

FloridaPALM

Planning, Accounting, and Ledger Management



ADDING OR REMOVING ORGANIZATION SECURITY ROLES

MAY 14, 2026



Adding or Removing Org Security Rules

Overview

Organization (Org) Security in Florida PALM is a control mechanism used to grant or restrict user access to specific transactional data based on Organization ChartField values. It allows agencies to define who can view, modify, or report on specific transactional data within the system by applying security rules aligned with organizational structures.

Org Security:

- Helps to ensure users can only access the financial information related to their defined values, preventing unauthorized access to data within the Accounts Payable (AP), Purchasing (PO), and Asset Management (AM) modules only.
- Is added or modified via a Service Catalog request by Agency SAMs.

Visit the Florida PALM Knowledge Center for more details on [Org Security](#)

To add or remove Org Security rules, an agency SAM must complete the Org Security 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, and assigned a UAT ticket number (e.g., UAT1234567).

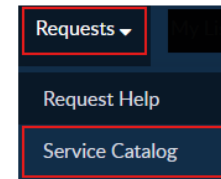


Adding or Removing Org Security Rules

Locating the Request Form

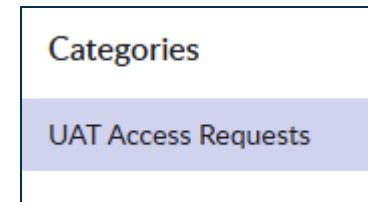
1. Log into the [Florida PALM Testing Customer Portal](https://flpalmprd.service-now.com/uat) (<https://flpalmprd.service-now.com/uat>)

2. From the **Requests** Dropdown, Select **Service Catalog**

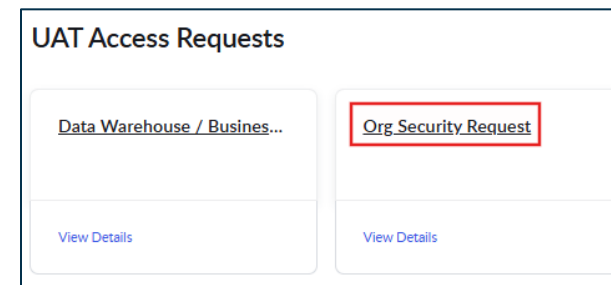


Note: The Service Catalog option is role based, and available to agency Security Access Managers (SAMs).

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



4. Select the **Org Security Request** Tile.



Adding or Removing Org Security Rules

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 Org Security Rules

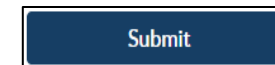
Adding Agencywide Rules to the Request

9. From the **Action Required** dropdown, select **Add New User – Agencywide** to grant the user agencywide Org access with no restrictions.
For example, Agencywide Org Security may be used for users who need to view all organization codes within the business unit.



The screenshot shows a web form with a dropdown menu labeled "Action Required". The dropdown is open, showing a search bar and a list of options. The first option, "Add New User - Agencywide", is highlighted in blue. Other options include "Add New User - Specific Rules", "Modify a User", and "Remove All Org Security Rules". The "None" option is also visible at the top of the list.

10. Click the Submit button after completion



A dark blue rectangular button with the word "Submit" in white text.

Adding or Removing Org Security Rules

Adding or Removing Specific Rules to the Request

11. From the **Action Required** dropdown, select **Add New User – Specific Rules** to grant the user Org Security with **Specific Rules**, and control which Org(s) users can access.



* Action Required

-- None --

-- None --

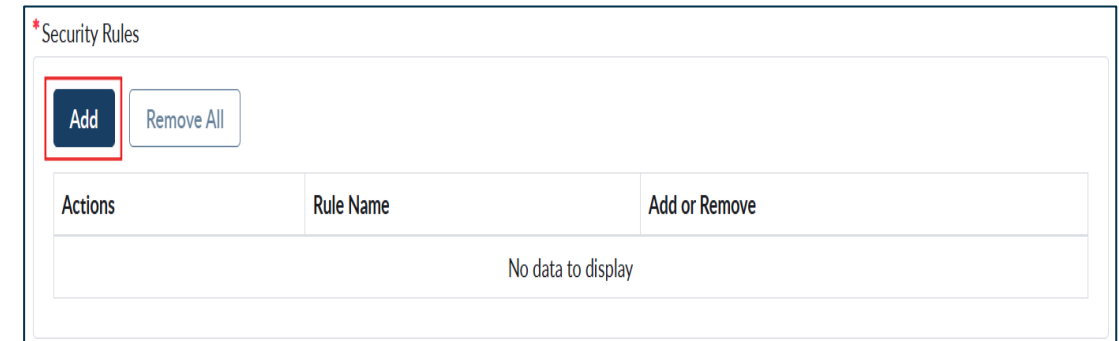
Add New User - Agencywide

Add New User - Specific Rules

Modify a User

Remove All Org Security Rules

12. Click the **Add** button to create a new entry where additional Specific Rules may be listed for action.



* Security Rules

Add Remove All

Actions	Rule Name	Add or Remove
No data to display		

Adding or Removing Org Security Rules

Adding or Removing Specific Rules to the Request

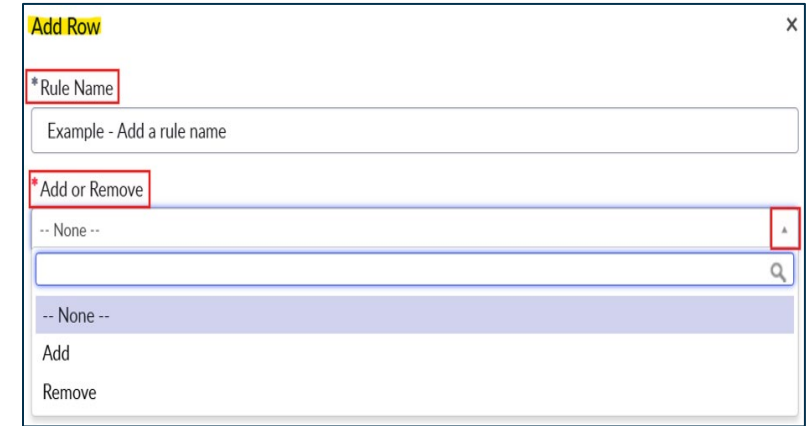
13. An **Add Row** window opens for input of the **Rule Name** as it relates to the user's roles and responsibilities.

For example, if the user has Payroll related roles, the **Rule Name** may be '**Payroll Team**'.

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

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

16. 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 (Org Security Request form).



Adding or Removing Org Security Rules

Reviewing the Request Form

17. A list of **Security Rules** requested to be added or removed will display. Before submitting, rules can be modified, added or removed from the list.

Org Security Request

*User ID For:
test.test-DFS

Agency:

*User ID Email:
test@testing.com

User ID Phone Number:
8771234567

*Action Required
Modify a User

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.

*Security Rules

AddRemove All

Actions	Rule Name	Add or Remove
	Example - PYRL data only	Remove
	Example - AP data only	Add
	Example - PO data only	Add
	Example - AM data only	Add

Submit

Adding or Removing Org Security Rules

Modifying a Current User's Rules

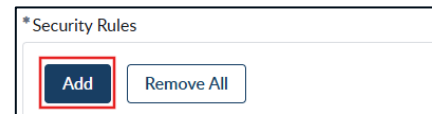
18. To Modify a User's rules, select **Modify a User** from the Action Required dropdown menu.

18.

A screenshot of a dropdown menu titled '*Action Required'. The menu is open, showing several options. The option 'Modify a User' is highlighted in blue. Other options include 'Add New User - Specific Rules', '-- None --', 'Add New User - Agencywide', 'Add New User - Specific Rules', and 'Remove All Org Security Rules'. A red box highlights the dropdown arrow icon on the right side of the menu header.

19. Click the **Add** button

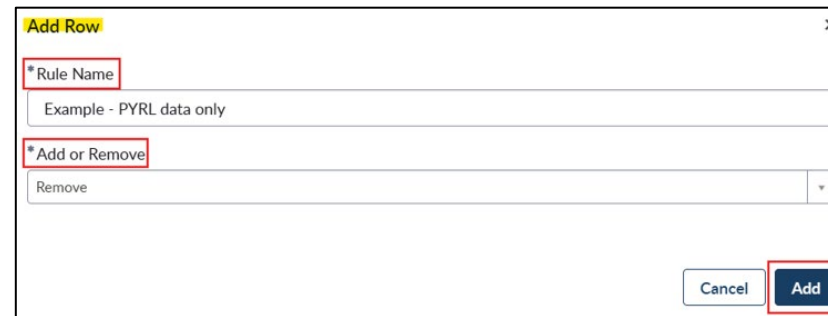
19.

A screenshot of a section titled '*Security Rules'. Below the title, there are two buttons: 'Add' and 'Remove All'. The 'Add' button is highlighted with a red box.

20. An **Add Row** window opens, allowing the user to:

- Enter the **Rule Name**, then
- **Add** or **Remove** a Rule
- Click the **Add** button to complete the action

20.

A screenshot of a window titled 'Add Row'. The window has a close button (X) in the top right corner. It contains two input fields: '*Rule Name' and '*Add or Remove'. The '*Rule Name' field has the text 'Example - PYRL data only' entered. The '*Add or Remove' field has a dropdown menu with 'Remove' selected. At the bottom right, there are two buttons: 'Cancel' and 'Add'. The 'Add' button is highlighted with a red box.

Adding or Removing Org Security Rules

Editing Displayed Security Rules

To edit Security Rules:

For example, to edit a mis-spelled word

21. Click the **Edit Row** icon



Actions	Rule Name	Add or Remove
 	Example - PYRL data only	Remove
 	Example - AP data only	Add
 	Example - PO data only	Add
 	Example - AAM Admin data only	Add

22. An **Edit Row** window opens, allowing the user to:

- Edit the **Rule Name**, then
- **Add** or **Remove** the Rule

23. Click the **Save** button to complete the action



Edit Row

*Rule Name

Example - AAM data only

*Add or Remove

Add

Cancel Save

Adding or Removing Org Security Rules

Removing Displayed Security Rules

Rules displayed in the **Security Rules** list can be removed consecutively or simultaneously.

To remove Security Rules consecutively:

24. Click the **Remove Row** icon

* Security Rules		
Add Remove All		
Remove Row	Rule Name	Add or Remove
	Example - PYRL data only	Remove
	Example - AP data only	Add
	Example - PO data only	Add

25. Confirm deletion of each row by clicking the **Remove** button. Repeat steps 24-25 until each row has been removed.

Are you sure you want to delete the row? ×

Cancel Remove

Adding or Removing Org Security Rules

Removing Displayed Security Rules

To remove Security Rules simultaneously:

26. Click the **Remove All** button

*Security Rules

Add **Remove All**

Actions	Rule Name	Add or Remove
 	Example - PYRL data only	Remove
 	Example - AP data only	Add
 	Example - PO data only	Add
 	Example - AAM Admin data only	Add

27. Confirm deletion of the row by clicking the **Remove** button

Are you sure you want to delete all rows? 

Cancel **Remove**

Adding or Removing Org Security Rules

Removing All Org Security Rules

28. To Remove **all** Org Security Rules from the user's profile, select **Remove All Org Security Rules** from the Action Required dropdown.

Note: This option should be selected if the user will no longer have AP, PO, or AM roles assigned, and therefore, does not need Org Security to be applied.

29. When all rules 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 submit the information for processing

*Action Required

-- None --

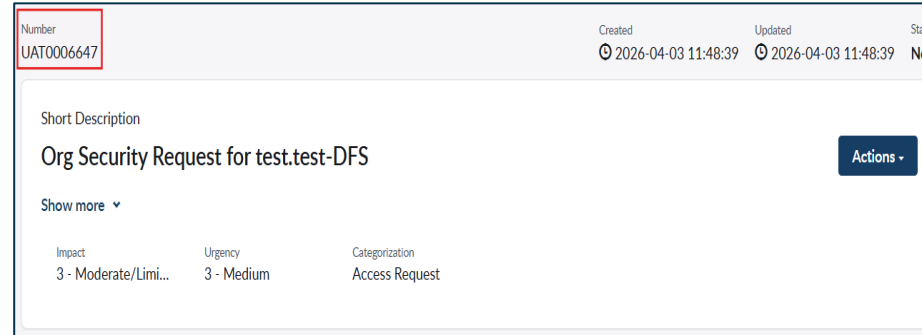
-- None --
Add New User - Agencywide
Add New User - Specific Rules
Modify a User
Remove All Org Security Rules

Submit

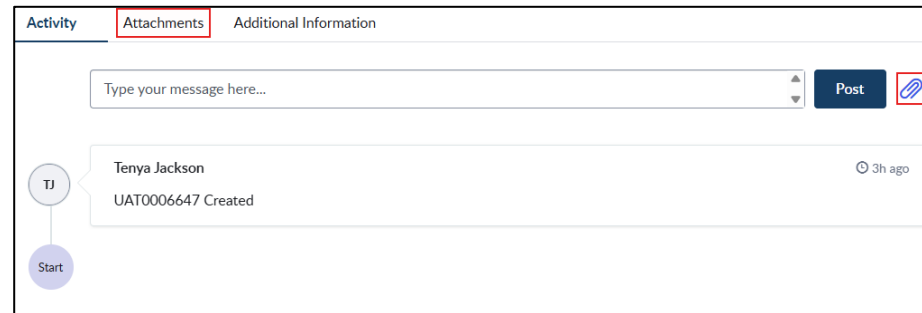
Adding or Removing Org Security Rules

Completed Request Forms

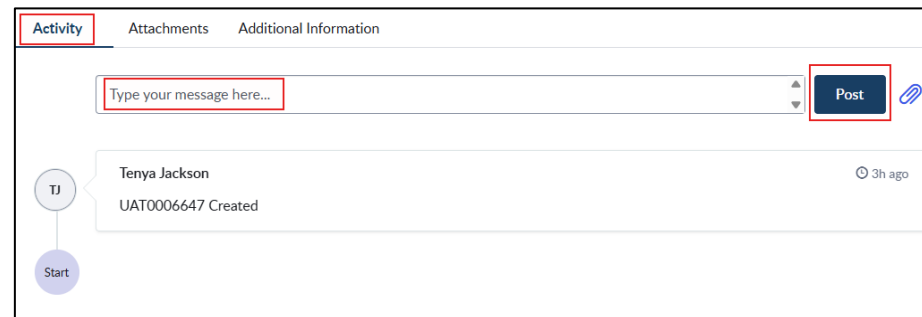
30. A UAT Ticket Number generates at the top of the page.



31. Attachments may be added by clicking the paperclip icon or selecting the Attachments tab



32. 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 Org Security Rules

Completed Request Forms

33. Attachments may be added by clicking the paperclip icon or selecting the Attachments tab

The screenshot shows the Florida PALM interface with three tabs: 'Activity', 'Attachments' (highlighted with a red box), and 'Additional Information'. Below the tabs is a text input field labeled 'Type your message here...' with a vertical scrollbar. To the right of the input field is a dark blue 'Post' button and a red-outlined paperclip icon. Below the input field is a message card for 'Tenya Jackson' with the text 'UAT0006647 Created' and a timestamp '3h ago'. On the left side of the message card is a circular profile icon with the initials 'TJ'. Below the message card is a 'Start' button.

34. 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

The screenshot shows the Florida PALM interface with three tabs: 'Activity' (highlighted with a red box), 'Attachments', and 'Additional Information'. Below the tabs is a text input field labeled 'Type your message here...' with a vertical scrollbar. To the right of the input field is a dark blue 'Post' button (highlighted with a red box) and a blue paperclip icon. Below the input field is a message card for 'Tenya Jackson' with the text 'UAT0006647 Created' and a timestamp '3h ago'. On the left side of the message card is a circular profile icon with the initials 'TJ'. Below the message card is a 'Start' button.

Adding or Removing Org Security Rules

Completed Request Forms

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

Activity

Attachments

Additional Information

Variables

*User ID For:

test.test-DFS

Agency:

*User ID Email:

test@testing.com

User ID Phone Number:

8771234567

*Action Required

Modify a User

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.

Security Rules

Rule Name	Add or Remove
Example - PYRL data only	Remove
Example - AP data only	Add
Example - PO data only	Add
Example - AAM data only	Add

CONTACT US

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