Florida PALM

Planning, Accounting, and Ledger Management

BLAISE INGOGLIA
CHIEF FINANCIAL OFFICER
STATE OF FLORIDA

Adding or Removing DW/BI Roles

May 14, 2026

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Adding or Removing DW/BI Roles
Overview

Data Warehouse/Business Intelligence (DW/BI) roles provide varying access to data, reporting capabilities (Consumer versus Author), and restrictions for security including business unit, organization, and data, where applicable.

- **Consumer** roles are intended for general users of the available DW/BI reports. Consumers can leverage the report selection parameters to produce information relevant to them.

- **Author** roles have all the privileges available to the Consumer roles and can create and modify reports. The Author role is intended for end users who are skilled in query writing and who understand the agency's data; both sensitive or confidential. These are typically your super users or problem solvers who regularly support agency self-service reporting.

The DW will replace the legacy Information Warehouse (IW) which will be retired with the transition to Florida PALM. Visit the Florida PALM Knowledge Center for more details on DW/BI.

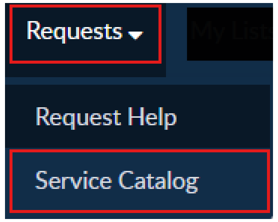
To add or remove DW/BI Roles from a user, an agency SAM must complete the DW/BI Service Request Form located on the Testing Customer Portal. This document provides instruction for completing and submitting a form. Upon submission, the form becomes a ticket within ServiceNow, assigned a UAT ticket number (e.g., UAT1234567).

Adding or Removing DW/BI Roles

Locating the Request Form

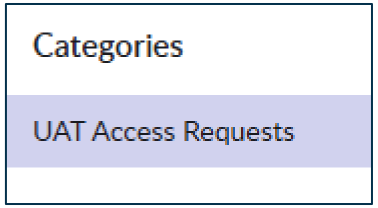
1. Log into the Florida PALM Testing Customer Portal (https://flpalmprd.service-now.com/uat)

2. From the **Requests** dropdown, select **Service Catalog**

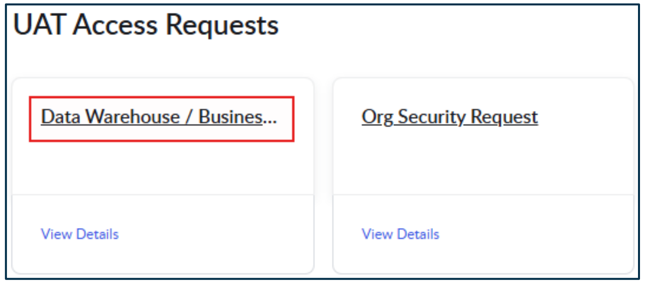


Note: The Service Catalog option is role based,
and available to agency Security Access Managers (SAMs)

3. Select the **UAT Access Requests** Category



4. Select the **Data Warehouse/Business Intelligence (DW/BI)** Tile



Adding or Removing DW/BI Roles

Completing the Request Form

5. Enter the **User's ID**.

6. The User's **Agency** name will auto-populate.

7. Enter the **User ID's Email** address.

8. Enter the **User ID's Phone Number**.

Data Warehouse / Business Intelligence (DW/BI) Access Request

* Indicates required

The DW/BI offers reports, reporting tools, and access to Florida PALM and legacy FLAIR IW data. The two main types of roles are Consumer and Author. Author roles will be available in the near future. These roles are independent of the Florida PALM roles. More information about DW/BI User roles can be found Knowledge Center!

*User ID For: Example: Crystal.Miller-DFS

Agency:

*User ID Email:

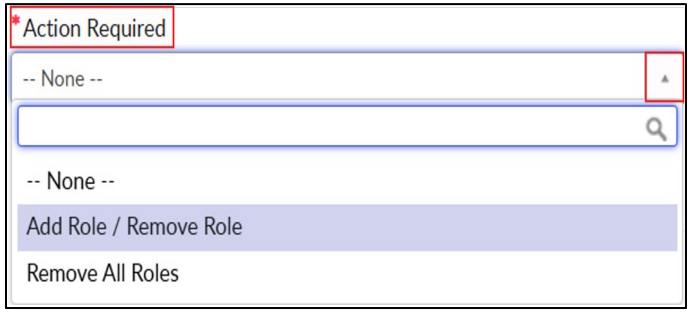
*User ID Phone Number:

Adding or Removing DW/BI Roles

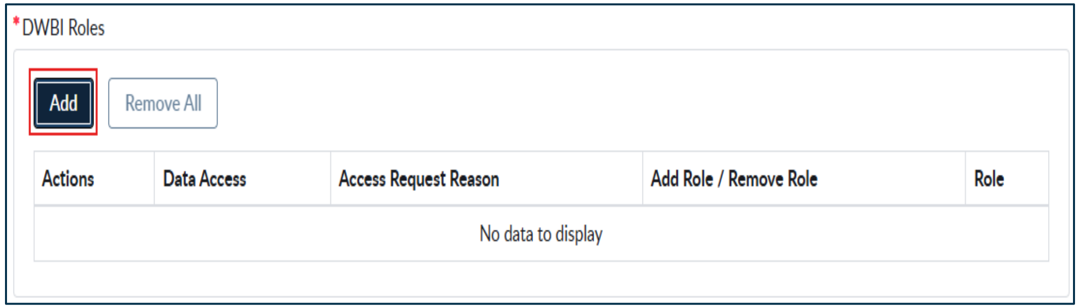
Completing the Request Form

9. From the **Action Required** drop down, select **Add Role / Remove Role** to add or remove a DW/BI role.

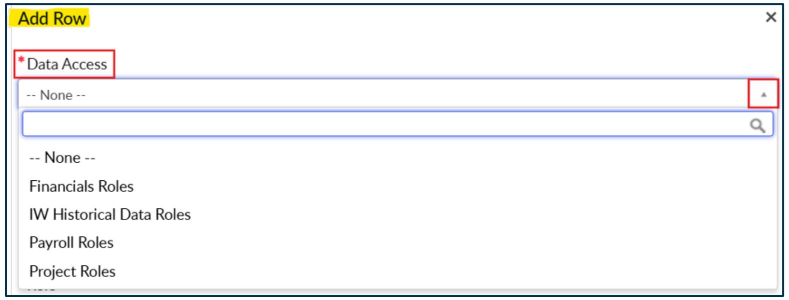
Note: Users can request to Add or Remove Roles within the same ticket.



10. Click the **Add** button to create a new entry.



11. An **Add Row** window opens which allows the user to select the **Data Access**.



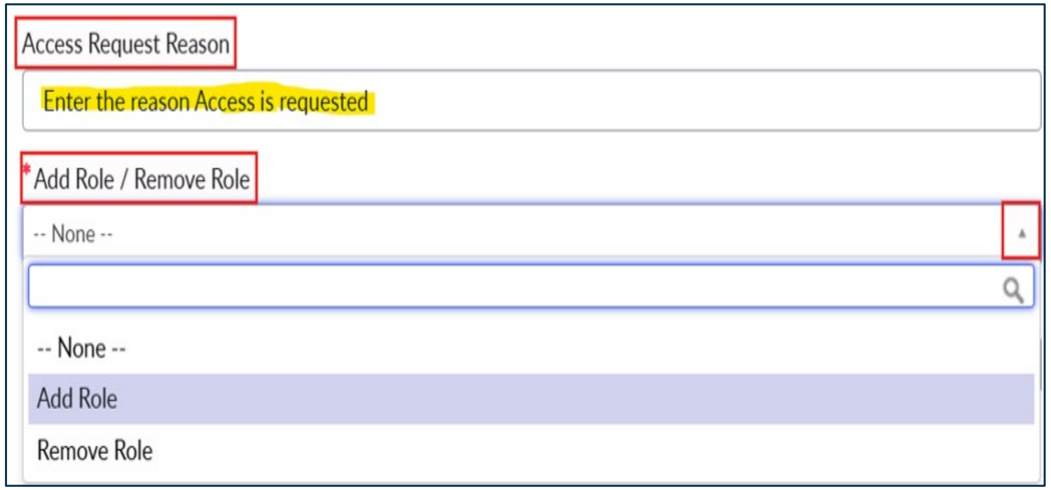
Adding or Removing DW/BI Roles

Completing the Request Form

13. Enter the reason Access is being requested, as it relates to the user’s roles and responsibilities.

For example, if the Data Access selected is **Payroll Roles**, the Access Request Reason may be ‘*User needs payroll access to audit/view agency payroll data to perform daily duties*.’

Note: An Access Request reason is required for IW Historical Data Roles, Payroll Roles and Project Roles; however, an Access Reason is not required for Financials Roles.



14. If Adding a new role, select **Add Role** from the drop-down options.

15. Select **Remove Role** from the drop-down options if a role was previously submitted, exists on the User’s profile in the system, and now needs to be removed.

Adding or Removing DW/BI Roles

Adding Roles to the Request

16. Enter the **Role** being added.

Note: The available **Roles** are dependent upon the Data Access selected in Step 11.

* Role

-- None --

Data Access	Role Type			
	Agency Consumer Roles	Agency Author Roles	Enterprise Consumer Roles	Enterprise Author Roles
Financials	• DW/BI Agency Financials Consumer Public • DW/BI Agency Financials Consumer Public Org Restriction • DW/BI Agency Financials Consumer Protected • DW/BI Agency Financials Consumer Protected Org Restriction	DW/BI Agency Financials Author Protected	• DW/BI Enterprise Financials Consumer Public • DW/BI Enterprise Financials Consumer Protected	DW/BI Enterprise Financials Author Protected
Payroll	DW/BI Agency Payroll Consumer Protected	DW/BI Agency Payroll Author Protected	DW/BI Enterprise Payroll Consumer Protected	DW/BI Enterprise Payroll Author Protected
Projects	DW/BI Agency Project Costing Consumer Public	DW/BI Agency Project Costing Author Public	DW/BI Enterprise Project Costing Consumer Public	DW/BI Enterprise Project Costing Author Public
IW Historical Data	DW/BI Agency IW Consumer Public	DW/BI Agency IW Author Public	DW/BI Enterprise IW Consumer Public	DW/BI Enterprise IW Author Protected

*Data security is applied for any sensitive or confidential data in the DW/BI. Such information is generally limited, but where it is used, only authorized users can view the "**Protected**" data. Users assigned to the "**Public**" role variations can only view publicly available information, and where sensitive or confidential data is included in a report it will be obfuscated or masked.*

This table, located in the Knowledge Center, shows the available DW/BI roles.

17. Click the **Add** button to complete the action or **Cancel** button to terminate the action. Clicking either of the Add or Cancel buttons will return the user to the previous page.

Cancel Add

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Adding or Removing DW/BI Roles

Adding Roles to the Request

18. Repeat steps 11 - 17 to add or remove additional roles for the same user. As role selections are added or removed, they will display in a list.

Note: If changing a user from a Consumer to Author, be sure to remove all existing Consumer roles.

Add | Remove All

Actions	Data Access	Access Request Reason	Add Role / Remove Role	Role
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Public
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Protected
	Financials Roles		Remove Role	DW/BI Agency Financials Consumer Public Org Restriction
	Payroll Roles	User needs payroll access to audit/view agency payroll data to perform daily duties	Add Role	DW/BI Agency Payroll Consumer Protected
	IW Historical Data Roles	User needs access to IW historical data to perform monthly reconciliation	Add Role	DW/BI Agency IW Consumer Public

*Note: **Do Not** click the Submit button until all roles have been added or removed*

Adding or Removing DW/BI Roles

Editing Rows Before Submitting the Form

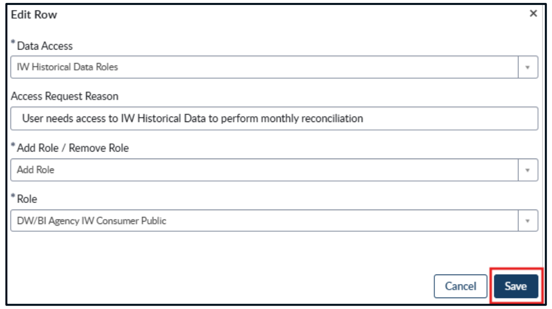
19. If a displayed role needs to be modified (e.g., to update an erroneous or misspelled word) click the edit icon on the applicable row.

Add | Remove All

Actions	Data Access	Access Request Reason	Add Role / Remove Role	Role
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Public
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Protected
	Financials Roles		Remove Role	DW/BI Agency Financials Consumer Public Org Restriction
	Payroll Roles	User needs payroll access to audit/view agency payroll data to perform daily duties	Add Role	DW/BI Agency Payroll Consumer Protected
	IW Historical Data Roles	User needs access to IW Historical Data to perform monthly reconciliation	Add Role	DW/BI Agency IW Consumer Public

20. An **Edit Row** window opens and allows the user to edit the erroneous data. Once all edits are made, click the **Save** button.

*Note: Selecting **Cancel** closes the window and loses all updates*



21. After saving, the edit(s) are reflected on the applicable row.

IW Historical Data Roles	User needs access to IW Historical Data to reconcile PALM data to Legacy data	Add Role	DW/BI Agency IW Consumer Public

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Adding or Removing DW/BI Roles

Removing Roles Before Submitting the Form

22. Review the Access Request list to confirm there are no additional DW/BI roles to be added/removed. To delete one or more roles displayed on the list, click the remove icon '**x**' on the applicable row(s). If all displayed roles in the table need to be deleted, click the '**Remove All**' button.

Note: *this action* ***does not*** *remove any existing DW/BI roles in the system, only the line from this request.*

Deleting one or more rows

*DWBI Roles

Add | Remove All

Actions	Data Access	Access Request Reason	Add Role / Remove Role	Role
✎ ✖	Financials Roles		Add Role	DW/BI Agency Financials Consumer Public
✎ ✖	Financials Roles		Add Role	DW/BI Agency Financials Consumer Protected
✎ ✖	Financials Roles		Remove Role	DW/BI Agency Financials Consumer Public Org Restriction

23.Confirm the deletion by clicking the **Remove** button. After confirming, the selected row(s) will be removed.

Removing all rows

*DWBI Roles

Add | Remove All

Actions	Data Access	Access Request Reason	Add Role / Remove Role	Role
✎ ✖	Financials Roles	testing	Add Role	DW/BI Agency Financials Consumer Protected
✎ ✖	IW Historical Data Roles	testing	Add Role	DW/BI Agency IW Consumer Public
✎ ✖	Project Roles	testing	Add Role	DW/BI Agency Project Costing Consumer Public

Are you sure you want to delete the row? X

Cancel | Remove

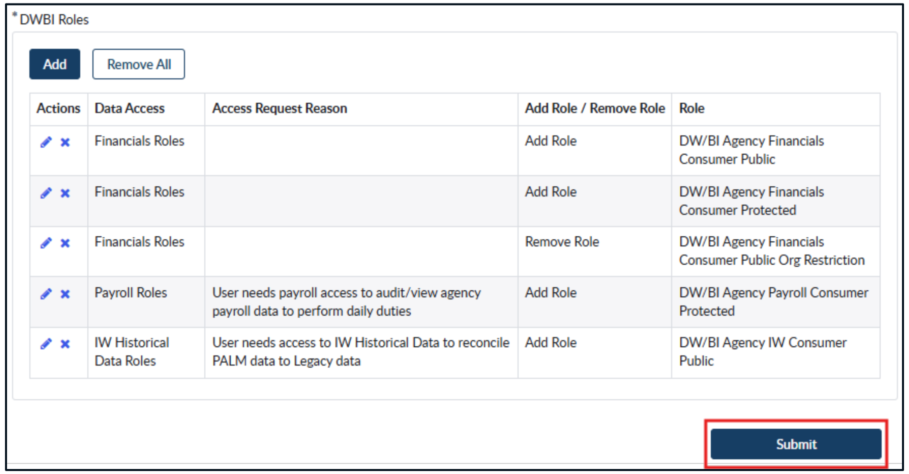
Are you sure you want to delete all rows? X

Cancel | Remove

Adding or Removing DW/BI Roles

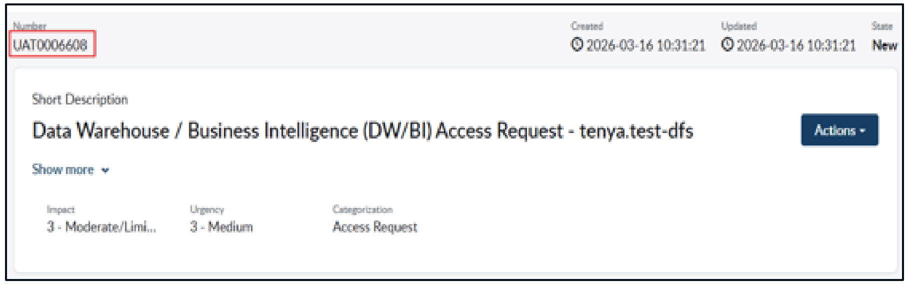
Submitting the Completed Request Form

24. When all roles have been added, removed, or modified, the form is ready to be submitted. Click the **Submit** button, found at the bottom of the page, to create the ticket.



Actions	Data Access	Access Request Reason	Add Role / Remove Role	Role
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Public
	Financials Roles		Add Role	DW/BI Agency Financials Consumer Protected
	Financials Roles		Remove Role	DW/BI Agency Financials Consumer Public Org Restriction
	Payroll Roles	User needs payroll access to audit/view agency payroll data to perform daily duties	Add Role	DW/BI Agency Payroll Consumer Protected
	IW Historical Data Roles	User needs access to IW Historical Data to reconcile PALM data to Legacy data	Add Role	DW/BI Agency IW Consumer Public

25. A UAT Ticket Number generates at the top of the page.



Adding or Removing DW/BI Roles

Completing a Form to Remove All Roles

26. If a User needs to **Remove All** DW/BI roles that were previously submitted and exists on the User's profile in the system, begin with step 6 and add the user's information.

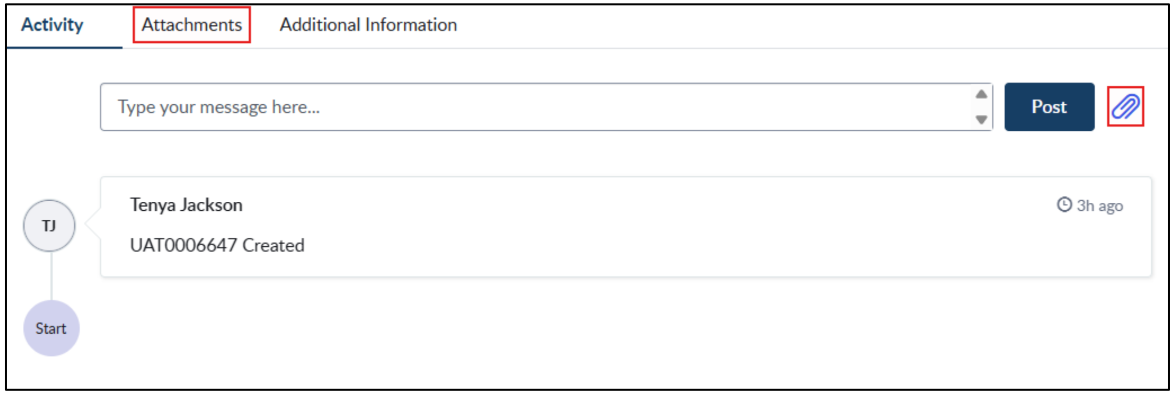
27. Then, select '**Remove All Roles**' from the '**Action Required**' drop down.

28. Click the **Submit** button after completion.

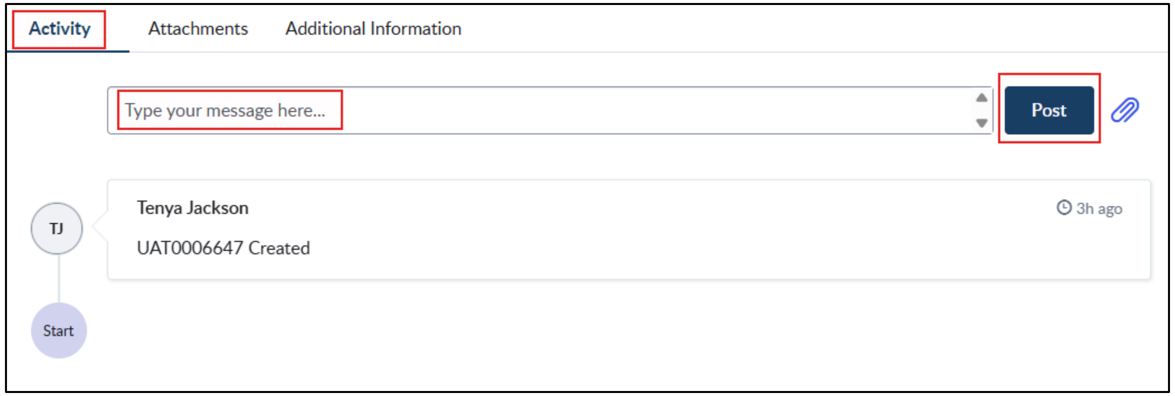
Adding or Removing DW/BI Roles

Managing with a Submitted Request

29. Attachments may be added to a previously submitted request (i.e., ticket) by clicking the paperclip icon or selecting the **Attachments** tab.



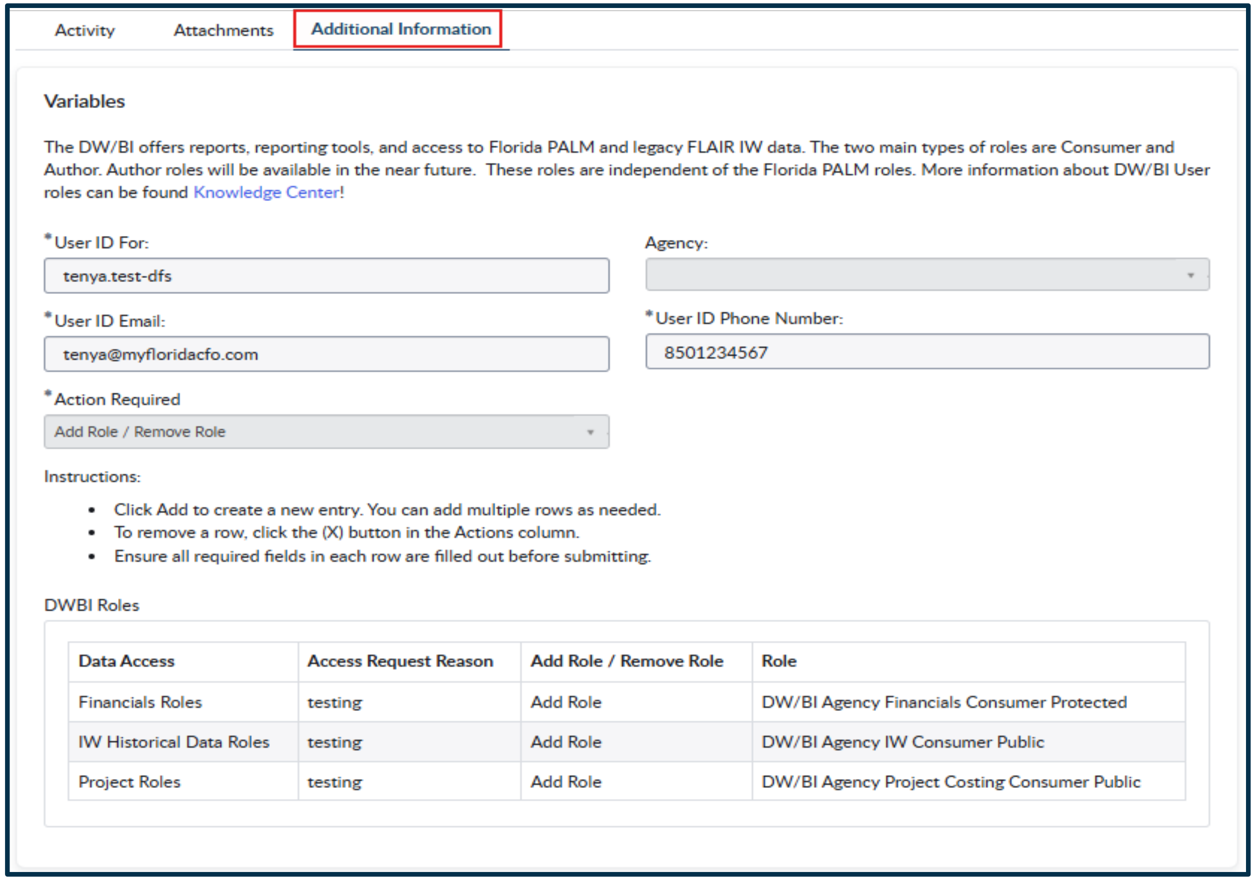
30. Direct communication between the customer and Florida PALM is enabled within the **Activity** tab. Type your message in the box and click the **Post** button.



Adding or Removing DW/BI Roles

Managing with a Submitted Request

31. Additional information about the ticket may be viewed by selecting the **Additional Information** tab.


Activity Attachments Additional Information

Variables

The DW/BI offers reports, reporting tools, and access to Florida PALM and legacy FLAIR IW data. The two main types of roles are Consumer and Author. Author roles will be available in the near future. These roles are independent of the Florida PALM roles. More information about DW/BI User roles can be found Knowledge Center!

*User ID For: tenya.test-dfs

Agency:

*User ID Email: tenya@myfloridacfo.com

*User ID Phone Number: 8501234567

*Action Required: Add Role / Remove Role

Instructions:

- Click Add to create a new entry. You can add multiple rows as needed.
- To remove a row, click the (X) button in the Actions column.
- Ensure all required fields in each row are filled out before submitting.

DWBI Roles

Data Access	Access Request Reason	Add Role / Remove Role	Role
Financials Roles	testing	Add Role	DW/BI Agency Financials Consumer Protected
IW Historical Data Roles	testing	Add Role	DW/BI Agency IW Consumer Public
Project Roles	testing	Add Role	DW/BI Agency Project Costing Consumer Public

CONTACT US

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