City in Iowa Controls Its Budget Reporting **and More with Workiva**

More doesn't always equal better, especially when it comes to the number of software applications used for financial reporting.

The Iowa city of Dubuque once used multiple Excel® spreadsheets and Word® documents, emails, SharePoint®, and the general ledger to manage its financial reporting processes, with no central location to keep its files. Due date reminders and progress updates were handled manually. City Director of Finance and Budget Jenny Larson called it "a very manual, disjointed process."

After a significant error where revenue was added in to the budget twice, leaders knew they needed a new software solution. They turned to peers on local government budget teams to come up with a short list.

"Workiva definitely stood out from the other software vendors," Jenny said. "It honestly just blew our minds when we saw the solution demonstrated, just trying to grasp all the different things that we could do with it outside of even just doing the budget reporting."

Envisioning connected reporting, from budgets to the CAFR

Dubuque started by using Workiva to connect people, data, and processes involved in city budget processes. It brought all budget documents into the Workiva platform to enable connected reporting, automated workflows, and linking of data across spreadsheets and documents. Employees from more than two dozen city departments have access, with document owners controlling who can edit or simply view documents or spreadsheet cells.

"Then we built out our projections, our property tax projections, our state reporting, full-time equivalent reporting," Jenny said. "We started automating our work process workflow and budgeting by using Certifications." Certifications gave the city a way to establish repeatable steps for obtaining signoffs and approvals in an efficient, timely, and transparent process, where employees with the right permissions could see the status of approvals.

The city even used Workiva to automate the fleet vehicle inspection and replacement process, connecting the budget department, city departments with vehicles, and the fleet maintenance supervisor. With everyone in the same platform, there was an established, transparent process for inspections, requests for replacement vehicles, and notifications to the budget department.

"Workiva is an excellent product that will solve problems that you don't even realize that you have," Jenny said.

Next, the city moved its comprehensive annual financial report (CAFR) into the Workiva platform. It also started implementing Wdata, which helps teams automatically connect data from multiple source systems to be enriched and prepared for reporting in Wdesk.

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—JENNY **LARSON,** *Director of Finance and Budget, City of Dubuque*

Organization

City of Dubuque, Iowa

Disconnected challenges

After a significant error was created by entering the same revenue twice into the city budget, the government team wanted to replace its manual, disjointed reporting process.

Connected solution

Workiva for Government

Connected results

- Slashed the number of different applications used in the budget process from five to two
- Reduced the risk of manual errors
- Created process reliability with automated reminders and workflow
- Increased engagement across 28 departments and the community
- Freed up more time for the city manager to weigh decisions while balancing the budget

Why the company chose Workiva

- Centralized platform for creating budgets and financial reports
- Ability to connect multiple data sources to multiple reports

It's exciting to use. As you implement one thing, you think of all the other processes you can improve. And then, of course, Workiva keeps expanding the capabilities.

—JENNY **LARSON,** *Director of Finance and Budget, City of Dubuque*

"We're pretty excited about where we can go in the future once we have Wdata implemented," Jenny said.

As a leader in transforming processes, the city was a featured presenter at Workiva Amplify, the annual user conference where customers share ideas and talk to developers about what's coming next to the platform.

"It's exciting to use," Jenny said of the platform. "As you implement one thing, you think of all the other processes you can improve. And then, of course, Workiva keeps expanding the capabilities."

"Every year, there's something different that we're able to do and implement in our processes, so it's definitely a tool that doesn't stay stagnant," Jenny said. "It grows with the users."

See what Workiva can do for you. Go to **workiva.com/request-demo**

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