Account Setup Instructions - Audit

Update Your "Person" Record

- In order to associate your user ID with the database environment and the records within the database, a ***person record*** must be created. This will also drive what is populated on your landing page through our user-centric reports.
- Navigate to **Data** > **Person**. Find the person's name in the table above and double click to open that record.
    - Update the **Is User** field to your email, and change the full name to your name.

Create a Dummy User & Person Record

- In order to be logged in as a user other than yourself, you must create a dummy user. This will be helpful if you need to submit something for review and approve it or create and fulfill a PBC request to show what that would look like for a customer. To add a dummy user:
    - Select on the person icon in the Workspace you're currently in
    - Select "Add people to organization"
    - Fill in your user's first and last name. For the email, enter in your email + dummy user name@workvia.com (ex: taylor.johns+jimmy.fallon@workiva.com) This set-up will allow you to receive this dummy user's notifications via email.

Account Setup Instructions - Audit

Integrated Risk

Create and Set Up Your Audit Project Reporting

- Create your own ***Audit Report*** and ***Audit Deck*** for your Audit - Copy from the "**Audit Template**" folder from the ***files screen***. Put those copies into a new folder with the title of your audit (you'll have to create this). Once those files have been copied, rename them with your Audit's name (i.e. Accounts Receivable Audit Report) and change the dropdown in the source spreadsheet to update.
- Set up the connected sheet for your data source spreadsheet.
    - Open your ***data source spreadsheet***
    - Verify and update (if needed) that you have access owner permissions on both the entire spreadsheet AND the individual connected sheet sections of the spreadsheet.
    - Establish the connection for each section under the **Data: Connected Sheets** section.
        - Any section that had a connected sheet prior to import will automatically have all cells locked in the section. You will need to unlock all the cells you want to refresh. Be careful not to unlock any cells containing formulas. If you unlock formula cells and create a data connect, those cells will automatically be cleared out.
            - Final Report [Connected Sheet] - Audit Info & Issues - Make sure cells S-T are locked
            - Final Report [Connected Sheet] - Procedure Results
            - Issues Log > Observations (Low) [Connected Sheet] - Make sure cells H-I are locked **(Note: you need to add a column before connecting this as the data goes to column H)**

Account Setup Instructions - Audit

Load Your Support to Your Audit Procedure

- Similar to SOX, you will have to delete these PBCs and test matrix and load your own. Feel free to load the same one from the SOX account based on your control.
- Create and fulfill a population PBC request to select your samples based on the type of audit you have been assigned.
- Review other procedures in your audit and go through the same steps in order to populate different reports and dashboards with activity.
- Leave some comments in different areas of Wdesk (on a procedure, in the audit report, on requests, issues, etc.)
- Review any user-centric reports and dashboards to validate they are populated with your activity, and add any relevant records if they are not populated.
    - Add yourself as a reviewer for different procedures
    - Log time for different procedures
- Ensure your landing pages appropriately populate and reflect what you'd like to demonstrate.
- Create a certification process to leverage during your demonstration. Example templates can be found on the Workiva Marketplace.
    - Assign yourself, along with a dummy user, to the certification and respond.
- Walk through the demo flow and make any updates needed, or if you see any missing/incorrect information that will impact your demonstration.