

Task Instructions

Task ID: 610

Task Name: *Update Authorized Smartsheet Users*

Task Start Date: *June 23, 2025*

Task Due Date: *July 11, 2025*

Project Impact: *N/A*

Task Description

Review, update and confirm authorized users' access to all Florida PALM Smartsheet resources.

Task Overview

As stated in the CCN Roles and Responsibilities document, primary and backup Agency Liaisons and Project Management Liaisons are expected to “Manage agency user access to agency and Project information in Smartsheet.” To help meet that expectation, Agency Liaisons and Project Management Liaisons are assigned the ‘Editor – Can Share’ role in your Florida PALM Agency Workbooks and are required to manage access to your agency-specific workbooks in Smartsheet. This task requires Agency Liaisons and Project Management Liaisons to review and update authorized agency Smartsheet users.

NOTE: A new workbook has recently been added for all agencies titled *Florida PALM Archive* for <Agency>. All archived folders and worksheets have been moved to this new workbook. Your agency must manage access for both workbooks within Smartsheet. Follow the steps below for both the agency workbook and the agency archive workbook to ensure the correct access has been granted for both.

Task Elements

First, you will need to see who currently has access to your agency-specific workbooks in Smartsheet. To do so, go to Smartsheet and select your agency-specific workbook. On the far-right side, you will see a column titled “Workspace Shared To.” This column shows who currently has access to your agency-specific workbook and their permissions (Figure 1 below).

The screenshot shows the Smartsheet interface for the 'Florida PALM Workbook for DEMO'. On the right side, the 'Workspace Shared To' panel is open, displaying a list of users and groups who have access to the workbook. The panel is highlighted with a red box. The list includes:

- Florida PALM** (Owner)
- floridapalmtest@outlook.com** (Editor - can share)
- steven.fielder@myfloridacfo.com** (Editor - cannot share)
- Angie Robertson** (Editor - cannot share)
- Florida PALM Readiness Coordinators (Group)** (Editor - cannot share)
- Jimmy Cox** (Editor - cannot share)
- Tatiana Eubanks** (Editor - cannot share)
- flptest21@outlook.com** (Viewer)

The main table in the background shows the following data:

| Name | Sharing | Owner | Last Update |
|------------------------------------|-----------|--------------|--------------|
| Agency Readiness | Workspace | Florida PALM | 04/27/23 |
| Archive (Reference Only Materials) | Workspace | Florida PALM | 08/10/23 |
| Data Security and Access Survey | Workspace | Florida PALM | 01/19/23 |
| Inventories | Workspace | Florida PALM | 04/27/23 |
| Status Reporting | Workspace | Florida PALM | 07/21/23 |
| Templates | Workspace | Florida PALM | 05/16/23 |
| Allotment Control Option Selection | Workspace | Florida PALM | 19 hours ago |

Figure 1: Shared Workspace

After viewing who has access and their permissions, you can decide if updates need to be made. To make updates, select the 'Share' button located on the far right-hand side. A new box will appear called 'Workspace Sharing.' Here, you can remove access, add more individuals, and update permission settings (Figure 2). Once you make all appropriate updates, select the 'Close' button and it will be saved.

NOTE: When updating permissions, you should only select "Editor – Cannot Share" or "Viewer" access. Only the Agency Liaisons and Project Management Liaisons should have the "Editor – Can Share" access.

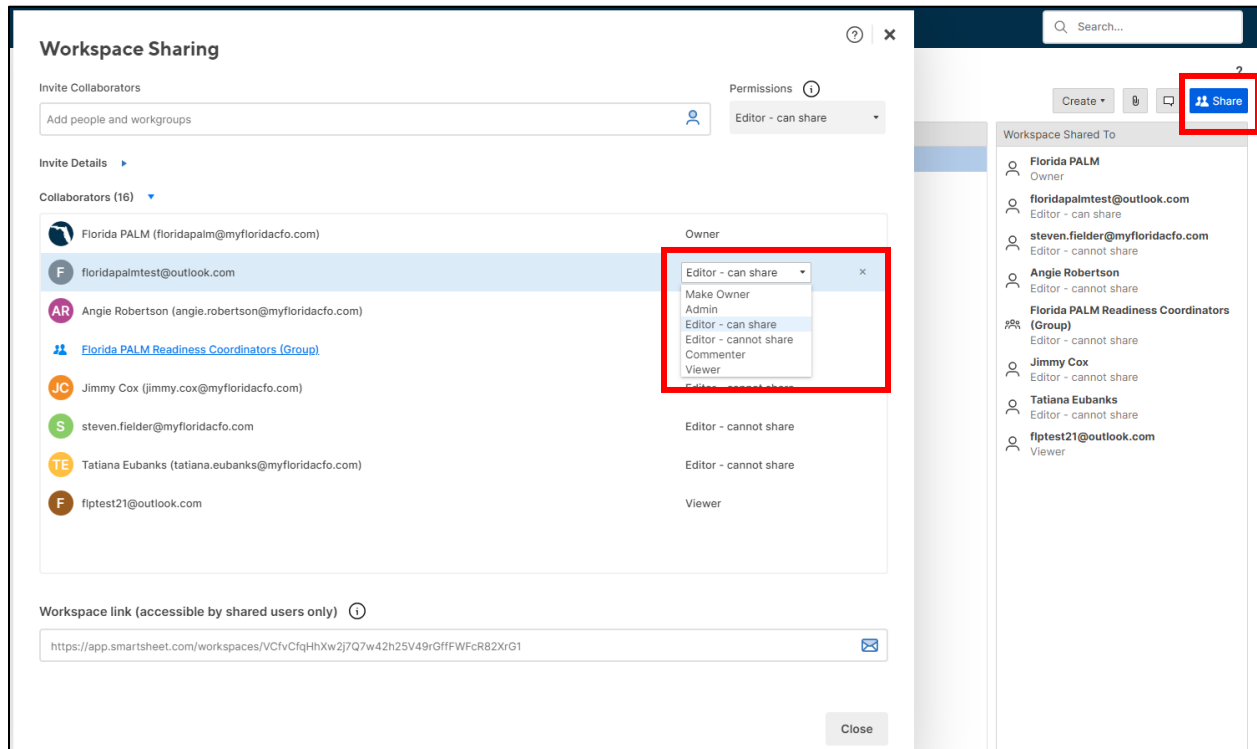


Figure 2: Workspace Sharing

If new members need to be added, please see the [Smartsheet User Guide](#) for more information on setting up a new account and more in-depth information on Smartsheet.

How will agencies use this information?

You will use this information to ensure the correct individuals have the necessary access to your agency's Florida PALM workbook. Agency Liaisons and Project Management Liaisons can make necessary Smartsheet access updates at any time.

What will the Florida PALM Team do with this information?

The Florida PALM team will continue to allow the Agency Liaisons and Project Management Liaisons to manage Smartsheet access for agency users. The Florida PALM team will review your task submission based on the following criteria to confirm completion:

Table 1: Task Completion Rubric

| Task Completion Rubric |
|--|
| Task tracker has been marked as 100% complete. |

Task Instructions

This task requires multiple steps for completion. Agency Liaisons and Project Management Liaisons should:

1. Review who currently has access to your Florida PALM Workbook for <Agency> and Florida PALM Archive for <Agency> Workbook.
2. Decide if the person's access should:
 - a. Remain the same;
 - b. Be removed; or
 - c. Be updated to 'Editor – Cannot Share' or 'Viewer'.
3. Add other CCN members who need access to your Florida PALM Agency Workbook.

As a reminder, your Florida PALM agency workbooks are a protected series of worksheets and can only be accessed by staff you have designated. Users with editing access to your agency-specific worksheets should be tightly controlled and limited to maintain data integrity. Smartsheet does not offer version history or the ability to revert back to a previous version after a worksheet has been changed and saved.

Smartsheet resources are linked below, which can provide a refresher on how to access and use the tool. Update and confirm your agency user Smartsheet access by the requested due date.

Table 2: Summary of Task Completion Steps

| Summary of Task Completion Steps | |
|---|---|
| 1) | <i>Agency Liaisons and Project Management Liaisons collaborate to identify if any changes need to be made to authorized Smartsheet users and make updates, as needed.</i> |
| 2) | <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.</i> |
| 3) | <i>Complete task by July 11, 2025.</i> |
| 4) | <i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i> |
| 5) | <i>If you have questions regarding this task, review the "Granting and Removing Access in Smartsheet" and "Creating a Smartsheet Account" videos, contact your RC, or participate in the Thursday Task Talks.</i> |

Supporting Materials & Resources:

- [Creating a Smartsheet Account](#)
- [Granting and Removing Access in Smartsheet Video](#)
- [Smartsheet User Guide](#)