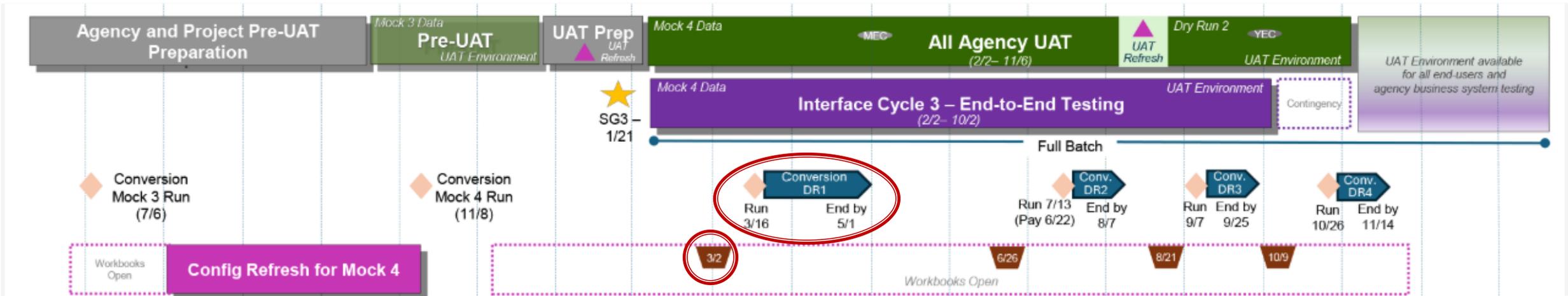
Agenda

- ▶ Convergence Updates
- ▶ Separation of Duty (SOD) Conflicts – CFO Memo #34
- ▶ Task Spotlight: 672 – Submit Monthly Progress Report
- ▶ Reminders
- ▶ Questions



Convergeration Updates

- **Conversion and Configuration workbooks will close on 3/2 for Dry Run 1**
 - Review your Agency Consolidated Error Message Report AND **each worksheet**. The Error report **does not** reflect conditional formatting errors within sheets.
 - Critical that you are aware of **updates dependent upon an API run** and ensure those are completed today to be available for final edits or selection tomorrow.
- **Data Cleansing (RW Task 597) must be complete by 3/13**



Role Mapping and SOD Conflicts

CFO Memo #34 – Effective 2/23/2026

- SAMs must get prior approval from A&A before assigning roles that create SOD conflicts - Form **DFS-A0-1000**
 - Justification for the conflicting roles.
 - Mitigation strategy to monitor that no unauthorized actions take place or improper activities occur in the system.
 - Date when SOD conflict would be resolved.
 - Approval of agency Finance and Accounting leadership.
- SOD conflicts will be granted for 60 days or less. If additional time is requested, the A&A Division Director will review for authorization.
- If SOD conflicts are assigned prior to approval - the roles will be removed by the Governance Administrator (A&A) and SAM will be notified accordingly.

UAT Impact

- Keep Role Mapping Worksheets up to date and monitor for SOD conflict errors
- SAMs can also use Active SOD report to identify current SOD conflicts in UAT
- SOD conflict approvals must be obtained and documented prior to UAT refresh to be loaded at the next end user load (UAT Refresh)



Role Mapping and Org Security

Org Security

- Org Security is applied only in the AP, PO, and AM modules
- Any users with roles for those modules must have an Org Security Rule or be indicated as Agencywide
- SAMs must submit a service catalog request to add or modify Org Security to agency users
- All new users with AP/PO/AM roles that are added to UAT will require a request for Org Security
- Keep role mapping worksheet up to date

New ORG Security Reports

- 4 new reports available for Agency SAMs to support maintenance and tracking of Org Security
- Reports will be available in Florida PALM – Not the IAM Tool/SAM Portal
 - **ORG_AGENCYWIDE** report shows all users who either have Agencywide or ORG Rule applied
 - If an agency does not have Org Rules established and are only agencywide, they would only need to use the ORG_AGENCYWIDE report. The other reports would be blank.
 - **ORG_RULES** report shows all the rules the agency has configured in the environment
 - **USR_ORG** report shows only users with ORG Rules applied and shows all orgs that those users have access to. Agencywide users do not show up on this report.
 - **USR_ORG_RULES** report shows Org Rules that have been applied to users.
- Process steps for accessing reports to be published to the Knowledge Center



672 – Submit Monthly Progress Report

Due Tomorrow

Task Elements & Updates

- Review Cycle 2 Technical Testing and Cycle 3 Full Integration Testing Progress (New)
- Review UAT Execution Progress – User Story Testing, Role Mapping, Prerequisite Training, UAT Attendance
- Review/Update Conversion and Data Readiness Progress
- Agency Sponsor submits

Task Resources

- ✓ Understanding Your Bimonthly Status Report Dashboard
- ✓ Incomplete Cycle 2 Testing & Cycle 3 Full Integration Testing Supplemental
- ✓ User Story Inventory for Progress Reporting Supplemental
- ✓ Change Analysis Tool for Progress Reporting Supplemental

DEMO Progress Report - Testing						
February 2026						
Interface Cycle 2 - Technical Testing						
Incomplete Cycle 2 Testing Report						
Agency Business System	Florida PALM Interface Name	Interface Direction	Status	If not started, what is the expected start date?	Planned testing completion date?	What are the current blockers to being complete?
DEMO	API002 - Inbound Voucher Load	Inbound	In Progress			
DEMO	API006 - Inbound Payment Cancellation	Inbound	Not Started			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	In Progress			
DEMO	API031 - Outbound Voucher and Payment Extract	Outbound	Not Started			

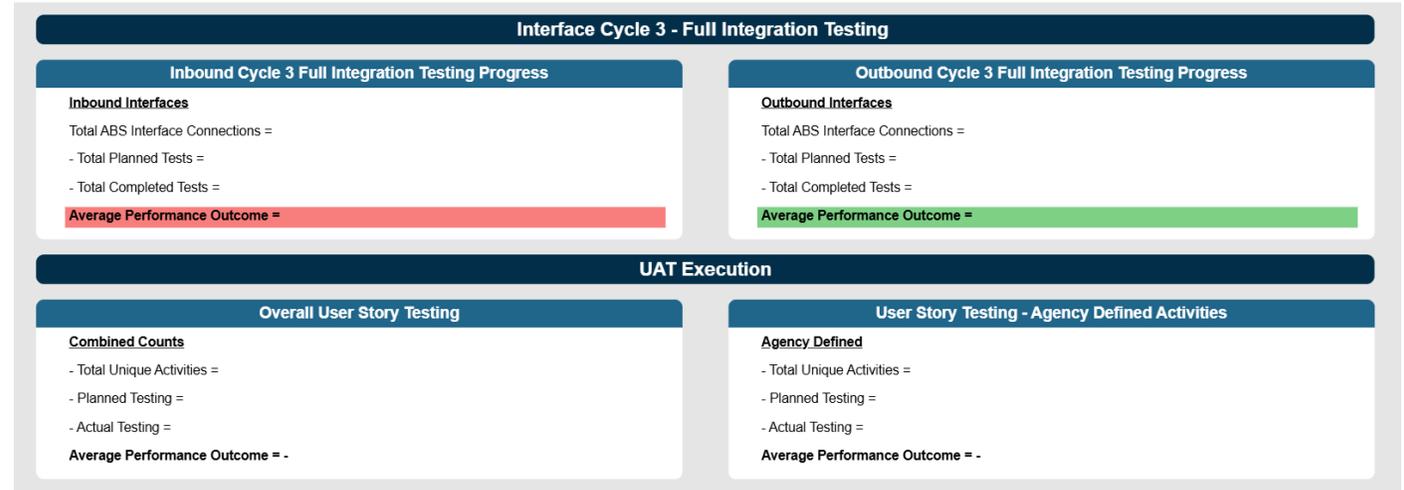


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Cycle 3 Interface & User Story Testing Dashboard Scoring

✓ An average score and color will be displayed on the Dashboard based on Performance Outcome



Performance Outcome	Assigned Value	Range for Average Rating	Color Indicator
Above Expectations	30	23.51 – 30.00	Green
Satisfactory	20	17.51 – 23.50	Green
Inadequate	10	10.00 – 17.50	Red
N/A	Not factored in scoring	Not factored in scoring	N/A

Reminders

Current Tasks Due Dates:

Friday, February 27

- ✓ 674 – Submit Monthly Progress Report

Monday, March 2

- ✓ **Conversion and Configuration workbooks will close on 3/2 for Dry Run 1**

Friday, March 13

- ✓ 597 – Complete Data Cleansing Based on Mock Conversion 4



Questions?

UAT
HAS STARTED!

Read more about
User Acceptance Testing
in the **KNOWLEDGE CENTER**

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