



Account Setup Instructions – Policy & Procedures (P&P)

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 task or request. 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@workiva.com (ex: taylor.johns+jimmy.fallon@workiva.com). *This set-up will allow you to receive this dummy user's notifications via email.*