# Account Setup Instructions - Enterprise Risk Management (ERM)

## Integrated Risk

### 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 risk assessment. 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](mailto:taylor.johns+jimmy.fallon@workiva.com)) *This set-up will allow you to receive this dummy user's notifications via email.*

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## Assign Yourself a Risk Record

- Navigate via Data tab to your designated risk focus page
- Re-assign risk to yourself

## Miscellaneous Setup

- Leave some comments in different areas of Wdesk (in the presentation, in the risk focus page, 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.
- 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.

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