



# *Florida Department of Financial Services*

## *Workiva*

### *Agency User Roles Procedures*

June 2023

## Agency Workspace Member

Each agency is able to request Agency Workspace Members within Workiva using the [Workiva User Account Request Form \(DFS-AI-693\)](#). The Agency Workspace Member can view workspace details and memberships. Every employee requiring access to Workiva must have this role. The Agency Access Approver must sign the form to provide authorization of the Agency Workspace Member within Workiva. Once completed, the form must be scanned and emailed to the Workiva Workspace Administrator at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com). These procedures should be followed when a correction, update, or change is made to the Agency Workspace Members.

Depending on each employee's responsibilities, an employee may also be authorized to have any of the additional roles below.

## Agency Editor

Each agency is able to request Agency Editors within Workiva using the [Workiva User Account Request Form \(DFS-AI-693\)](#). The Agency Editor can complete surveys and forms as well as view, edit, and comment on all files/documents access has been granted to within Workiva. The Agency Access Approver must sign the form to provide authorization of the Agency Editor within Workiva. Once completed, the form must be scanned and emailed to the Workiva Workspace Administrator at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com). These procedures should be followed when a correction, update, or change is made to the Agency Editors.

## Agency Viewer

Each agency is able to request Agency Viewers within Workiva using the [Workiva User Account Request Form \(DFS-AI-693\)](#). The Agency Viewer can view and comment on all files/documents access has been granted to within Workiva. The Agency Access Approver must sign the form to provide authorization of the Agency Viewer within Workiva. Once completed, the form must be scanned and emailed to the Workiva Workspace Administrator at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com). These procedures should be followed when a correction, update, or change is made to the Agency Viewers.

## Agency Limited Starter

Each agency is able to request Agency Limited Starters within Workiva using the [Workiva User Account Request Form \(DFS-AI-693\)](#). The Agency Limited Starter can view and comment on certain files/documents in Workiva. The Agency Access Approver must sign the form to provide authorization of the Agency Limited Starter within Workiva. Once completed, the form must be scanned and emailed to the Workiva Workspace Administrator at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com). These procedures should be followed when a correction, update, or change is made to the Agency Limited Starters.

## Revision Control

Name	Action	Date
Ibis Alcala	Original	6/30/2023