

QUICK GUIDE FOR EDITING SPIA USERS

The management of a SPIA Entity's users is performed by the Entity's Administrator using the Entity's **Administrator User ID**. The SPIA Entity assigns the Administrator to the **Administrator User ID**.

This guide shows the screens and steps that an Administrator follows for editing, adding and deleting users.

Editing Users

After logging in to SPIA, the below screen is accessed (**SCREEN #1**). Click the [SPIA Administer Users](#) button.

SCREEN #1

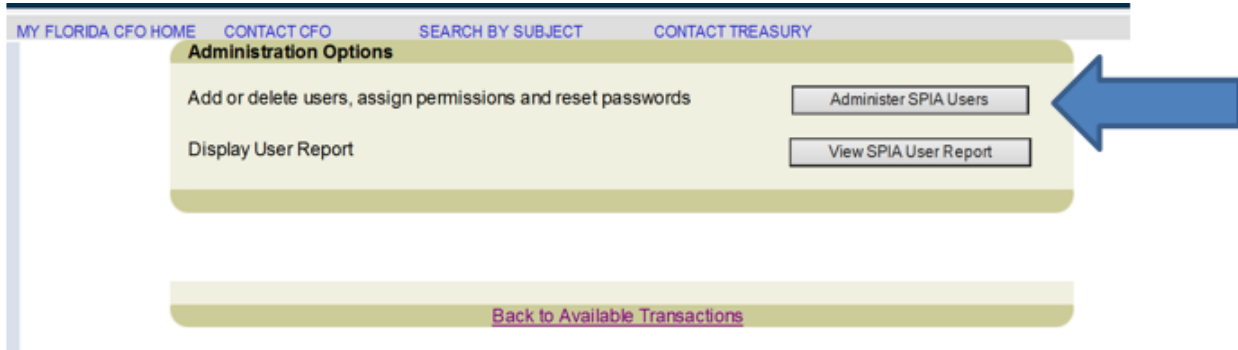
The screenshot displays the SPIA system interface. At the top, there is a navigation bar with links: MY FLORIDA CFO HOME, CONTACT CFO, SEARCH BY SUBJECT, and CONTACT TREASURY. Below this is a section titled 'Available Transactions' with a light green background. It contains a list of transactions and their corresponding buttons:

View Interest Apportionment Monthly Statement	Interest Apportionment Monthly Statement
View Interest Apportionment Ledger	Interest Apportionment Ledger
View entered SPIA Liquidations and Investments	View SPIA Liquidations and Investments
Perform SPIA Liquidations and Investments	SPIA Liquidations and Investments
SPIA Forms	SPIA Forms
SPIA User Administration	SPIA Administer Users

A large blue arrow points to the 'SPIA Administer Users' button. Below the list, there is a note: 'These reports print best with '. At the bottom of the section, there is a footer: 'Set the browser to update temporary Internet files every time you visit the page' and a link: 'Back to Division of Treasury'.

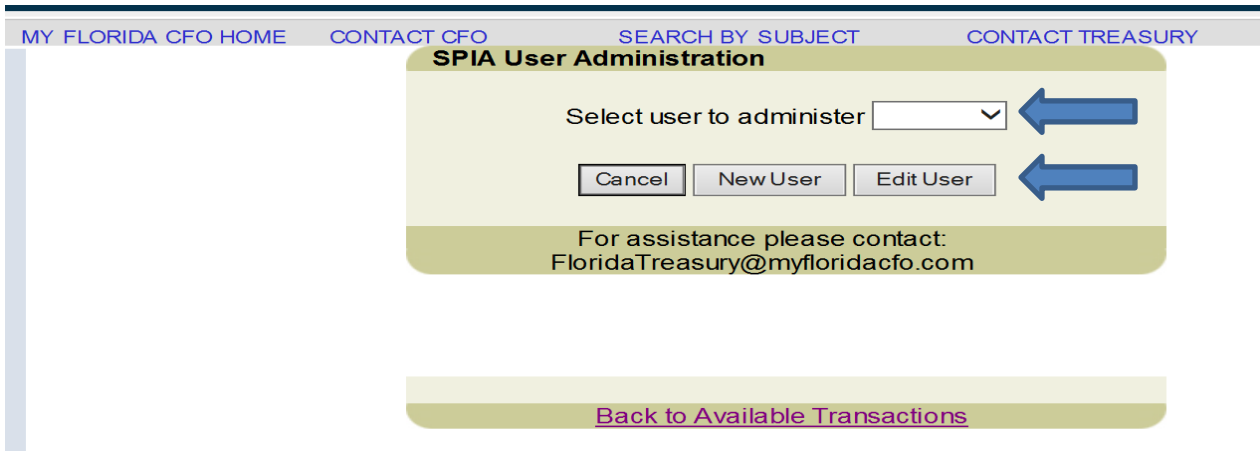
Click the Administer SPIA Users button (**SCREEN #2**).

SCREEN #2



Select the user to edit in the Select user to administer dropdown menu and click the Edit User button (**SCREEN #3**).

SCREEN #3



Each of the Entity's users (including the Administrator) should be edited to include Update Permission Type, First Name, Last Name, phone number and email address (**SCREEN #4**).

Update Permission type options are:

Yes (system default) - The user is able to enter transactions in the SPIA system and will be considered an **authorized user** for this account (Treasury staff will be able to receive verbal instructions from this user) or

No – The user will be able to view account statements but will not be able to enter transactions in the system or provide verbal instructions to Treasury Staff.

After the information has been entered, click the Save button.

SCREEN #4

The screenshot shows a web interface for editing a user. At the top, there is a navigation bar with links: MY FLORIDA CFO HOME, CONTACT CFO, SEARCH BY SUBJECT, and CONTACT TREASURY. Below this, the user's name is displayed as "9999 - TREASURY DUMMY ACCOUNT". The form contains several fields: "Update Permission:" with a dropdown menu set to "Yes"; "User ID:" with the value "tes#56"; "First Name:" and "Last Name:" as empty text boxes; "Email:" and "Phone:" as empty text boxes; "Last login:" as an empty text box; "Last Update:" and "Last Update Id:" as empty text boxes. At the bottom of the form, there are four buttons: "Save", "Cancel", "Reset Password", and "Delete User". Blue arrows point to each of these elements.

Authorized users are established in the SPIA system. Treasury Staff will use this information to determine if an individual has authority to provide verbal instructions and/or obtain information relating to the account. Therefore, it is important that all authorized users are established and maintained in a timely manner.

Add New Users

Follow the steps on **SCREEN #1** and **SCREEN #2**

On **SCREEN #5**, click the New User button (while leaving blank the Select user to administer dropdown menu).

SCREEN #5

MY FLORIDA CFO HOME CONTACT CFO SEARCH BY SUBJECT CONTACT TREASURY

SPIA User Administration

Select user to administer

Cancel New User Edit User

For assistance please contact:
FloridaTreasury@flacfo.com

[Back to Available Transactions](#)

Select the appropriate Update Permission type, create a User ID and enter the user's First Name, Last Name, Email and Phone number (**SCREEN #6**).

After all the required information has been entered, click the Save button (**SCREEN #6**).

SCREEN #6

MY FLORIDA CFO HOME CONTACT CFO SEARCH BY SUBJECT CONTACT TREASURY

9999 - TREASURY DUMMY ACCOUNT
Enter SPIA User Info

Update Permission: Yes

User Id*: First Name*: Last Name*: Email*: Phone*:

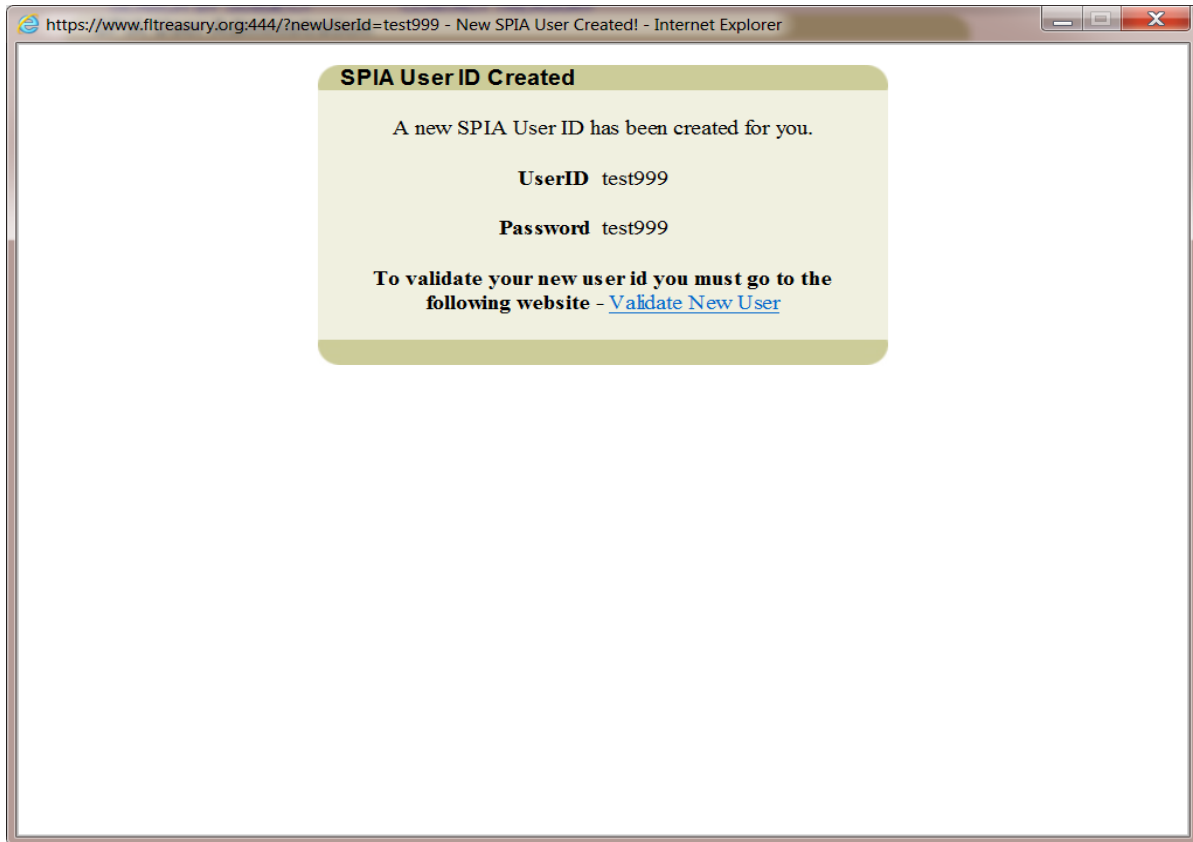
* means required

Save Cancel

[Back to Available Transactions](#)

The system will generate a pop-up message with the new user initial password and a link for new user registration (**SCREEN #7**). Copy this message to an email and send it to the new user for validation and password change.

SCREEN #7



Delete Users/Reset Password

Follow the steps on **SCREEN #1** and **SCREEN #2**.

Select the appropriate user (User ID) on the Select user to administer dropdown menu shown in **SCREEN #8** and then clicks the Edit User button.

SCREEN #8

The screenshot shows the 'SPIA User Administration' interface. At the top, there is a navigation bar with links: 'MY FLORIDA CFO HOME', 'CONTACT CFO', 'SEARCH BY SUBJECT', and 'CONTACT TREASURY'. Below this, the main content area has a title 'SPIA User Administration'. It features a dropdown menu labeled 'Select user to administer' with a downward arrow. Below the dropdown are three buttons: 'Cancel', 'New User', and 'Edit User'. A blue arrow points to the 'Edit User' button. Below the buttons, there is a text block: 'For assistance please contact: FloridaTreasury@myfloridacfo.com'. At the bottom of the main content area, there is a button labeled 'Back to Available Transactions'.

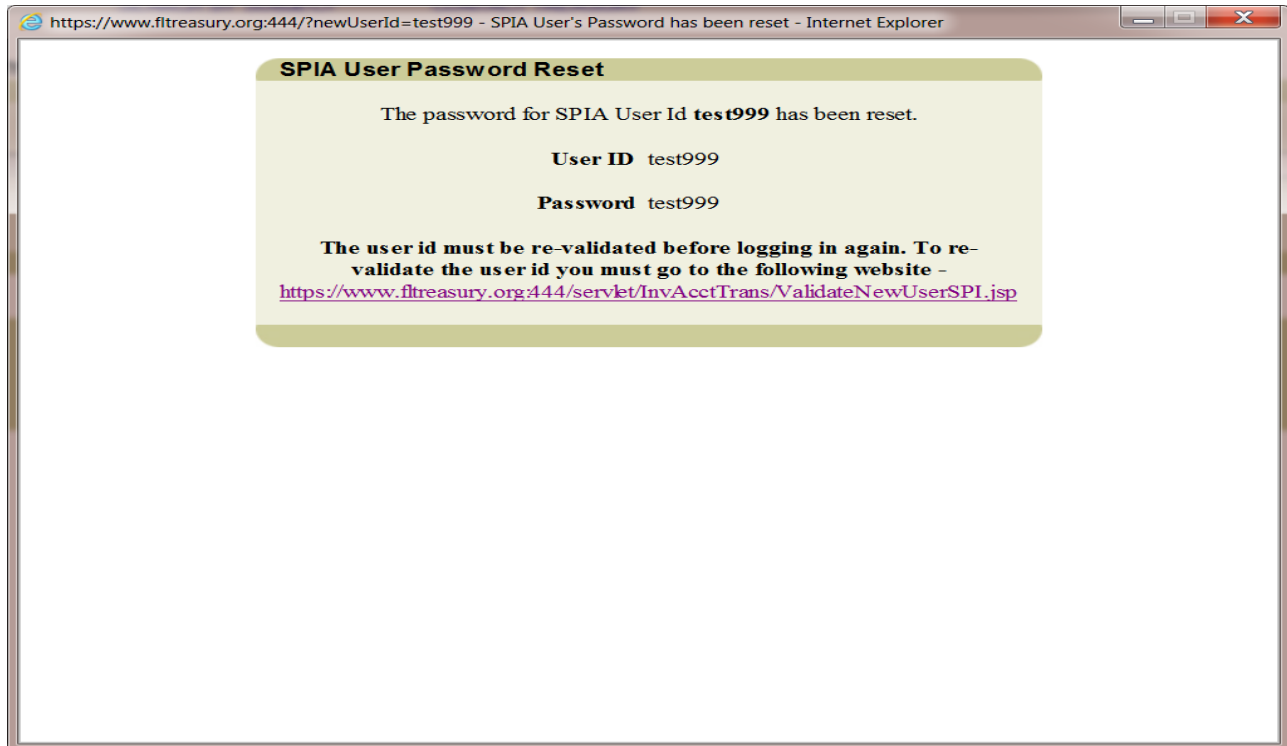
On **SCREEN #9** click the Delete User button to delete the user or Reset Password to reset a user's password.

SCREEN #9

The screenshot shows the '9999 - TREASURY DUMMY ACCOUNT' interface. At the top, there is a navigation bar with links: 'MY FLORIDA CFO HOME', 'CONTACT CFO', 'SEARCH BY SUBJECT', and 'CONTACT TREASURY'. Below this, the main content area has a title '9999 - TREASURY DUMMY ACCOUNT'. It features a form with several fields: 'Update Permission:' with a dropdown menu set to 'Yes', 'User ID:' with the value 'tes456', 'First Name:', 'Last Name:', 'Email:', and 'Phone:'. Below these are 'Last login:', 'Last Update:', and 'Last Update Id:'. At the bottom of the form, there are four buttons: 'Save', 'Cancel', 'ResetPassword', and 'Delete User'. Two blue arrows point to the 'ResetPassword' and 'Delete User' buttons.

When the Reset Password is selected, the system will generate a pop-up message with the default password and a link for user to re-validate the password change (**SCREEN #10**). Copy this message to an email and send it to the user to complete the process.

SCREEN #10



Obtaining User Id reports

Click the View SPIA User Report button on **SCREEN #2** shown above.