

RiskyProject Enterprise 7

Project Risk Management Software

Administrator's Guide



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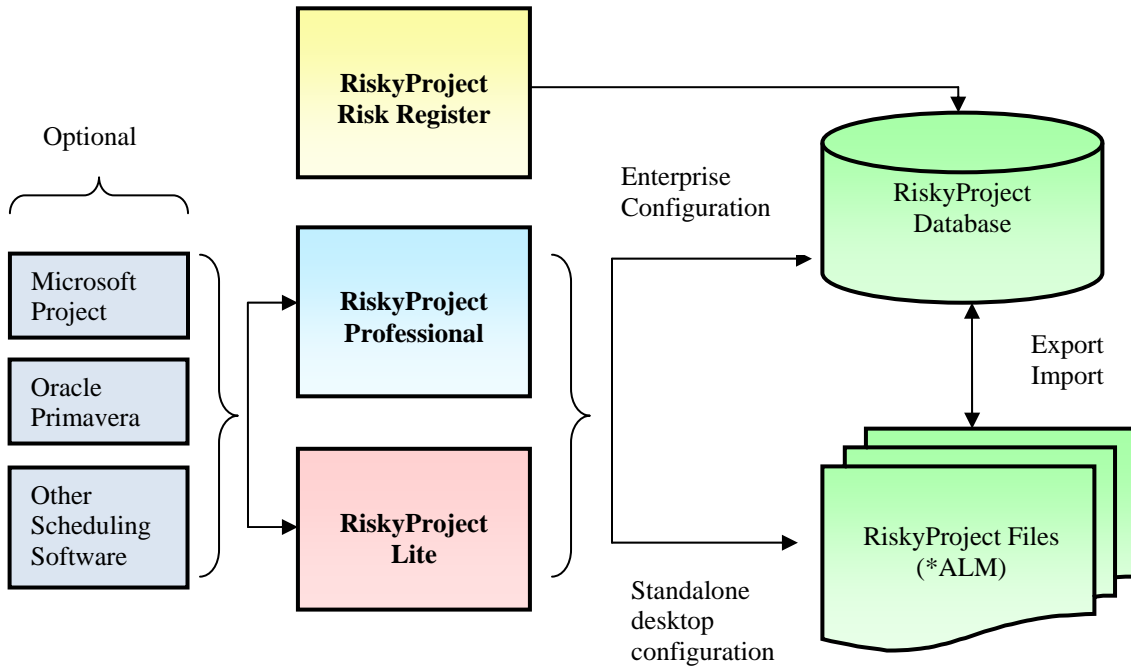
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Chapter 1: Introduction to RiskyProject Enterprise

About RiskyProject Enterprise

RiskyProject is project risk management software. RiskyProject can be configured as standalone desktop software, which saves files to the set of files for each project, and enterprise software, which saves data in the database. As the same installation package is used for desktop and enterprise software, switching from one version to another is quick and easy. You can switch from one configuration to another two configurations using the RiskyProject user interface.



What do I need to install RiskyProject Enterprise

To install RiskyProject Enterprise you need to have:

1. RiskyProject Professional installation file:
 - RiskyProjectSetup.msi (for x64 version of the software) or
 - RiskyProjectSetup32.msi (for 32-bit version of the software)
2. License file (RiskyProject.lic)

License file includes the following information:

- Number of users
- Type of users: **concurrent** or **named**. If users are concurrent, only a limited number of users can be logged on to the enterprise system at the same time. If users are named, only a limited number of user names can be entered into the system.
- Duration of the license.

By default (without license files), the number of users is 1 and license duration is 1 month.

3. Access to the database. At a present moment, RiskyProject works only with SQL Server or SQL Server Express. RiskyProject supports SQL Server 2005 and later. SQL Server Express can be downloaded free of charge from the Microsoft web site.
4. RiskyProject Lite installation file (optional):
 - RiskyProjectLiteSetup.msi (for x64 version of the software) or
 - RiskyProjectLiteSetup32.msi (for 32-bit version of the software)
5. RiskyProject Risk Register installation file (optional):
 - RiskyProjectRiskRegisterSetup.msi (for x64 version of the software) or
 - RiskyProjectRiskRegisterSetup32.msi (for 32-bit version of the software)

Chapter 2: RiskyProject Enterprise Installation

Step 1: Install RiskyProject Professional

Use the RiskyProject Professional installation file to install RiskyProject Enterprise.

- RiskyProjectSetup.msi (for x64 version of the software) or
- RiskyProjectSetup32.msi (for 32-bit version of the software)

Step 2: Configure Access to a Remote Database

The RiskyProject database must be accessible by RiskyProject clients (RiskyProject Professional, RiskyProject Lite, or RiskyProject Risk Register), which are installed on computers on a network.

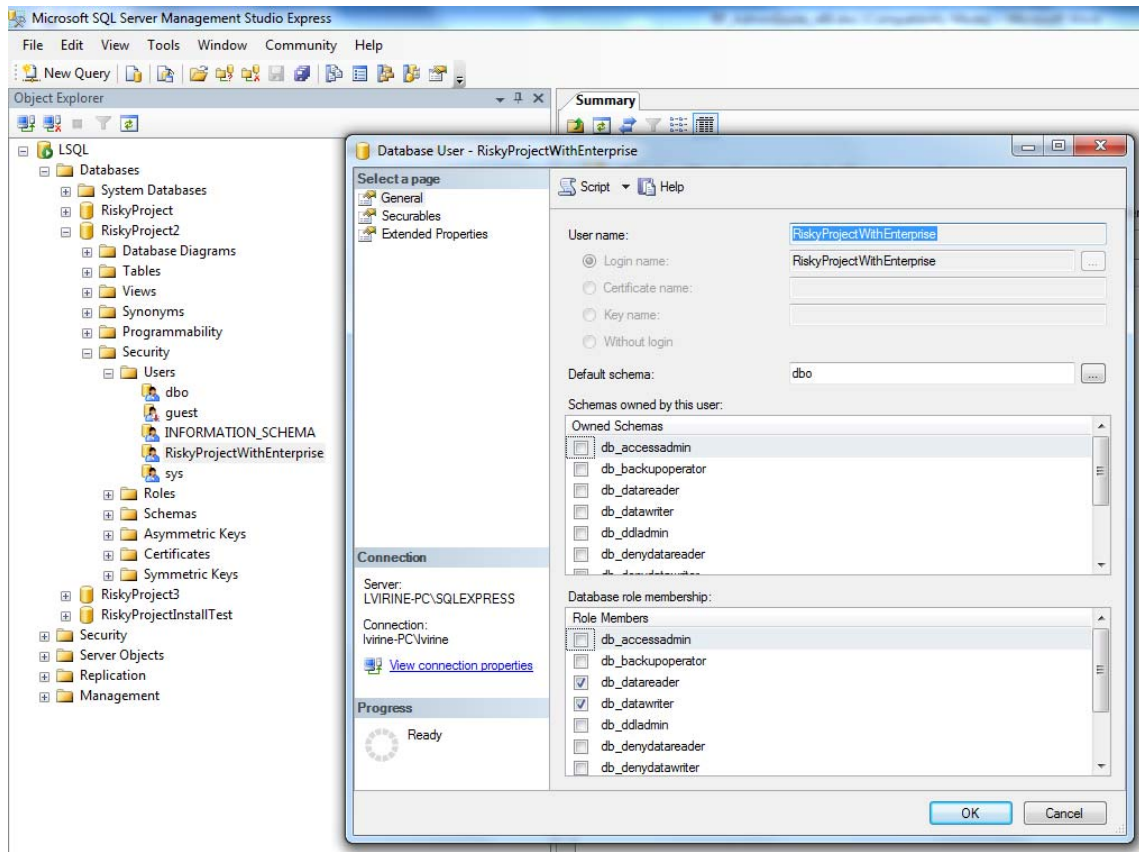
Firewall systems help prevent unauthorized access to computer resources. If a firewall is turned on but not correctly configured, attempts to connect to SQL Server might be blocked.

For more information regarding how to configure a firewall please visit:

<http://msdn.microsoft.com/en-ca/library/cc646023.aspx>.

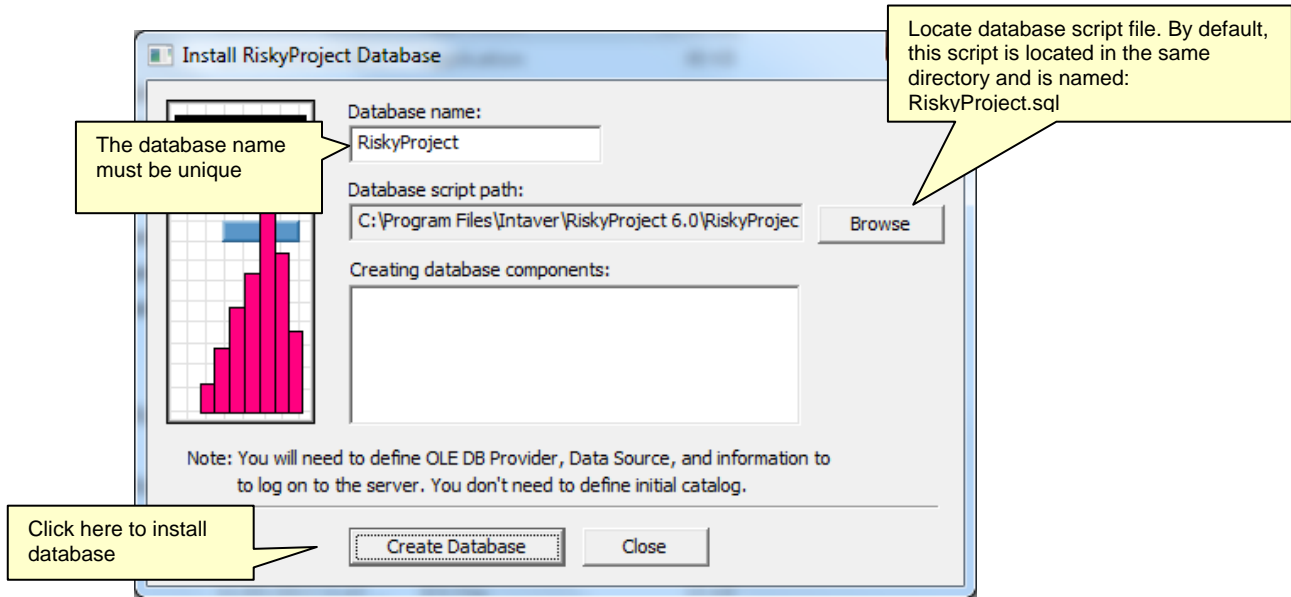
For each Windows user or group on your network that will be running RiskyProject Enterprise, you must use SQL Server Management Studio to create:

1. SQL Server Logins for all your users or groups
2. Once you have installed the RiskyProject Enterprise database (Step 3), users in the RiskyProject Enterprise database with memberships in the db_datareader and db_datawriter roles.

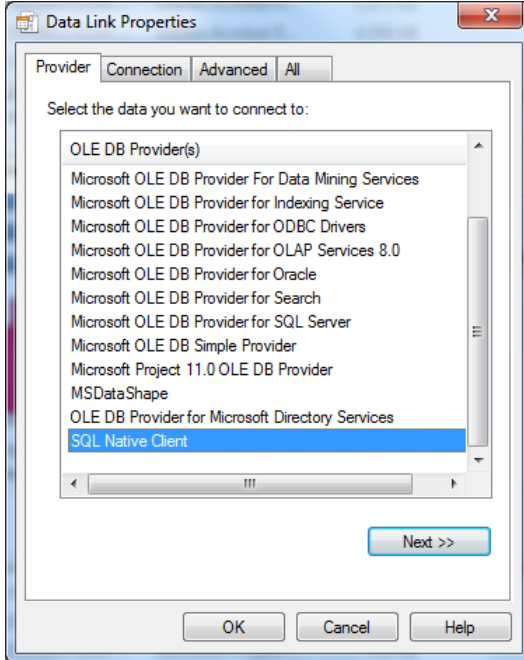


Step 3: Install Empty RiskyProject Database

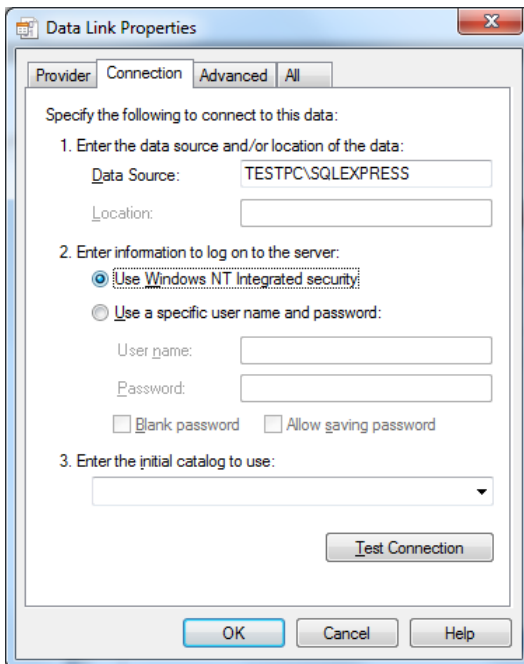
1. From RiskyProject directory (e.g. C:\Program Files\Intaver\RiskyProject 7) launch **RiskyProjectDB.exe**.



2. Select the database you want to connect to:



3. Specify data link properties. In *Enter the initial catalog to use* don't select anything.



4. Click **OK**. RiskyProject database will be created.

Step 4: Setup connection to database

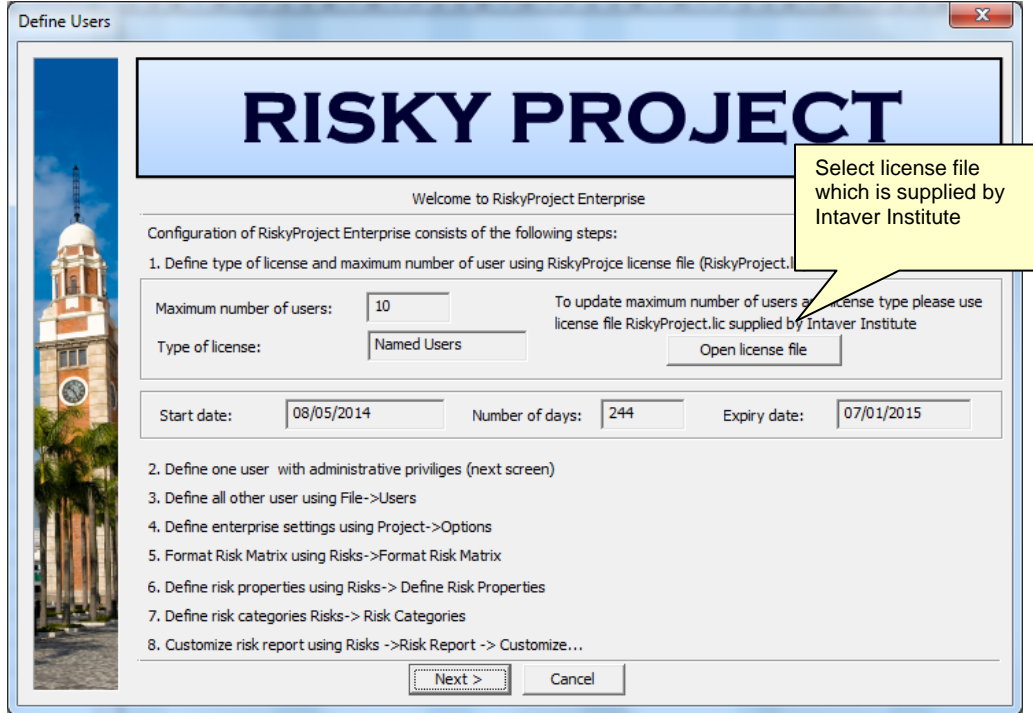
1. Launch RiskyProject Professional, RiskyProject Lite, or RiskyProject Risk Register
2. Select **Enterprise Client (requires database)**
3. Configure database connection: follow the same steps you use to connect to the database as you did in step 3. In *Enter the initial catalog to use* select the database you just created.
4. Enter user name **sa**. Do not enter any password. This user name will be used if there are no users in the database.

Step 5: Enable number of users, type of user licenses, and license duration

Number of users, type of user licenses (concurrent or named users) and license duration come from the license file, such as RiskyProject.lic. If this file is not available, default number of users will be 1, license duration will be 30 days.

- If you use concurrent user type, RiskyProject will control how many users can logon to the database at the same time.
- If you use named user type, RiskyProject will control how many user names can be available.

You may switch type of users, number of users, and license duration at any time. To do so, you would need a new RiskyProject license file (RiskyProject.lic). You may enable this file using File-> Users -> Users tab.



Step 6: Create the Administrator User

The next step in the process will create a system administrator.

To create the system administrator:

1. Click **Next**. The **User Profile** dialog box opens.
2. Enter information for the first user. Only the **User Name** is required. The initial user is always given the administrators role.

Enter user name. You will be prompted to enter a password in subsequent dialog.

User Profile

User Name:

Role:

First name: Last name: Initial:

My contact information

Company: Division: Group:

Address:

City: Country: Postal Code:

Bus. Phone:

Home Phone:

Cell Phone:

E-mail:

Emergency contact information

First name:

Last name:

E-mail:

Bus. Phone:

Permissions

Create risks Create mitigation/response plans Create projects

Modify risks Modify mitigation/response plans

Delete risks Delete mitigation/response plans

3. Click **OK**.
4. You will be prompted to provide a password. Enter password for the first user. Next time you log on to RiskyProject, use this user name and password; user name **sa** will not be valid anymore.

Installing RiskyProject Sample Database

RiskyProject comes with a sample database, which includes sample data. The sample database will help you to learn how to use RiskyProject. To install the sample database:

1. Download the script called **RiskyProjectSampleDB.sql** from <http://intaver.com/products/riskyproject-enterprise> and save it in the temporary folder.
2. Start **RiskyProjectDB.exe** from the RiskyProject directory.
3. Click Browse and select the script called **RiskyProjectSampleDB.sql**
4. Configure access to the database by following the steps outlined in “*Step 3: Install Empty RiskyProject Database*”
5. Set up database connection by following the steps outlined in “*Step 4: Setup connection to database*”. Administrator’s user name is **Admin**, password is **Admin** (case sensitive).



You can also execute the same script using Microsoft SQL Server Management Studio.

Chapter 3: RiskyProject Enterprise Configuration

About User Management

In RiskyProject enterprise, user management is based on users, roles, and permissions. Each individual who accesses the system, should be assigned user logon credentials which are defined in the User Administration panel. Users can be assigned one of three roles: Administrator, Manager, or User.

About Roles

RiskyProject Enterprise has 3 defined roles that can be assigned to users: Administrator, Manager, and User.

Administrator: has full access to RiskyProject, including managing permissions.

Manager: may have full access to RiskyProject except managing users and updating user permissions. The manager's permissions can be limited by an administrator.

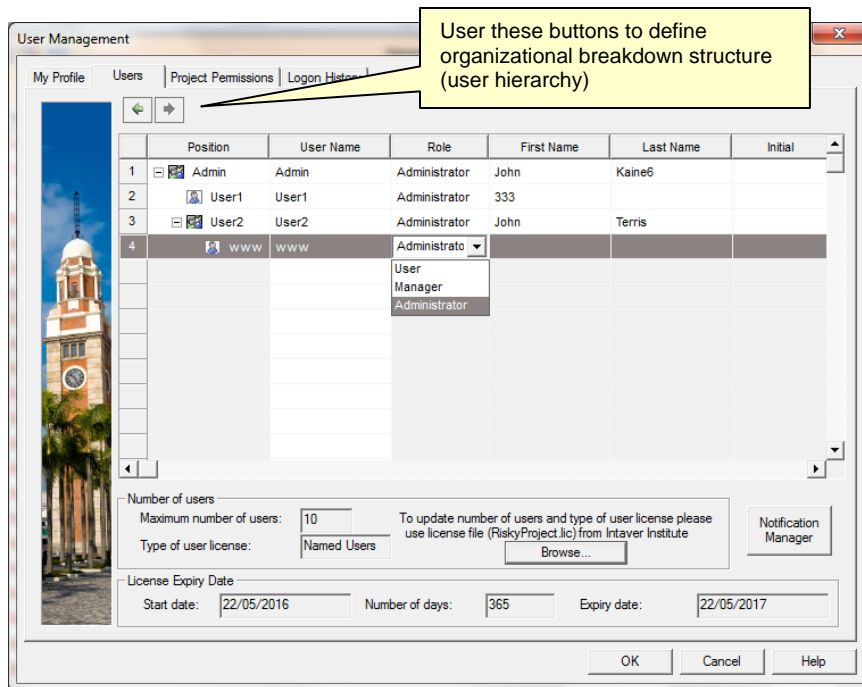
User: cannot manage users, modify portfolio settings, or delete projects. In addition, an administrator can limit a user's permissions.

Create a New User

Once you have created the Administrator role, you can create a new user.

To create a new user:

1. Click the **Users** tab.
2. In the **User Name** column, click in an empty role and type in the user name.
3. Using indent and outdent arrows create user hierarchy.
4. Select a role for the user.



5. Right-click on the user and click **User Profile**. The User Profile for the new user opens.
6. Add user information as required.
7. In the **Permissions** group, select the permissions that you want to grant to the user.
8. Click **OK** to save the user profile.



- The project permission tab is not shown if the database does not have any projects. This may occur if you just created a database.
 - If you grant or deny permissions to certain users on a summary project, the permissions will be propagated down the project hierarchy to all sub-projects.
-

About the Logon History

The Logon History allows the Administrator to view the entire logon history of all the system users. The history includes:

- User Name
- Role
- Logon Time
- Log off Time
- Computer ID; computer ID is shown in RiskyProject About dialog (question mark at the right upper corner of RiskyProject window)
- Number of users currently logged on
- Number of rolling months that logon history will be kept.

To access logon history:

1. From the **File** menu, click **Users**. The **User Management** panel opens.
2. Click the **Logon History** tab.

Delete all open sessions

As an administrator, you can remove logon sessions that are currently open from the list. This can be useful if the user “killed” the application without properly exiting it. If you use the concurrent user licensing model, it would limit the number of concurrent sessions and users may not be able to logon to RiskyProject.

To delete open sessions, click **Delete** all open sessions.

Set the number of months logon records are kept

Depending on the number of users you have, you may want to keep the history at a manageable size.

To set this period, type in the number of months in the months box and click **OK**.

Delete sessions from the list:

1. Select the sessions you want to delete.
2. Click the **Delete selected sessions** button.

Updating RiskyProject Enterprise License

You may update RiskyProject Enterprise license information:

- type of users (concurrent or named users)
- maximum number of users
- license duration

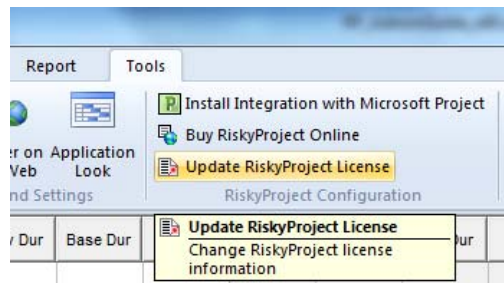
You would need to obtain a RiskyProject license file (RiskyProject.lic) from Intaver Institute Inc. Only an Administrator has to capacity to update license information.

To update RiskyProject Enterprise license information:

1. From the **File** menu, click **Users**. The **User Management** panel opens.
2. Click the **Users** tab.
3. Click on **Browse** and locate new RiskyProject.lic file.
4. Click **OK** or switch to another tab.

Switching Between Enterprise and Standalone Desktop Configurations

You may switch between Enterprise and Standalone desktop configurations of RiskyProject and vice versa at any moment. To do it use the **Update RiskyProject License** button on the Tools pane of the toolbar.



1. If you switch from **Enterprise** configuration to **standalone desktop** configuration you must have a license of RiskyProject standalone on your computer. If Enterprise configuration is saved in the database, the standalone license is saved in the Windows registry. You would need a license number, which is provided by Intaver Institute Inc.
2. If you switch from standalone desktop configuration to enterprise configuration, you need to define database connection properties in the manner described in *Chapter 2: RiskyProject Enterprise Installation*.
3. If you are in Enterprise mode, you may want to connect to a different database. Click on **Update RiskyProject License** and select **Enterprise: update database parameters**. You will be prompted to define database connection properties.



- You may switch from Enterprise configuration to standalone desktop configuration by clicking on Start regular desktop license (no database) with the RiskyProject Enterprise logon dialog.
- If the database connection is not available and your current configuration is Enterprise, you will be prompted to define database connection properties.
- Your database connection properties are saved in the system registry:

Computer\HKEY_CURRENT_USER\Software\Intaver\RiskyProject Pro x.x

If this registry entry is deleted or updated, you may be prompted to define database connection properties again.

Connecting to a Different Database

You may connect RiskyProject Enterprise to a different database. To do so:

1. Click on the **Update RiskyProject License** button on the Tools pane of the toolbar.
2. Select Enterprise: Update database parameters
3. Restart RiskyProject.
4. Define database connection properties in the manner described in *Chapter 2: RiskyProject Enterprise Installation*.

Other RiskyProject Configuration Steps

RiskyProject configuration consists of the following steps:

1. Configure users using File->Users...
2. Define enterprise options using Project->Options, such calendar options, calculation options, default risk options, and others
3. Format Risk Matrix using Risks->Format Risk Matrix
4. Define risk properties using Risks-> Define Risk Properties
5. Define risk categories using Risks-> Risk Categories
6. Customize reports using:
 - Risks ->Risk Report -> Customize...
 - Report->Statistics Report->Customize...
 - Report->Task Report->Customize...
 - Report->Report: All Risks->Customize...

All steps except for user configuration are described in the RiskyProject User Manual.

For enterprise configuration all these settings and options are saved in the database. These settings are common for all projects within a portfolio. The exception is Project Options. Project Options and portfolio options can be different. Once a project is created and imported, it is possible to define individual options for each project using Schedule->Options. However, the system administrator may deny users the ability to define options for individual projects using the settings on Project->Option.



Resources and calendars are defined on the project level and cannot be automatically shared within a portfolio.

Configuring Integration with Proteus Envision®

RiskyProject Enterprise is integrated with Proteus Envision by SNA Software. To configure integration with the Proteus Envision:

1. Go to **Projects** tab
2. Click on **Preferences**
3. Click on **Envision Database Connection Settings**
4. Define database connection properties in the manner described in *Chapter 2: RiskyProject Enterprise Installation*.

Notification Messages

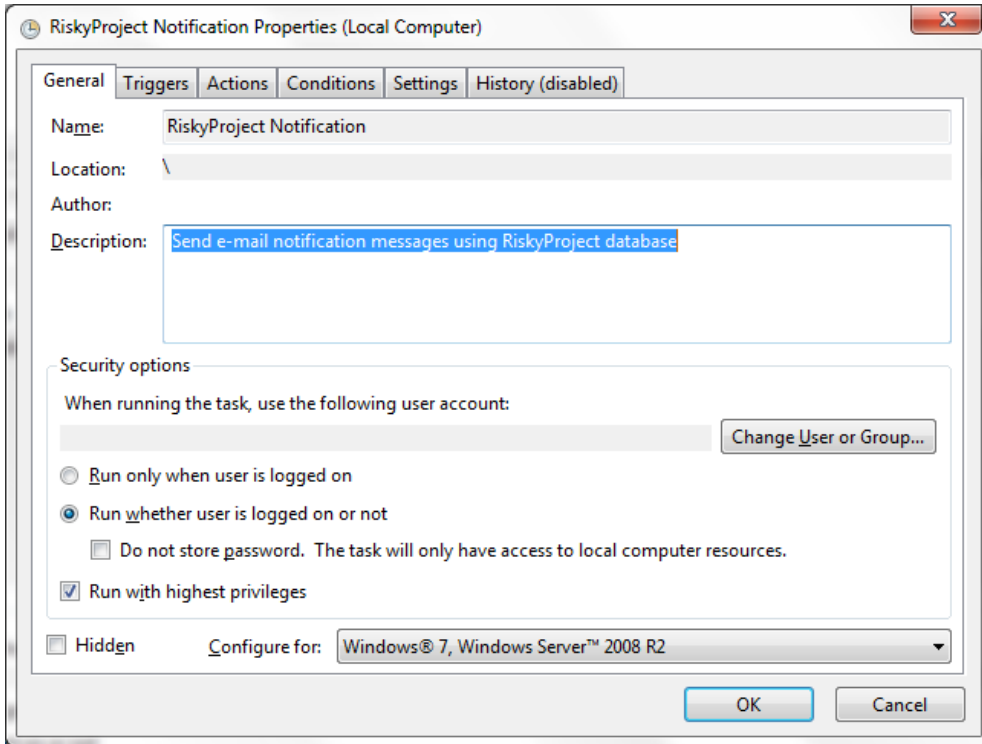
RiskyProject supports sending notification messages to its users via e-mail. RiskyProject can be executed using Windows Task Scheduler every 5 – 15 minutes without preventing user interface and send out notification e-mails. Notifications can be configured using Notification Manager. Notification Manager is accessible from **Tools -> Notification Manager** or from **File -> Users -> Users Tab -> Notification Manager**. After notifications are configured, RiskyProject can read data from notification messages from the RiskyProject database and send them.

Using Windows Task Scheduler for Sending Notification Messages

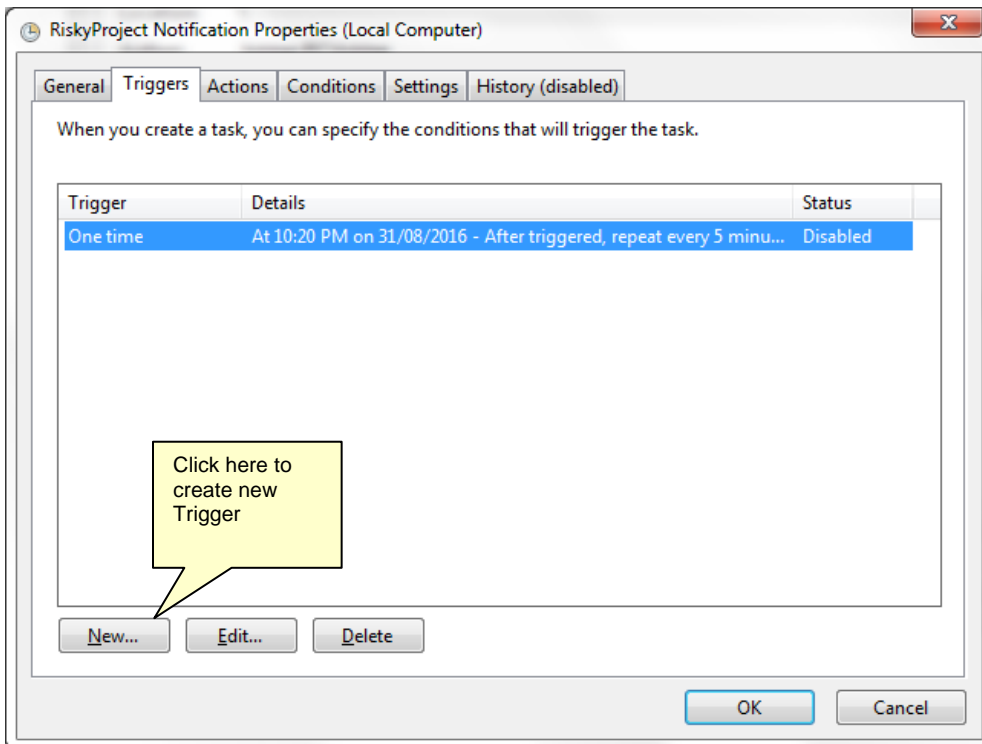
To execute RiskyProject using Windows Task Scheduler for notification messages it is recommended to install RiskyProject Professional, Lite, or Risk Register on the server. This installation can be done exactly the same way as on a client's computer. A dedicated user can be created to execute RiskyProject for notification messages. The user name and password for RiskyProject installed on the server will be encrypted and saved in the registry. When RiskyProject is executed by the Task Scheduler, no interface will be prevented and user name and password will not be asked.

To configure Task Scheduler for notification messages:

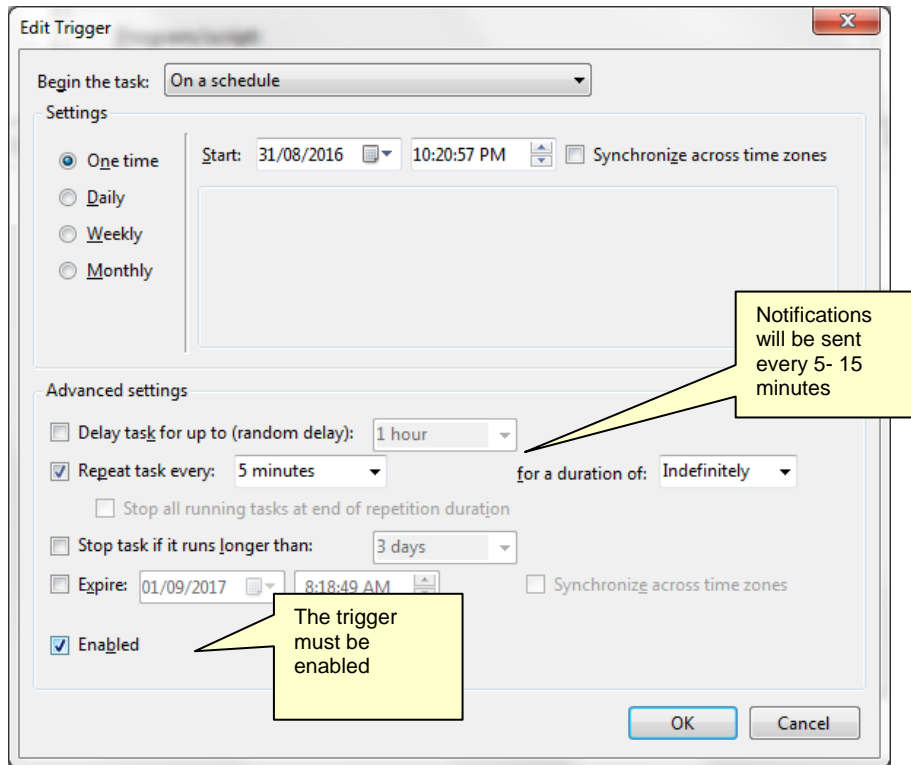
1. Start **Task Scheduler**. Task Scheduler can be found by clicking on the Windows Start button and typing "Task Scheduler" in the Search box.
2. Go to Console Tree (left pane) and click on **Task Scheduler Library**. If Console Tree is not displayed, use "Show/Hide Console Tree" button in toolbar to show Console Tree.
3. Right click on central pane, which includes a list of scheduled tasks. Select **Create New Task...** Properties dialog comes up.
4. Go to **General** tab. Enter task name, e.g. "RiskyProject Notification" and description, e.g. "Send e-mail notifications". We recommend checking RiskyProject Notification "Run whether user is logged on or not".



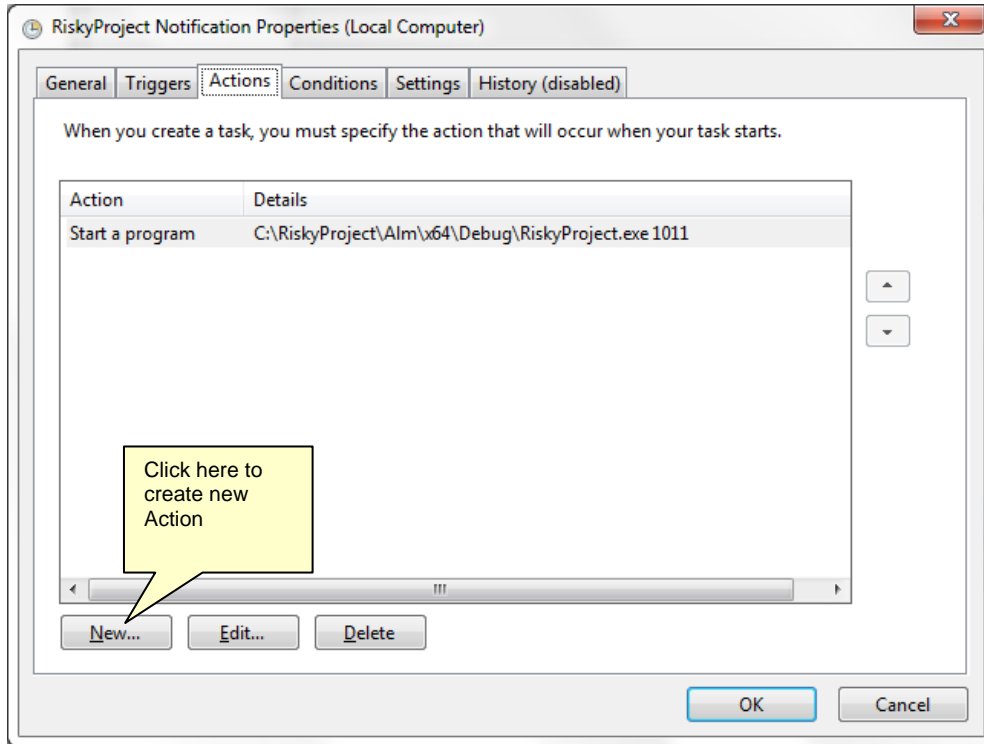
5. Go to **Triggers** tab and create a new trigger by clicking on the New button at the bottom of the dialog.



- In Edit Trigger dialog enter Trigger properties. The task may start at the current time and then be repeated every 5-15 minutes for the duration of "Indefinitely". To enable this trigger check the Enabled checkbox at the bottom of the dialog.



- Go to the Action tab and click on the New button at the bottom of the dialog. The Edit Action dialog will come up.



8. In the Edit Action dialog click Browse, click on Browse button and select RiskyProject.exe from your RiskyProject directory.
9. Enter argument 1011.

