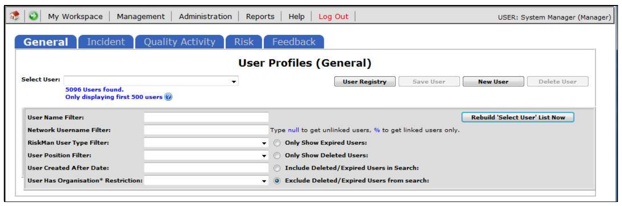
Introduction

This reference guide is aimed at managers who will be responsible for managing users within RiskMan where RiskMan is configured to use network logins. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from the *Help -> References Guides* page

How do I access the User Profiles to create, modify or delete a user?

To create a new user you will need to navigate to the *Administration -> User Permissions -> User Profiles* page



The User Profiles page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risk, Quality Activity; with an additional non-register specific tab called **General**. Depending on your permissions you may see all tabs or just some of these tabs

The **General** User Profile is used to assign User permissions and Restriction Details that are common across all Registers as well as the Administrative Permissions

The information under each of the tabs allows you to, create or modify a user and also to activate/de-activate a user for a particular register. Users that no longer work for your organisation are deleted under the **General** tab only. Below are the definitions of the sections that are included under the Register tabs:

- **Filter fields** - Used to search for an active, deleted or expired user or users who have no permission under the specific Register User Profile e.g. Risk
- **Login Details** - Used to enter the details of a new user or modify the details of an existing user
- **Current/Pending Delegation** - Used to create a delegation on behalf of another user (this section will only display if the user has the appropriate permission)
- **Restriction Details** - Used to restrict users' entry/ update or reporting of notifications/items/activities based on common fields throughout RiskMan e.g. Site/Region & Campus/Location restrictions
- **Specific Restrictions** (**<u>not available</u>** under the **General** and **Feedback** tabs) - Used to restrict users' entry/update or reporting of notifications/items/activities for a specific Register
- **Field Settings** (**<u>not available</u>** under the **General** tab) - Specify the status of a field e.g. Hide, Entry Required, Read Only, Optional Entry on a specific Register. Field Settings are usually dictated by the user's assigned template
- **User Permissions** - Specify a user's permissions that are either common across all registers e.g. administrative permissions (this is done under the **General** tab) or specific to a Register. User Permissions are usually dictated by the user's assigned template

Clients who have a User Licence

If your organisation has a User Licence rather than a Site Licence you will be limited to the number of users that you can create in RiskMan.

If the number of users is close to the maximum or you have reached the maximum, the following message will appear at the top of your User profiles page.

If you have reached the maximum number of users you will be able to delete and modify existing user but **<u>will not</u>** be able to create a new user. You will have the option to purchase more licences by contacting RiskMan International Pty Ltd, or delete users that are currently not using RiskMan

How do I create a New User?

Users can be setup under any of the tabbed sections of the User Profile. However, when you do create a user, depending on your RiskMan setup, a user may only be activated for specific Registers e.g. Incident & Feedback, but not activated under the Risk or Quality Activity Registers. All users will be activated under the **General** tab

In this guide, it will be assumed

- A user is always activated under the Incident & Feedback Registers but not under the Risk & Quality Activity Registers
- The person creating, modifying or deleting a user has access to all the Register and General User Profiles

Creating a User

If you do not have permission to all the Register & General User Profiles, a user can be created under one of the Register tabs or the General tab

Where a user is automatically activated e.g. under the Incident, Feedback & General tabs, they will be assigned the **"Default"** template. This will give the user the minimum access to RiskMan

If you wish the user to be assigned a different template then you will need to move between the Registers & General tab to assign the appropriate template.

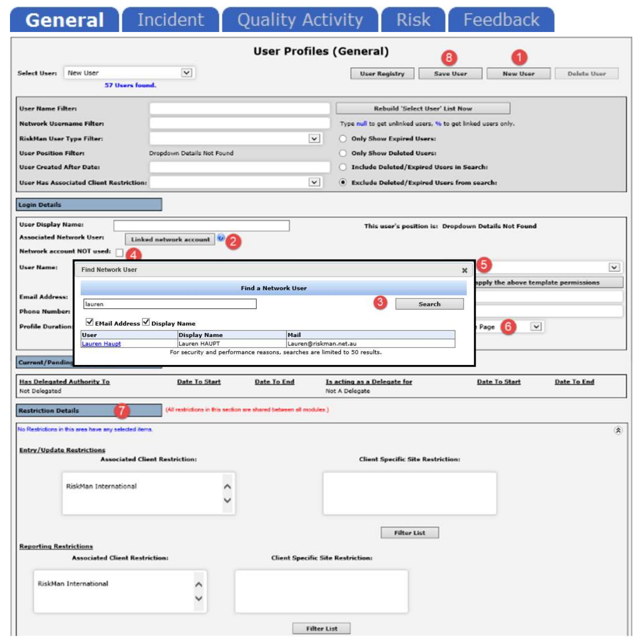
If your role is to provide Administrative support to RiskMan then we suggest that you have permission to all the Register and General User Profiles

General tab

The General User Profiles only contain the

- User permissions that are common across all Registers
- The Restriction Details that are common across all Registers
- The Administrative Permissions

1. Under the **General tab** press the **New User** ❶ button



2. **Creating a network user**
   - In the Login Details section, click on the **Link network account** ❷ button and search for the user

   Note: *The way you search for users will be dependent on how your IT has configured LDAP. In this example we are using a wildcard* ***"*"*** *so that we can find all users whose name starts with "anne"*

   - Type the users name into the search field and click search ❸
   - Click the users name in the list displayed
   - The user's details e.g. **Username, Display Name (in most cases)** and **Email Address** will be auto-populated into the respective fields. The user's password won't be visible
3. **Creating a non-network user**
   - Check the **Network account NOT used** ❹ field
   - Enter the user's **Display Name**, **User Name** (logon), **Password** and **Email Address** (it is advisable that all managers have an email address registered with their User Profile so they can receive emails from RiskMan). Note that you will

need to meet password complexity requirements, if your system is configured to mandate this.

4. **For both network and non-network logons**
   - **This user's RiskMan User Type is ❺:** Select the template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

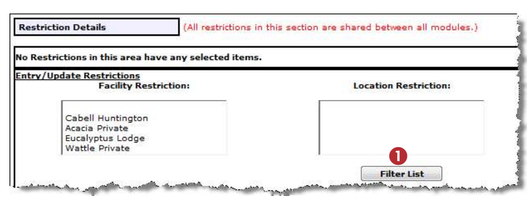
     Note: *All restrictions under the Restriction Details section will either need to be manually selected for that user, or will need to be applied through the* ***"Apply Template Changes"*** *option which will affect all users on that template - refer to the* ***RiskMan User Templates Guide***

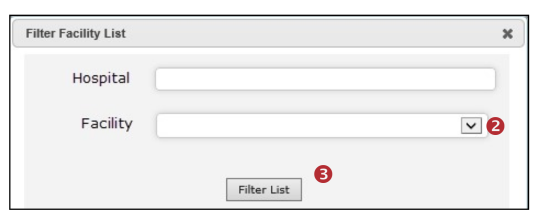
   - **Start Page ❻:** A default start page *(the page the user will be presented with when they first logon to RiskMan)* may display depending on the assigned template. This can be changed if required

5. If required, select the user's overall **Restriction Details** ❼ i.e. the restrictions that are **common** across all Registers. Once selected, they will be applied across all Registers
   - **Entry/Update Restrictions:** If the user can only enter or update Register specific notifications/ items/activities based on Sites and/or Locations, select accordingly. To select more than one item in a list hold your **CTRL** button and click on the list items

     To view the Location restrictions

     - Click on the **Filter List** button ❶ under the Location Restriction box
     - In the pop-up window, select the Site ❷ and press the **Filter list** ❸ button
     - The list of Locations will populate into the **Restriction Details** ❹ section
     - Highlight as required *(Hold CTRL key if you wish to select more than one Location)*





- **Reporting Restrictions:** If the user has access to running Register specific Reports, you can restrict their access to what they can view in the report based on any of the displayed fields.

  To view the **Location** restrictions follow the steps described above under the **Entry/Update restrictions**

  Note: *Additional* ***Entry/Update*** *and* ***Reporting Restrictions*** *can be added under the* ***Specific Restrictions*** *section under each of the Register User Profiles. The Specific Restrictions section is not available under the* ***General*** *tab*

6. To save the user, press **Save User** ❽

Assign a Register Specific Template for the New User

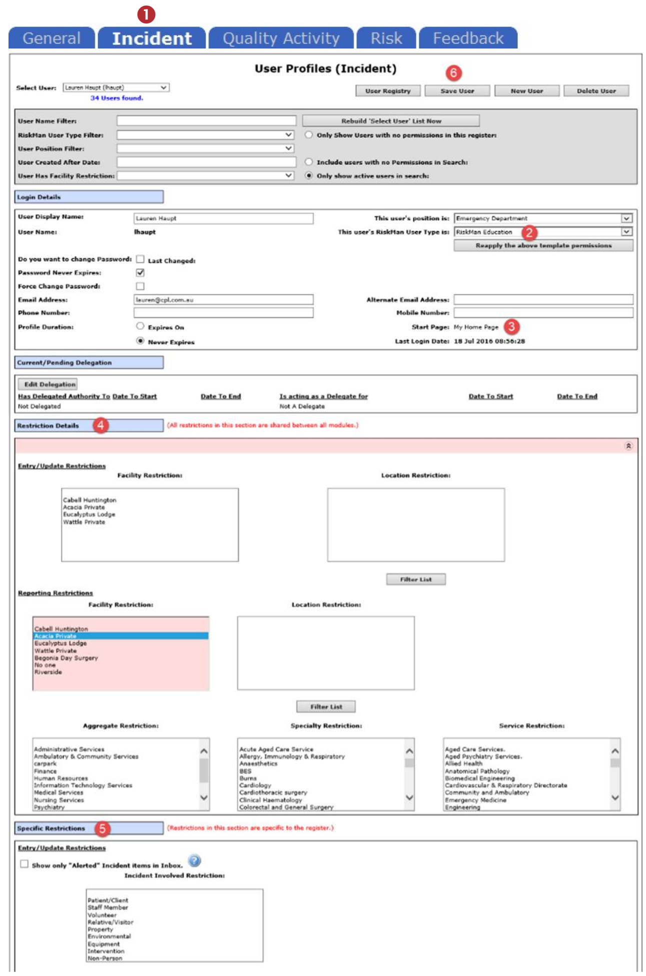
Once the user has been created under the **General** tab, you will need to move between each of the other Registers to ensure the user has the correct permissions to the other Registers, where applicable.

The following pages describe setting up the new user under all the Registers that the user will have permission to access.

Note: *Because RiskMan is configured according to the requirements of each client, the following scenario may not directly apply to you. It is likely that you will have fewer or more Registers than what is depicted in this User Guide.*

Incident tab

1. Click on the **Incident tab** ❶ and the newly created user will be displayed (we have assumed the user is automatically active under this Register)



2. Assign the appropriate **Incident Template** in the **Login Details section**

   - **This user's RiskMan User Type is ❷:** Select the Incident template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

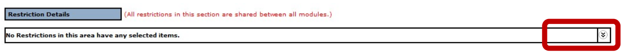
   - **Reset fields to this type ❷:** Select the same Incident template the user will be assigned to. The Incident fields, User permissions, Field Settings and any "Restrict to these Reports" and/or "Restrict to these Journal Types" restrictions for that template will be updated

     Note: *All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the* ***"Apply Template Changes"*** *option which will affect all users on that template - refer to the* ***RiskMan User Templates Guide***

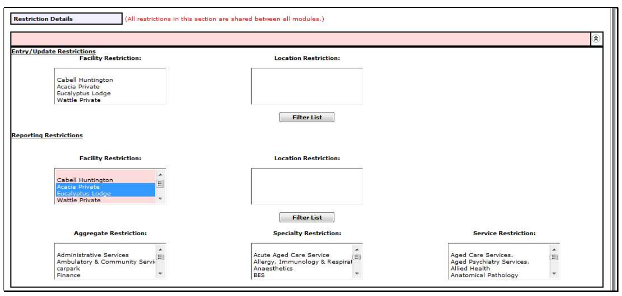
- **Start Page ❸:** If this was selected under the General tab it will also display here. If not, you can select a start page from this list.

3. **Restriction Details ❹**: If the user does not have any Restriction Details then this section will be collapsed.

   - To expose the **Restriction Details** section click on the icon.



   - If the user has restrictions this section will be exposed. If you make any changes to these restrictions they will affect all Registers the user is active under (as these are the common restrictions)



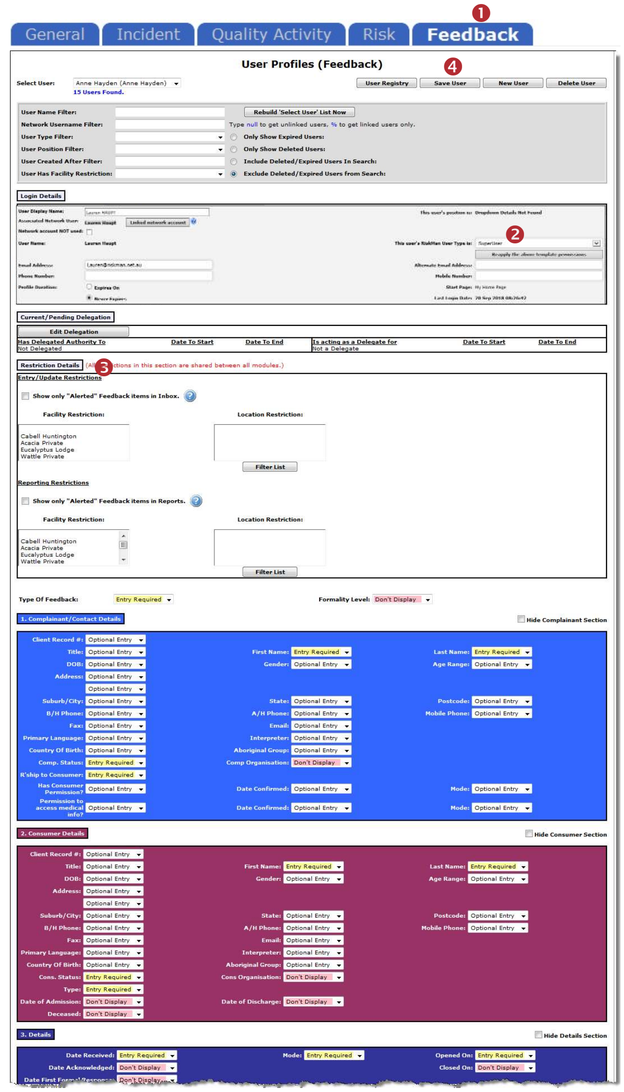
4. **Specific Restrictions ❺**: This section will display the Register specific restrictions

   - Highlight the **Entry/Update**, **Reporting** and/or **Journal Type Restrictions** as required
   - **Show Only "Alerted" Incidents in Inbox:** This option should **only** be checked if the user has access to the Incident Inbox (e.g. Risk/Quality Managers) and should only see incidents they have been alerted to
   - **Show Only "Alerted" Incidents in Reports:** This option should only be checked if the user has access to the Incident Reports (e.g. Risk/Quality Managers, Executives, Line Managers) and can only report on incidents they have been alerted to
   - If you restrict the list of reports the user **WILL NOT** have access to the Incident Custom Report Builder on the Incident Reports page to create, modify or delete Custom Report Layouts

5. To save the user, press **Save User** ❻

Feedback Tab

1. Click on the **Feedback tab** ❶ and the newly created user will be displayed



2. Assign the appropriate **Feedback Template** in the **Login Details section** ❷ (refer to the description under the **Incident Tab**)

3. **Restriction Details** ❸**:** In this version, there is no Specific Restrictions section. The Site & Location Entry/Update or Reporting restrictions will be carried across from all other Registers. In addition, on the Feedback User Profile, the following restrictions can be included

   - **Show Only "Alerted" Feedback in Inbox:** This option should only be checked if the user has access to the Feedback Inbox (e.g. Risk/Quality Manager, Consumer Advocate) and should only see feedback they have been alerted to

   - **Show Only "Alerted" Feedback in Reports:** This option should only be checked if the user has access to the Feedback Reports (e.g. Consumer Advocate, Risk/Quality Manager, Executives, Managers) and can only report on feedback they have been alerted to

4. To save the user, press **Save User** ❹

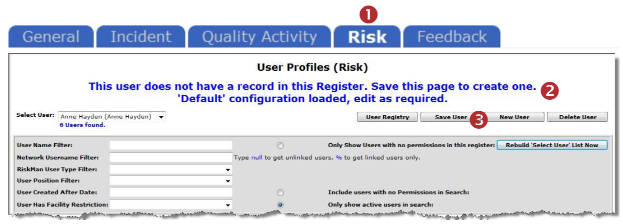
Risk Tab

In our scenario, users are **not** automatically activated under the Risk Tab.

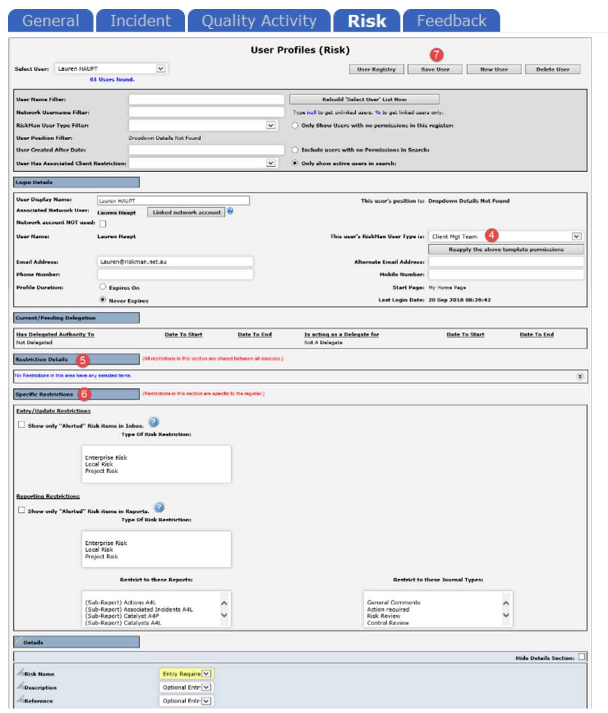
1. Click on the **Risk tab** ❶

2. A message will display at the top of the page specifying that the user you have created does not have a record in the Risk Register User profile i.e. they are not activated under this Register ❷

3. If you would like this user to be an active Risk Register user, press the **Save User** ❸ button



4. Assign the appropriate **Risk Template** in the **Login Details section** ❹ (refer to the description under the **Incident Tab**)



5. **Restriction Details ❺:** If the user does not have any Restriction Details then this section will be collapsed
   - To expose the **Restriction Details** section click on the icon.
   - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
6. **Specific Restrictions ❻**: This section will display the Register specific restrictions
   - Highlight the **Entry/Update**, **Reporting** and/or **Journal Type Restrictions** as required
   - **Show Only "Alerted" Risk Items in Inbox:** This option should **<u>only</u>** be checked if the user has the following **Management Permission: Can Review Entries in Inbox** (e.g. Risk/Quality Managers, Executives) and should only see Risks they have been alerted to
   - **Show Only "Alerted" Risk Items in Reports:** This option should only be checked if the user has access to the Risk Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on risks they have been alerted to
   - If you restrict the list of reports, the user **<u>WILL NOT</u>** have access to the Risk Register Custom Report Builder on the Risk Reports page to create, modify or delete Custom Report Layouts
7. To save the user, press **Save User** ❼

<u>How do I modify an existing user?</u>

To modify an existing user, ensure you are on the *Administration -> User Permissions -> User Profiles* page

Modifications that can be done under any of the Register tabs where the user is active

- Modifying the user's **Login Details** for a **Network Account:** The Display Name, Username, Email Address and Password will be controlled by your Network Logins, however all other parts of the Login Details can be modified if required
- Modifying the user's **Login Details** for a **Non-Network Account:** All the details under the Login Details section can be modified **<u>except</u>** for the Username. If you wish to modify the Username you will need to delete the User Profile and create a new one
- Creating or modifying a **delegation for a user**: This can be done under any Register tab where the user is active, provided you have the **Administrative User Permission: Can modify other users Delegates** under the **General** tab
- Modifying the Entry/Update and Reporting Restrictions under the **Restriction Details** section, as these are common across all Registers

Modifications that need to be done under the specific Register tab

- Changing the user's assigned template in the **Login Details** section
- **Activating a user** under a specific Register e.g. Risk or Quality Activity Registers
- Modifying the Entry/Update and Reporting Restrictions under the **Specific Restrictions** section as these are specific to a Register

It is **<u>strongly recommended</u>** that User Permissions and Field Settings are **<u>not</u>** modified under a specific User Profile, if the user is assigned to one of your main Templates e.g. Default, Manager, Executive, Risk Manager. This is because if any of these templates are modified and an "Apply Template Change" is done across RiskMan, the user's field settings and user permissions will be overwritten.

If the user is assigned a template where the users on this template have special needs that are dictated by their User Profile, then you can modify the user's individual field settings and user permissions. Ensure the template that these users are assigned to is **<u>never modified</u>**

Searching for a User

Under any of the Register or General tabs, locate the user

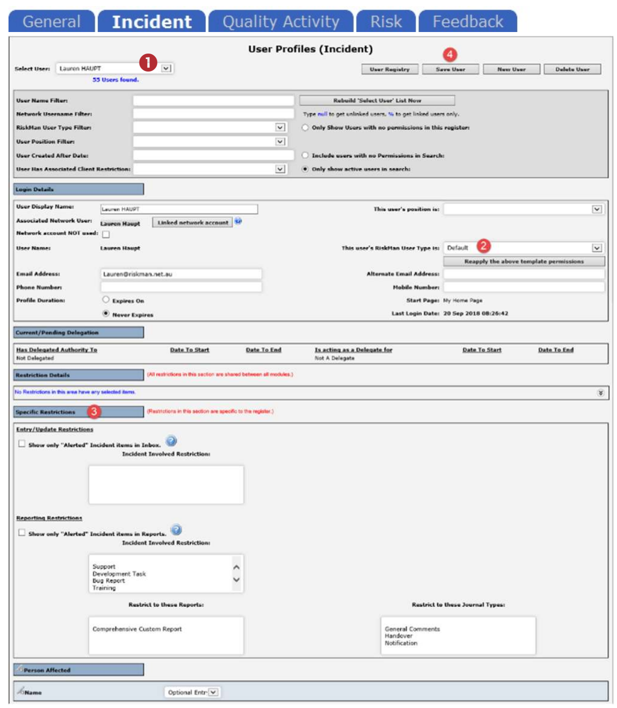
1. Select the user from the **Select User** ❶ list or
2. Enter filter criteria in **one** of the filter fields ❷
   - Press **"Rebuild 'Select User' List Now"** ❸
   - Select the user from the **Select User** ❶ list

Modifications: Template Changes & Specific Restrictions

1. Click on the specific **Register** tab ❶ and locate the user
2. Modify the **Template** changes in the **Login Details** ❷ as required
   - **This user's RiskMan User Type is:** Select the template the user will be assigned to for the selected particular Register. This is used as a reference when templates are updated and changes are applied to all users on that template

   Note: *All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide***

3. Modify the **Specific Restrictions** ❸ as required
4. Press **Save User** ❹

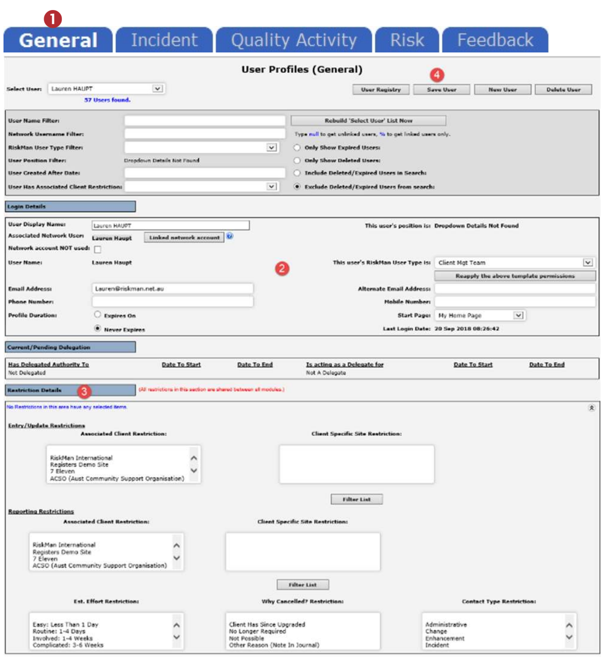


Example: *Modifying a User under the Incident Register User Profile*

Modifications: Login Details & Restriction Details

1. Click on the specific **Register** tab ❶ and locate the user
2. Modify the **Login Details** ❷ as required
    - If the user is a network user their username, password, email and in most cases display name will be controlled by your IT Dept and therefore cannot be modified in the User Profiles.
    - If the user is a non-network user, only the username cannot be changed. This cannot be changed because the username can be linked to Register Items
    - Template changes should be done under the respective Register or General tab - refer to the section **"Modifications: Template Changes & Specific Restrictions"**

      *Note: Advise that you **do not** modify the field settings or the user permissions as these are controlled by the User Templates and could potentially be overwritten if the templates are modified*
3. Modify the **Restrictions Details** ❸ as required
4. Press **Save User**



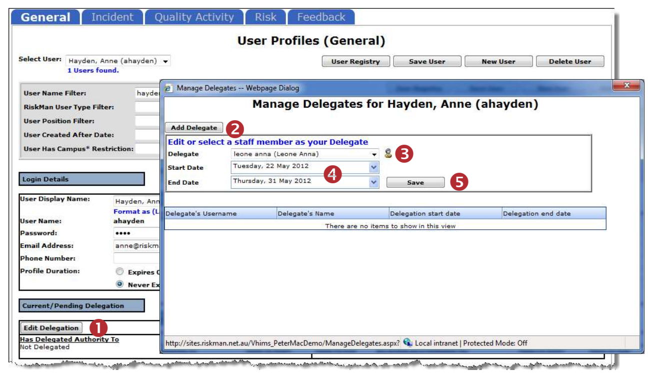
Modifications: Adding or Modifying a Delegate for a User

If a Manager is on annual leave or not available to perform their RiskMan duties for a period of time you can

- Check to see if the Manager has already assigned a delegate and if not assign a delegate on their behalf; or
- Modify a manager's delegation if the selected delegate becomes unavailable e.g. on sick leave

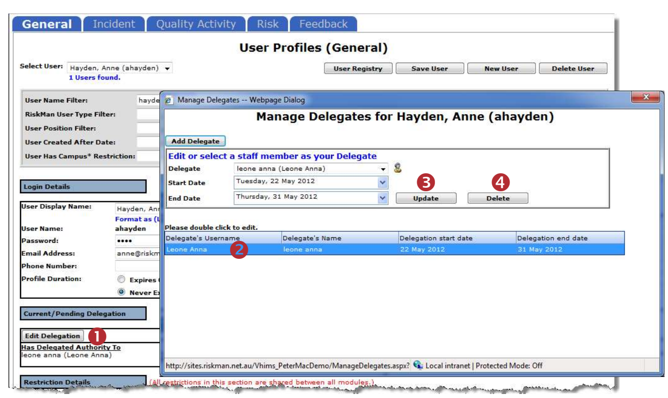
To assign a delegate

1. Locate the user under any Register or the General tab
2. Press the **Edit Delegation** ❶ button
3. Press the **Add Delegate** ❷ button
4. Search for the delegate using the **Filter icon** and then select the user from the **Delegate** list ❸
5. Enter the delegation period ❹ (**End Date** should be the date the user is returning)
6. Press **Save** ❺



To modify/delete an existing delegate

1. Locate the User under any Register or the General tab
2. Press the **Edit Delegation** ❶ button
3. Double click the **Delegate's Name** ❷ in the list
4. If you wish to modify the details of the delegate, make any respective changes and press **Update** ❸
5. If you wish to delete the delegation press **Delete** ❹



Modifications: Activate a User under a Register

Users can be active under some Registers e.g. Incidents & Feedback but not necessarily active in other Registers e.g. Risk & Quality Activity. This will depend on how your system is setup.

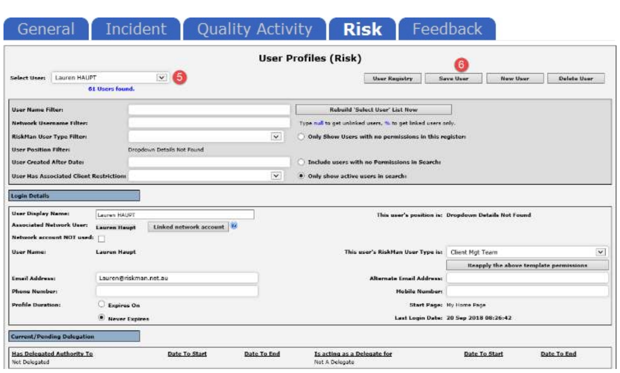
All users will be **active** under the **General & Feedback** tabs

If a user is not active under a Register, then they can be activated as follows:

1. Click on the specific **Register tab** ❶ e.g. Risk

2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
   - Enter the user's first or last name in the **User Name Filter** ❷ field
   - Check the **Only Show Users with no permissions in this register** ❸ option
   - Press the **Rebuild Select User List Now** ❹ button

3. Select the user from the **Select User** ❺ list
4. Press **Save User** ❻
   - A message will display to inform you that the User is now activated



5. If required, modify the User's Profile as appropriate e.g. Assign the appropriate template in the **Login Details** section and press **Save User**

How do I delete a user?

Users can **ONLY** be deleted from the **General** tab

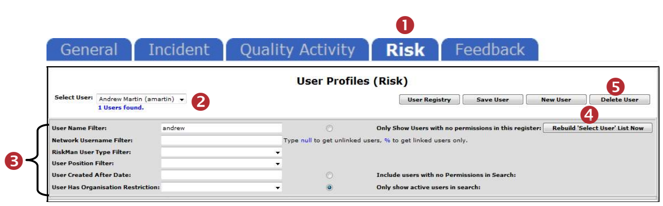
If you delete a user from any of the Register tabs it will **only de-activate** them from that specific Register

If you wish to delete a user who no longer works for your organisation then prior to deleting the user the following should be checked

- **Does the user have staff reporting to them or they report to a manager?** Check under the *Administration -> Manager Staff -> Staff Hierarchy* page and edit under the *Administration -> Manager Staff -> Edit Staff* page. Remove all relationships for that user
- **Does the user have an alert assigned to them?** Check under the *Administration -> Alert Management* page. Either remove the user from the allocated user list for that alert and assign a replacement, or delete the alert

To de-activate a user from a Register

1. Click on the specific **Register** ❶ tab e.g. Risk, Incident, Quality
2. Locate the user. Either
   - Select the user from the **Select User** ❷ list; or
   - Enter filter criteria in one of the filter fields ❸ and Press **"Rebuild 'Select User' List Now"** ❹. Select the user from the **Select User** ❷ list
3. Press **Delete User** ❺
4. A **message** ❻ will display to let you know that this user has been deleted from this Register only.



To delete a user from RiskMan

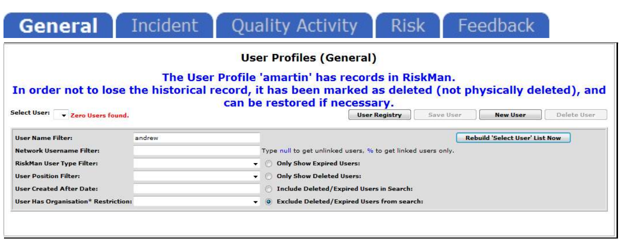
Deleting a user from RiskMan can only be done via the General tab

1. Click on the **General** ❶ tab

2. Locate the user. Either
   - Select the user from the **Select User** ❷ list; or
   - Enter filter criteria in one of the filter fields ❸ and Press **"Rebuild 'Select User' List Now"** ❹. Select the user from the **Select User** ❷ list
3. Press **Delete User** ❺

If the user has **<u>not used RiskMan</u>** they will be deleted from the database (as per example below).

If the user **<u>has used RiskMan</u>** then their user profile will be flagged as deleted and can be restored if required.



How do I restore a deleted user?

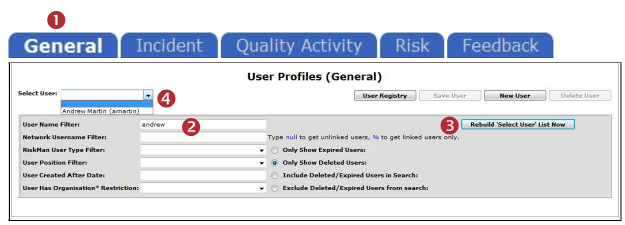
If a user has been deleted from RiskMan from the **General** tab and their User Profile was flagged as deleted, it will need to be restored under the **General** tab and then re-activated under each of the other Register tabs as required

Note: *Users will automatically be activated in the Feedback User Profile*

To restore a user that was flagged as deleted from RiskMan

1. Click on the **General** ❶ tab
2. In the Filter Criteria section check **"Only Show Deleted Users"** ❷
3. Press the **Rebuild 'Select User' List Now** ❸ button
   - The **Select User** ❹ list will now show all users who have been flagged as deleted. Select the user from this list

     Note: *It is optional to also include the other filter fields to locate the deleted users*



4. Press the **Undelete User** ❺ button

5. The User is now restored ❻ under the **General** tabs
   - If there are **no changes to the user's profile**, it will **not be necessary** to press the **Save User** button
   - If you wish to **make changes** to the user's profile, modify as required and press **Save User**
6. Repeat **steps 2 - 5** under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

To reactivate a user under a specific Register

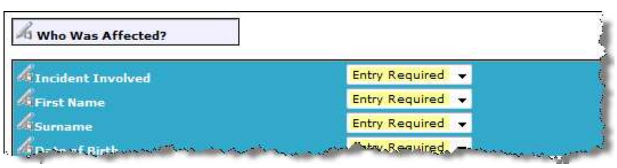
***Note:** This does not apply to the Feedback Register*

1. Click on the specific **Register** tab e.g. Risk, Incident, Quality
2. In the Filter Criteria section check **"Only Show Deleted Users"**
3. Press the **Rebuild 'Select User' List Now** button
   - The **Select User** list will now show all users who have been flagged as deleted. Select the user from this list

     ***Note:** It is optional to also include the other filter fields to locate the deleted users*
4. Press the **Undelete User** button
5. The User is now activated under the selected Register
   - If there are **no changes to the user's profile**, it will **not be necessary** to press the **Save User** button
   - If you wish to **make changes** to the user's profile, modify as required and press **Save User**

Modifying the Field & Section Labels/Colours on a Register Form

The label of a **Field** or **Section Name** and the background colour of a Section can be modified if the following icon appears in front of the Label



***Example:** Fields on the Incident Entry form*

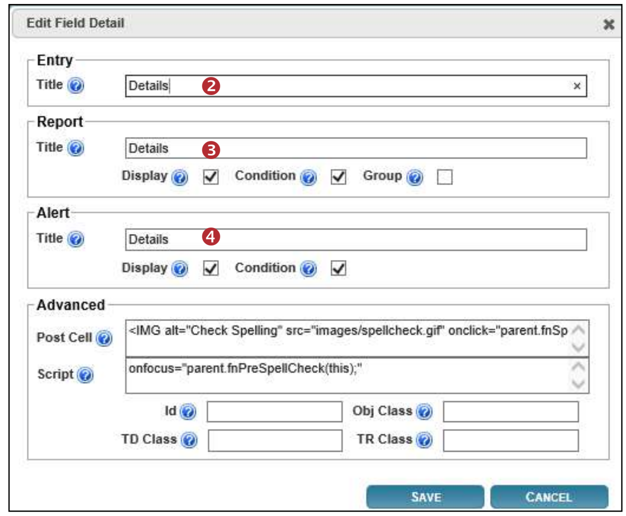
To be able to modify the label of a field or background colour of a section on a Register form

- The user requires the following **Administrative Permission** under the **General** tab: **Can Modify Global Settings**
- A user profile needs to be open in the respective Register

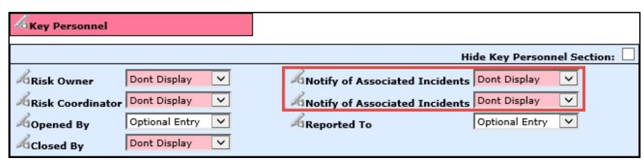
1. Click on the respective **Register** ❶ tab
2. Select any user from the **Select User** ❷ list

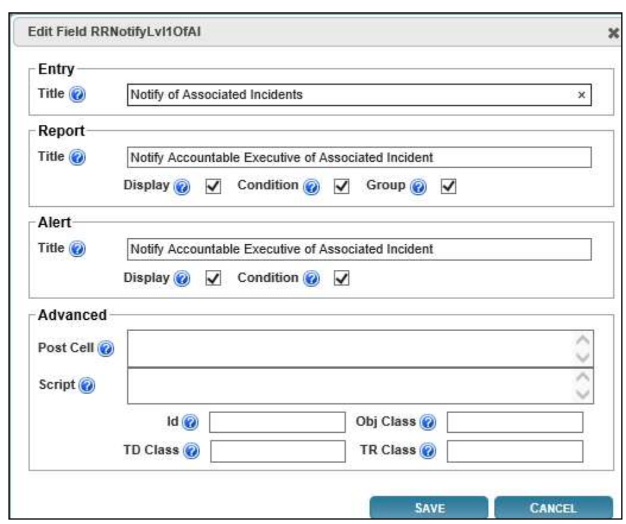
To modify a field label

1. Click on the icon ❶ next to the respective field

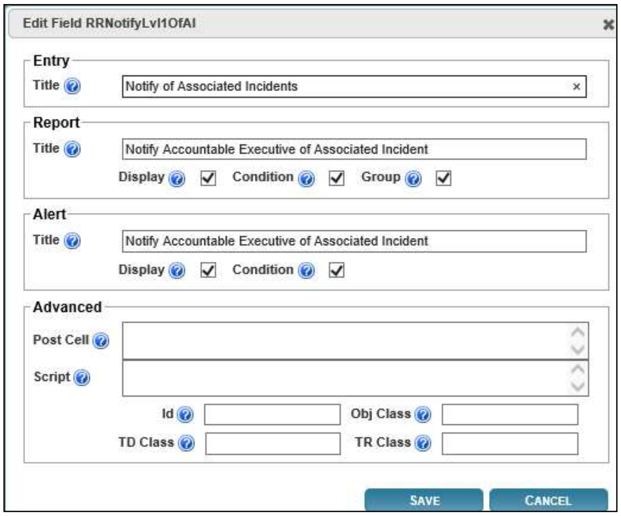


1. Enter the label in the **New Title Text** ❷ field *(this is the field on the respective Register form)*
2. The new title should be reflective in the **Reports** and **Alerts,** so modify the **New Reporting Title** ❸ and **Alert Title** ❹ fields accordingly
3. If your Entry form has more than one label with the same name, ensure the labels for the **Alert Title** and **Report Title** are such that users are able to distinguish which Entry form label the field is referring to *(refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)*



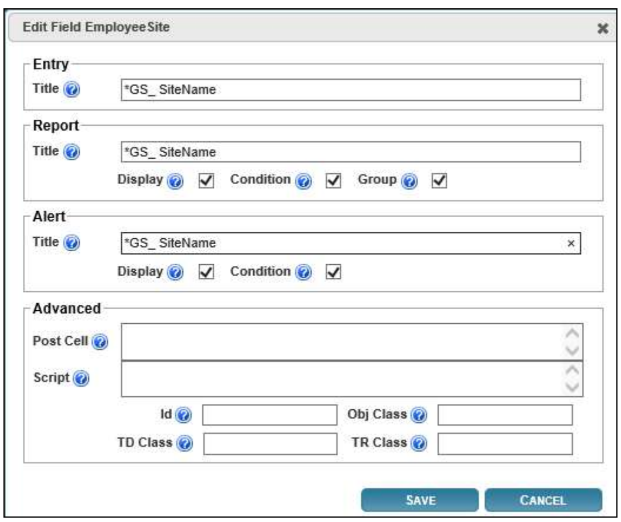


***Example:** "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form*



***Example:** "Notify of Associated Incidents" referring to the Responsible Manager on the Risk Entry form*

6. If a field label is determined by the **Global Settings** e.g. Site, Location, Program; the **Title Text**, **Report Title** and **Alert Title** will be displayed in a similar way to that in the example below of the "Site" field



7. If you make a change to any of these labels, it will only affect the label on that Register Entry form and will **NO LONGER** obey the Global Settings label. An example where this may be useful

   Global Settings = Site where Incident Occurred

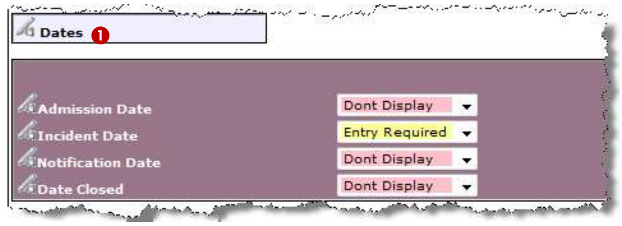
   This would be useful on the Incident Entry form but not on the Risk Register, Feedback Entry or Quality Activity form. You might want to call this field

   - **Site of Risk** in the Risk Register
   - **Site** on the Quality Activity form
   - **Site where Feedback is initiated** in Feedback*

8. Press **Save** when complete

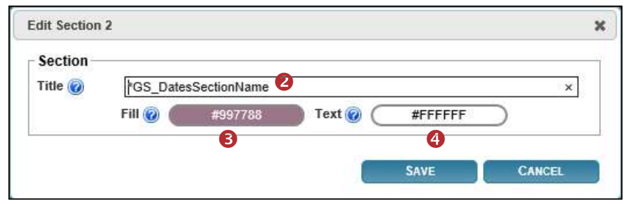
To modify a Section Title/Colour or Background Colour

1. Click on the icon ❶ next to the Section Title



2. Modify the label in the **Current Section Title** ❷ field *(this is the field on the respective Register form)*

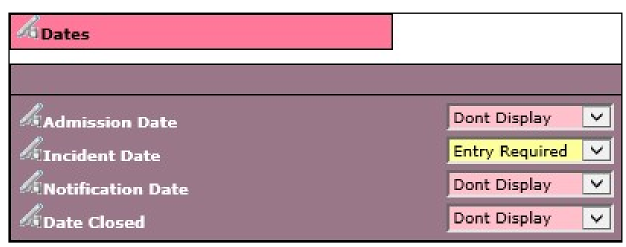
   ***Note:** If the title starts with *GS_ it means that the label is coming from the Naming Conventions in the Global Settings. If the label is changed it will not be affected by future Global Setting changes and will only affect that Register*



3. To change the background colour and text colour of the section click on the respective **Choose Background Colour** ❸ or **Choose Text Colour** ❹ buttons and a colour picker will display. Select your colour. If you want the colours to be the same as another section, copy the respective **Colour code** e.g. #997788 from one section to the other

   ***Note:** If you want Black text enter the colour code **#000000.** Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support - support@riskman.net.au*

4. Press **Save** when complete



***Example:** "Dates" section after changing the text and background colours*

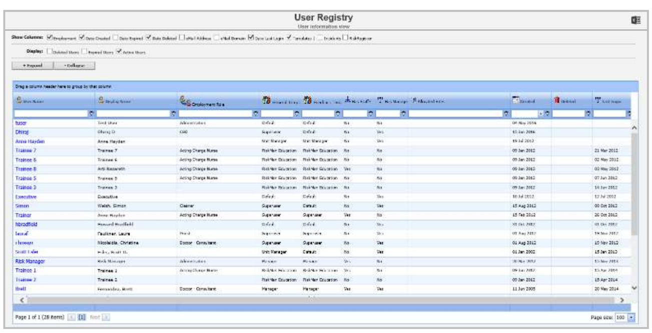
How can I view a summary listing of all the users in RiskMan?

The **"User Registry"** page provides you with a summary list of all registered users in your RiskMan. Depending on any Entry/Update restrictions you have in your User Profile, you will only be able to view users that match your restrictions

To access the User Registry page either

1. Click on the **User Registry** button at the top of any of the User Profiles pages or select *Administration -> User Permissions -> User Registry* from the menu

2. The list of users you have permission to view (this could be all users or users matching your Entry/Update Restriction Details) will be listed. These users may be grouped by a column (depending on the last time you visited this page) or ungrouped



Display Option Definitions

- **Show Columns:** Uncheck the columns that you do not want displayed in your list. Some columns will always display and therefore will not be an option to hide
- **Display:** Select the type of users that you wish to display in your list ie. Deleted Users, Expired Users, Active Users
- **Expand:** Click this button if you wish to view all the users in your list if the list is collapsed. Alternatively if you only wish to expand a specific group of users, click on the button next to the collapsed group of users
- **Collapse:** Click this button if you wish to collapse an expanded list of users that have been grouped. Alternatively if you only wish to collapse a specific group of users click on the button next to the expanded group of users
- **To export your list to Excel™** click on the **Export** button

User List

The following is a list of options available in the User List

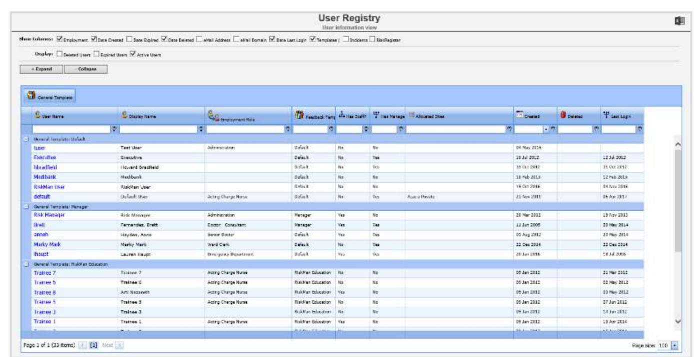
- **Username link:** If you click on the **username** it will direct you to the User profiles page. This is useful if you wish to make an alteration to a specific user profile e.g. delete the user (from the General tab) as they are no longer employed, change the user's template in one or more Registers

  To then return to your **User Registry** page, click on the **User Registry** button at the top of any of the User Profile tabbed sections
- **Email Address Link:** If you wish to send an email to a particular user, click on the user's respective **email address** link. An email will open with the email address auto-populated ready for you to send an email

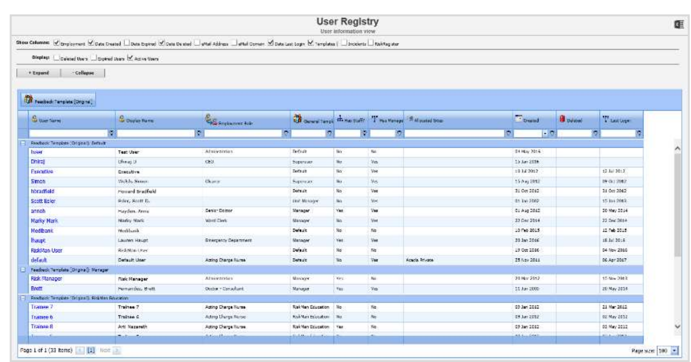
Suggested Groupings for your User Profile List

The list of users can be grouped by any of the column headings – *refer to examples below*

1. **Templates** – Indicates the General or Register specific Template a user is assigned to.



Example:** User's grouped by their assigned **General Template



***Example:** Users grouped by their assigned **Feedback Template**.*

2. **Display Name** – Checks to see if a non-network user has more than one logon in RiskMan

How do I assign staff to Managers?

Refer to the **RiskMan Manager/Staff Relationships Guide** accessible via the menu *Help -> Reference Guides*