

FloridaPALM

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

MARCH 26, 2026



Agenda

- ▶ Task Spotlight: 696 – Maintain Role Mapping Worksheet
- ▶ Prerequisite Training Update
- ▶ Reminders
- ▶ Questions



696 – Maintain Role Mapping Worksheet

Due 4/30/2026





What is new?

➤ SOD Conflicts



- SOD conflicts must be resolved or granted an exception status by A&A
- New “SOD Conflicts Approved by A&A” column – check if approval has received AND attach form documenting the granted exception
- CFO Memo #34
- New Resource - [Agency SOD Conflict Matrix](#)

➤ DW/BI Columns

- Previous columns replaced with 4 new columns – single-select
- License allotment for your agency found in Tool Tip (FIN/PAY/Projects)
- Error message column to indicate when role mapping exceeds license allotment

DW/BI Financials Data Role	DW/BI Payroll Data Role	DW/BI Projects Data Role	DW/BI Information Warehouse Data Role
			

DW/BI Error Messages

[RT] Number of DW/BI Financials Data Roles assigned cannot exceed the number of DW/BI Financials licenses allotted.



696 – Maintain Role Mapping Worksheet

Due 4/30/2026

Review and Update Role Mapping Worksheet

- Ensure ALL future end users are listed with applicable roles.
- Review all error messages, conditional formatting, and missing information in your <Agency> Role Mapping worksheet.
- Review DW/BI user access and roles – DW/BI Error Messages column.
- Review and remediate SOD conflict errors – SOD Errors column.
- Work with your SAM to provide regular UAT User Access reports to reconcile access with your role mapping worksheet.

Resources:

- Role Mapping Supplemental for details on how to maintain your worksheet for UAT Refresh
- Knowledge Center: Role Assignment Overview, End User Role Conflict Matrix, Agency SOD Conflict Matrix, End User Articles.
- CFO Memo #34.



NEW Prerequisite Training

New prerequisite training video published and added to the Learning Path in LMS that provides information on using the **Knowledge Center** to support end user testing efforts in UAT. You can find by searching “The Knowledge Center”, or “FIN PAY” to see all available prerequisite trainings.

Best Practices:

- Agency Training Liaisons and UAT Coordinators ensure users are aware of their required trainings – Learning Paths.
- Guide users to access training in LMS – My Learning.
- Monitor and report progress in your < Agency > Prerequisite Tracking in Smartsheet.
- Verify all items are completed by end users – LMS Program Status Report
 - **UAT Participants are required to complete prerequisite trainings prior to attending workshops.**

Resources:

- Knowledge Center – UAT Prerequisites



Reminders

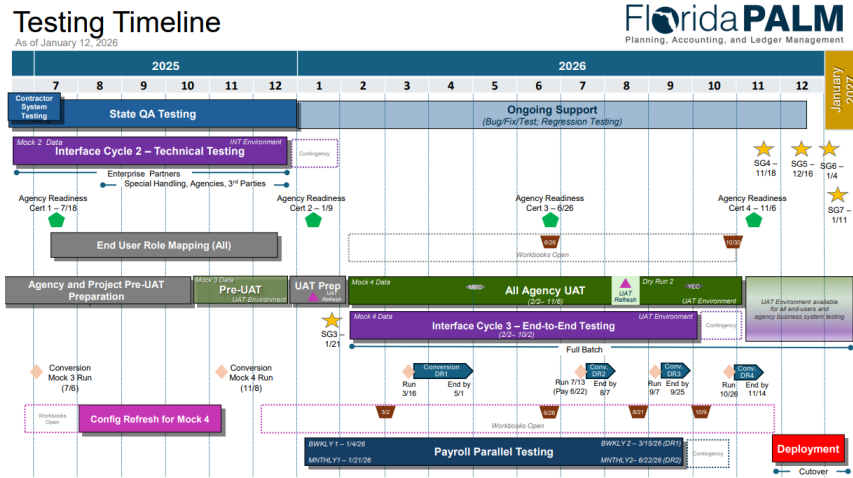
Current Tasks Due Dates:

Tuesday, March 31

✓ 674 – Submit Monthly Progress Report – Testing

Thursday, April 30

✓ 696 – Maintain Role Mapping Worksheet



Testing Timeline

BE PREPARED

To ensure a successful UAT experience, prepare yourself by completing these steps first.

- Complete the Prerequisites**
Find which trainings are required for your role(s) based on Business Process Grouping on the [UAT Prerequisites](#) page in the Knowledge Center.
- Confirm your UAT Access**
Before arriving at your assigned UAT session, confirm you are able to log into the [UAT environment](#). Log in from a remote location, outside of your network.
- Confirm your Role(s)**
Confirm with your SAM that you have been given the role(s) you'll need during your assigned UAT session. The [Pre-Materials](#) page on the Knowledge Center lists the roles needed for each UAT subject matter.
- Review the Pre-Materials**
Review the Process Steps and Demo Videos on the Pre-Materials page on the Knowledge Center. Become familiar with basic navigation and attempt to follow the Process Steps.
- Identify your Testing Support contacts**
Familiarize yourself with your agency [UAT Coordinators](#), your agency [SAM](#), and your [Testing Error Triage](#) team. These individuals will help with any environment access or role assignment issues, or with troubleshooting testing issues.
- Check the UAT Communications Page regularly**
The [UAT Communications](#) page in the Knowledge Center is your central location for UAT information. By "following" the page, you can be alerted when new messages or information is made available.



Episode 18 - Agency Sponsor Update: Testing Progress



Questions?



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KNOWLEDGE CENTER

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