uRISQ®
powered by CSR

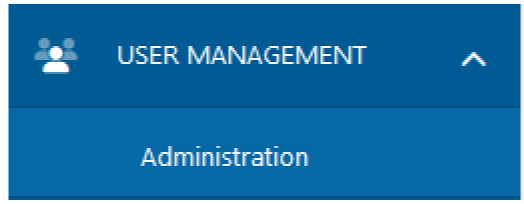
USER MANUAL

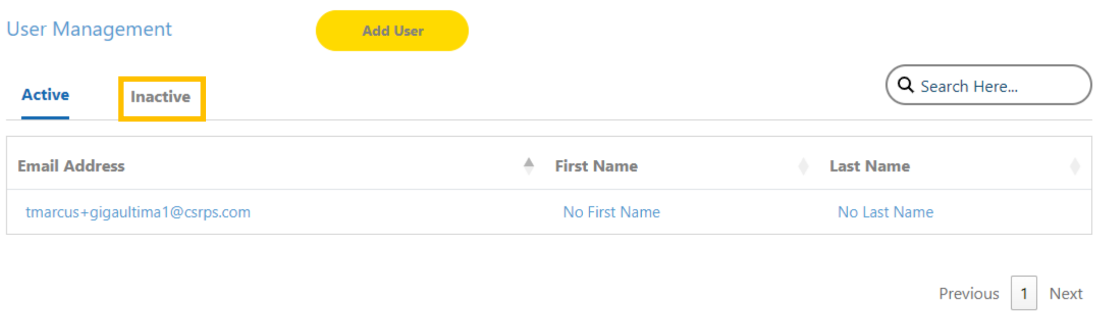
USER MANAGEMENT

User Management

uRISQ provides an intuitive interface for companies to add, edit, activate, and deactivate user accounts. To add or manage users:

1. Click on User Management in the left-hand navigation
2. A list of active users will be displayed
    a. To view and edit inactive accounts, click on the "Inactive" tab at the top of the listing table.





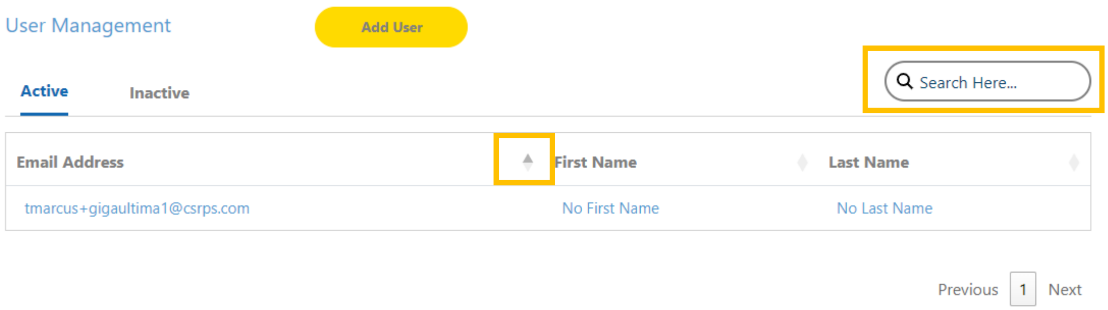
How to Find a User

There are two ways to find an existing user account or filter your user lists.

1. Searching
2. Sorting

A search field is available to search for the user by name or email. Start typing and the results will filter in real time based on the search value you enter. The search result applies to the respective "active" or "inactive" views.

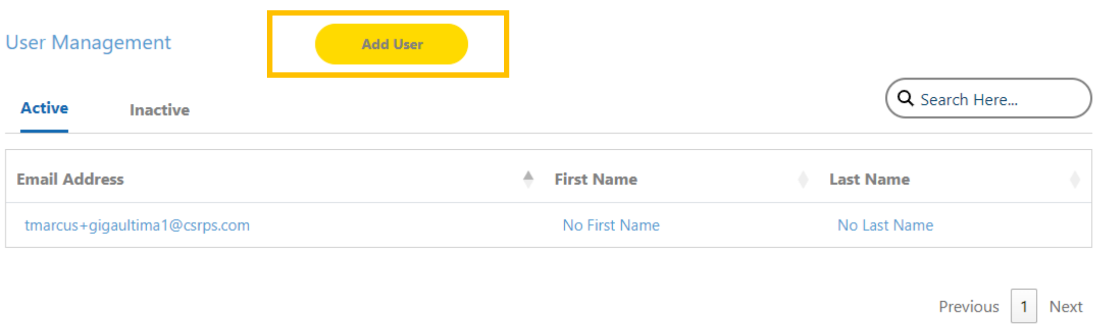
In addition, each list may be sorted by clicking the column headers. The list has a default sort based on email address.

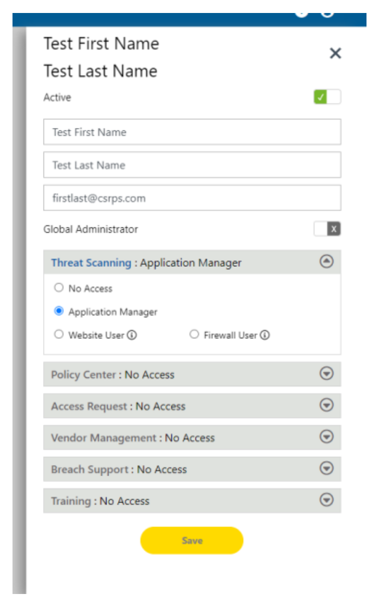


Adding a User

To Add a new user:

1. Click on User Management in the left-side navigation
2. Click on the 'Add User' button.





3. A panel will slide open from the right, allowing the user to input all the new users' data.
4. Enter the first and last name of the user. As you enter in these values, the name will appear at the top of the panel.
5. Next, add the user's email address. Email addresses must be formatted correctly and must be unique.
6. Assigning Access
    a. If you wish the user to have access to all modules at the highest levels and be able to manage the account users, click the **Global Administrator** toggle to the green checkmark.
    b. Each module has its own security levels (described in section 9.2.1 of this document), so if you wish to assign specific module access to a user, click on the respective module and assign the user level you desire.
7. Click Save

uRISQ will send out a notification to all the Global Administrators notifying them of a new user added to the account. Additionally, uRISQ will send the new user an invitation email with a registration link to complete their account setup. *An important note, the link in the invitation email for registration is only valid for 24 hours. You may resend the invitation as needed from the edit user panel.*

User Module Access Types

Access to each module may be defined by the Global Administrator for each user. This provides companies with a means to tailor each user's experience as company requirements dictate.

1. **Threat Scanning**
    a. **Application Manager** has full access to reports and settings for the Threat Scanning module which includes both website and firewall scan reports. The Application Manager will also receive email notifications when scans are completed, if their communications settings have Application Notifications selected.
    b. **Website User** will only have access to website scan reports. Website Users will receive email notifications when website scans are complete, if their communications settings have Application Notifications selected. This assignment is ideal for your website developer.
    c. **Firewall User** will only have access to firewall scan reports. Firewall Users will receive email notifications when the firewall scans are complete, if their communications settings have Application Notifications selected. This assignment is ideal for your network administrator or managed service provider.

2. **Policy Center**
    a. **Application Manager** has full access to the Policy Center module. This user can download and generate tasks, complete tasks, and add notes to the activity log. The Application Manager will receive annual notifications for policies and plans that are due for review, if their communication settings have Application Notifications selected. This assignment is ideal for the person who is responsible for your corporate policies.
    b. **Standard User** has access to download, complete tasks, and add notes to the activity log. This assignment is ideal for those who are responsible for modifying and reviewing corporate policies.

3. **Access Request**
    a. **Application Manager** has full access to the Access Request module. This user level has access to the Access Request module Settings to configure and change the request form and make modifications to the modules advanced settings. In addition, the Application Manager will receive access request submission notifications and timeline notification emails, if their communication settings have Application Notifications selected. The Application Manager can assign tasks to other users within their organization. The ideal person for this assignment is the person responsible for the management and completion of access requests.
    b. **Standard User** has access to the requests they have been assigned and are able to complete assigned tasks and add notes. The Standard User will receive timeline notification emails, if their communication settings have Application Notifications selected. The ideal person for this assignment is users that will be assigned tasks for the fulfillment of access requests, i.e.: IT staff that may need to query data or HR staff that may need to look in files.

4. **Vendor Management**
    a. **Application Manager** has full access to the Vendor Management module. This user can add and modify Vendors; create assessments, assign assessments, review answers on submissions, and verify the overall vendor assessment. The Application Manager will receive notification emails, along with the Department Owner, when a vendor is due for a contract review, audit review, or annual assessment, if their communication setting has Application Notifications selected. The ideal people for this assignment are users that are overall responsible for organizational vendor relationships (not the department owner). This person would be verifying and accepting the potential risk of the respective vendor.
    b. **Standard User** has access to adding and modifying vendors; assigning assessments; and reviewing answers on submissions. The ideal person for this assigned is a user that is responsible for one or more vendors (like a department manager) who will need to review the answers to the submitted assessment and/or will be completing the assessment on behalf of the vendor.

5. **Breach Support**
    a. **Standard User** can submit a breach support request. The user will have access to the form and will be able to complete and submit the form for assignment to a Certified Privacy Professional.

6. **Training**
    a. **Application Manager** has full access to the Training module. This user can share and view reporting statics of each training video. The Application Manager will receive monthly training compliance emails informing them of who has and has not completed the training videos and notifications to watch videos ensuring these topics remain top of mind if their communication settings have Application Notifications selected. The ideal person for this assignment is the person with responsibility for managing employee training, like a team member in Human Resources.
    b. **Standard Users only** have access to view the training videos. The Standard User will receive training video notification to watch published videos ensuring these topics remain top of mind if their communication settings have Application Notification selected. The ideal person for this assignment is a company employee. If you assign a user the Standard User assignment in Training, they will automatically be sent a video training request one after the other, ensuring they are presented with each video.

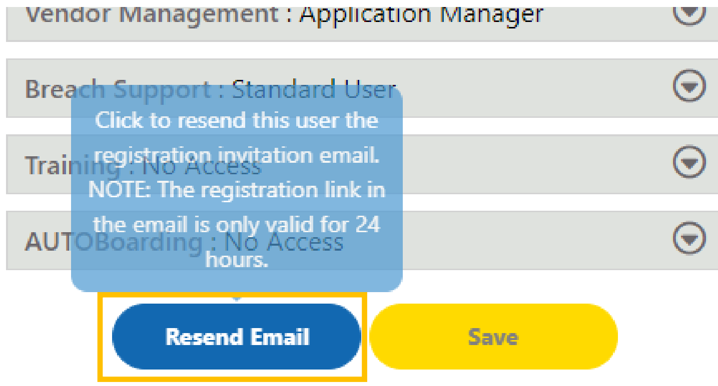
7. **AUTOBoarding**
    a. **Application Manager** has full access to send out campaigns to customers and view reports. They will also receive all system notifications from this module if their communication settings have Application Notifications selected.
    b. **Standard Users** only have access to the reporting section. They are not able to send out campaigns.

How to Resend User Invitations

If the registration link expires, you can resend the invitation email to the user by selecting the user on the User Management page.

1. Click on User Management in the left-side navigation
2. Select the user
3. Click the 'Resend Email' button

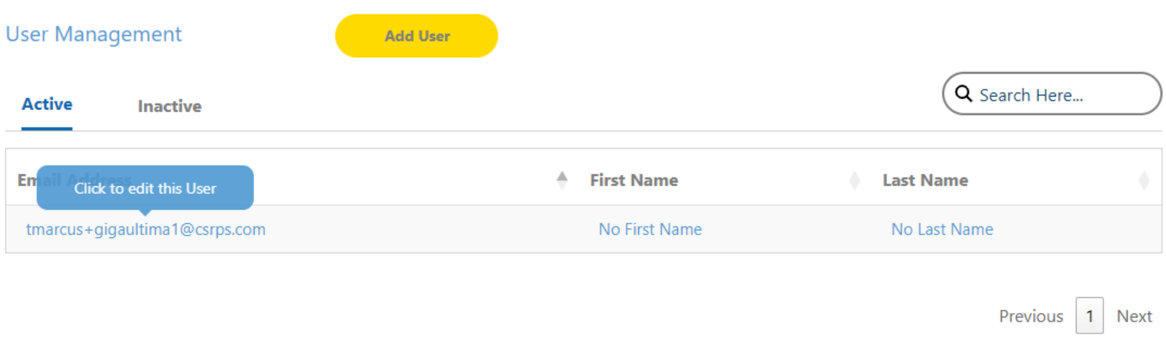
uRISQ will generate a new, valid registration link and send it via email immediately. Once a user completes the registration, the 'Resend Email' button will no longer be available.

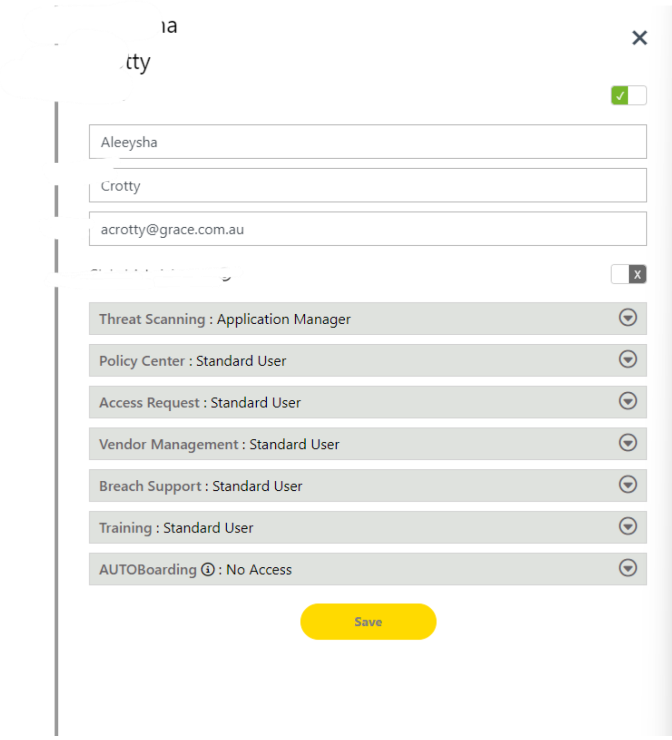


Editing a User

To edit a user:

1. Click on User Management in the left-side navigation
2. Select the user you wish to edit.
3. The edit panel will open to the right with the user's information
4. Make desired changes
5. Click Save





Global Administrators

A few important things to note; a company must always keep at least one Global Administrator to manage all aspects of their company uRISQ account. The system will notify the user if there is an issue editing a user's access levels. Additionally, only Global Administrators have access to the User Management module.