



Florida Department of Financial Services

Workiva

Agency User Account Procedures

June 2023

Workiva Access

Workiva access is controlled by the Workiva Workspace Administrator within the Division of Accounting and Auditing, Bureau of Financial Reporting. To accommodate the recording of leases and subscription-based information technology arrangements (SBITAs) per the Governmental Accounting Standards Board (GASB) 87 and GASB 96, and to complete the Florida Annual Comprehensive Financial Reports (ACFR) closing packages, agencies will now require access in Workiva. The Workiva User ID is the user's agency (work) email address. Two-factor authentication is required when accessing Workiva. The two-factor authentication provides an additional layer of security during the login and authentication process by requiring a password and a six (6)-digit verification code.

A 'Welcome' email will be sent to users when Workiva user access is approved. Upon receipt, the user will create a password and log in using the following the steps below:

1. Open the 'Welcome' email.
2. Enter your username (work email) and create a new password. Password requirements include:
 - a. Minimum password length requirement will default to 16 characters.
 - b. Users will be provided a password strength meter when setting their password.
 - c. Passwords will be verified against password composition rules limiting the type of characters permitted.
 - d. Passwords will be checked against known breached passwords at the time of setting or resetting a password.
 - e. Passwords should not contain the user's first name, last name, or username.
3. Once you've met the password requirements and have chosen a password, click 'Save Changes'.
4. To sign in, a two (2)-factor authentication is required. After creating a password, users can log into Workiva using the user's work email, password, and a six (6)-digit code. This code is sent to the user's email from Workiva and is only valid for ten (10) minutes. To log in using the two (2)-factor authentication:
 - a. Go to the Workiva log-in page.
 - b. Enter your email and password.
 - c. Open your email to retrieve your six (6)-digit verification code.
 - d. Enter the six (6)-digit code on the 'Identity Verification' page.
 - e. Click 'Continue' to be logged into your Workiva account.

In addition, there are three (3) file folders in which agencies can request access to:

1. GASB 87 Lite – Used to complete surveys and obtain output data related to leases.
2. GASB 96 Lite – Used to complete surveys and obtain output data related to SBITAS.
3. ACFR – Used to complete form packages and submit required documents used in preparation for the ACFR.

Agency Access Approver

As a part of data integrity and access control for Workiva, each agency's Finance Director (or equivalent) is the authorized Agency Access Approver. The designated Agency Access Approver will serve as the liaison between the agency and the Department of Financial Services (DFS) regarding access to Workiva. The Agency Access Approver must sign the [Workiva User Account Request Form \(DFS-AI-693\)](#) to provide authorization of the user roles within Workiva. Once completed, the form can be scanned and emailed to the Workiva Workspace Administrator at SFRS@MyFloridaCFO.com.

Agency User Accounts

Agency Access Approvers must request a new user accounts for employees requiring access to Workiva using the [Workiva User Account Request Form \(DFS-AI-693\)](#). They must sign the form, scan the form, and email it to the Workiva Workspace Administrator at SFRS@MyFloridaCFO.com. Deactivating a user account or updating a user's contact information requires the same form and process. Agency Access Approvers enter data on behalf of their agency, which will be available to the public.

Types of Agency User Accounts:

- **Editor** – Can view, edit, and comment on all files/documents in Workiva, limited to the files and folders user access has been provided by the Workiva Workspace Administrator.
- **Viewer** – Can view and comment on all files/documents in Workiva limited to the files and folders user access has been provided by the Workiva Workspace Administrator.
- **Limited Starter** – Can view and comment on certain files/documents in Workiva.
- **Workspace Member** – Can view workspace details and memberships.

Password Resets

If a user forgets his/her password or becomes locked out of Workiva, the Agency Access Approver must contact the Workiva Workspace Administrator at SFRS@MyFloridaCFO.com with the user's name and email to request a password reset. The Workiva Workspace Administrator will reset the password and an email will be sent from Workiva that prompts the creation of a new password.

User Account Lock-Out

To maintain data integrity, the Bureau of Financial Reporting will lock out all user accounts upon final submission of agency information. A week's notice will be sent to the Agency Access Approver via email. During the middle of September, all agencies will be locked out until roll-forward or certain exceptions are approved in advance.

Account Deactivation

When a user leaves an agency, the Agency Access Approver must contact the Workiva Workspace Administrator at SFRS@MyFloridaCFO.com to deactivate the user within two (2) business days of the user's departure from the agency.

Quarterly Verification of User Accounts

Quarterly, the Workiva Workspace Administrator emails the Agency Access Approver a listing of their agency's active users requesting access verification. Upon receipt of the Agency Access Approver email responses, the Workiva Workspace Administrator will take appropriate action.

Revision Control

Name	Action	Date
Ibis Alcala	Original	6//30/2023