Manual RISKID – Normal user

RISKID | www.riskid.nl

Go to manual.riskid.nl (pw: riskidmanual) for the latest version of this manual.

v.1.16.0

Contents

Introduction

Welcome to the RISKID manual. In this guide we try to help you get started with the use of RISKID. Different manuals have also been created for the different roles within RISKID. For the complete overview of all functionalities, you can always consult the administrator manual. If you cannot find a solution, please contact helpdesk@riskid.nl.

In RISKID there are three authorities:

1. **Administrator** – the person in the organization that manages RISKID. This person has access to all projects, can add/modify users and manages the collections and tags.
2. **Project manager** – a combined role for project managers and facilitators.
    a. Project manager – a user who manages projects. A project manager only sees his own projects.
    b. Facilitator – a user who facilitates session.
3. **Normal user** – a merged role for team members and participants.
    a. Risk owner/action holder – a team member of a project assigned to a risk or measure.
    b. Participant – a participant in a session.

For the manual or instructions for participants of a RISKID risk analysis session, we kindly refer you to the invitation templates we gave you during the training or our animated instructional videos on our YouTube channel.

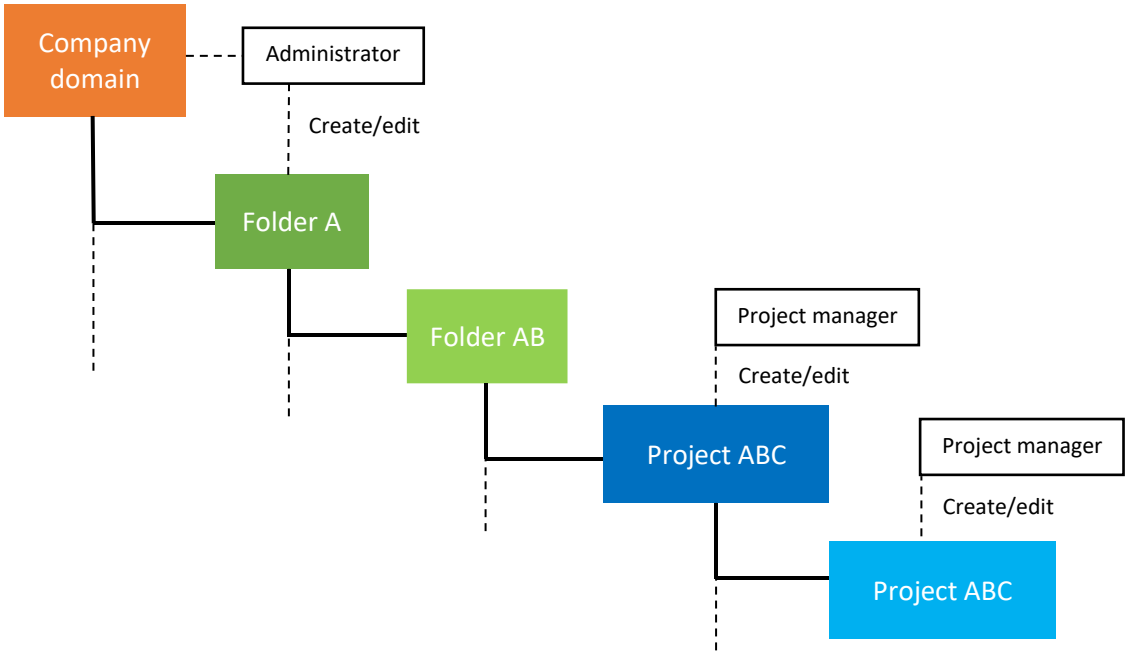
RISKID structure

RISKID uses a certain structure of how folders, projects and sessions relate to each other. Below is explained what these relationships are, and which roles users can fill.

- **Company domain**: the company domain is the highest level; it contains all the folders and projects that you create in RISKID. In general, the business domain is the same as the name of your organization or company. The link you type into your browser represents the domain, for example: http:// ***mycompany.riskid.nl***. The **administrator** is the person or persons within the organization that manages/manages the domain. These users have access to all projects, can add/modify users and manage admin settings.
- **Folder**: a way to structure and categorize projects within the domain. A folder can only be created by an **administrator**. Multiple projects can be placed in a folder and folders can also be placed under each other. Here you will find more about creating and organizing folders.
- **Project**: you can create projects within your company domain. But you can also enter your department name as a project if you want to inventory and manage your departmental risks. The design of your domain is entirely up to you. In RISKID we use the term *projects* for the level below the business domain. The **project manager** is the owner of a project. **Team members** are users who are added to a project to be assigned as risk owner or action holder. With the follower's module you can assign followers to a project that do not have writing rights. Under a project, you can also place projects and create a hierarchy. How to do this is explained in projects.
- **Session**: within a project you can hold risk workshops, which we call *sessions*. A session is our characteristic risk workshop in which you can invite participants to brainstorm together about risks, then assess them for opportunity and impact and then discuss the results guided by the facilitator in a good conversation. The **facilitator** is the owner of the session. Go to session management to read how to create and manage sessions yourself.

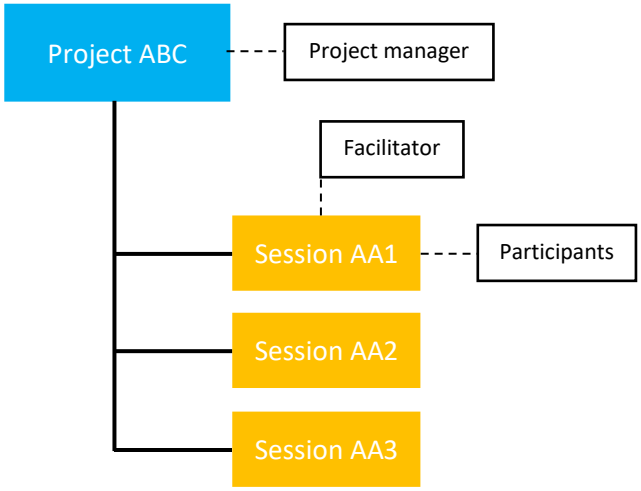
A user in RISKID has one authorization (administrator, project manager, or normal user), but can have multiple roles. For example, a project manager is a participant in a session. The authorization indicates what this use can and may technically do in the system, with the role indicating what the user does and how he or she fills it in.

Roles	Actions	Administrator	Project manager	Normal user
Administrator				
	Manage users	✓		
	Create and manage folders	✓		
Project manager				
	Create and manage project	✓	✓	
	Add team member	✓	✓	
	Create session	✓	✓	
Facilitator				
	Facilitate and manage session	✓	✓	
Team member				
	Managing risk	✓	✓	✓
	Manage measures	✓	✓	✓
Participant				
	Participate in sessions	✓	✓	✓



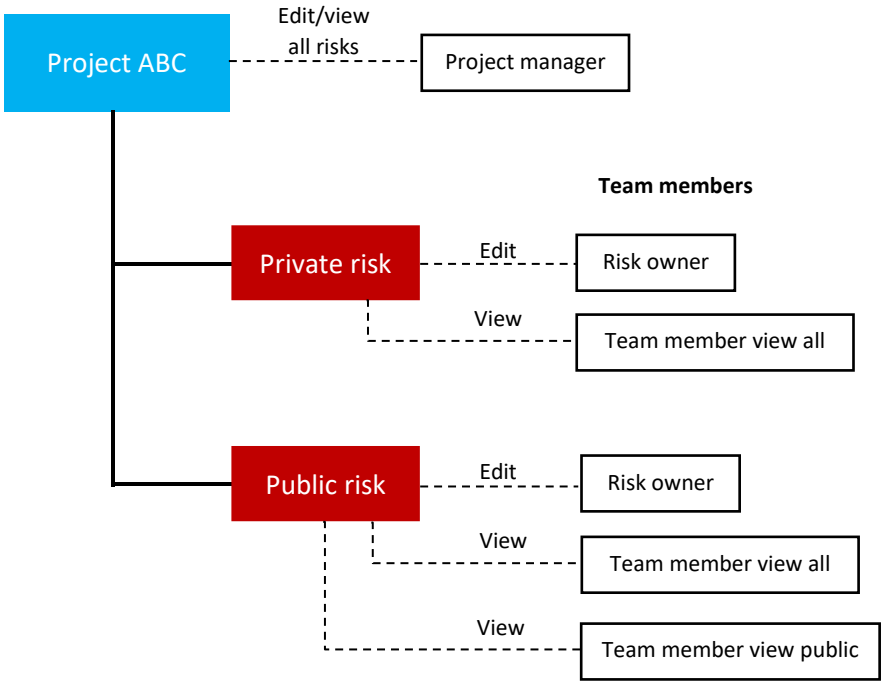
Here you can see the hierarchy for projects and folders illustrated. The administrator creates folders and project managers can create projects and place them in the folders.

How this works further can be found in Project list and Create Project.



Shows the hierarchy and relationships between projects and sessions. The owner of a project is the project manager and can create sessions in the project. The facilitator (can be the same user or another user) owns a session. Users who participate in a session are called *Participants*.

How this works further can be found in Session Management.

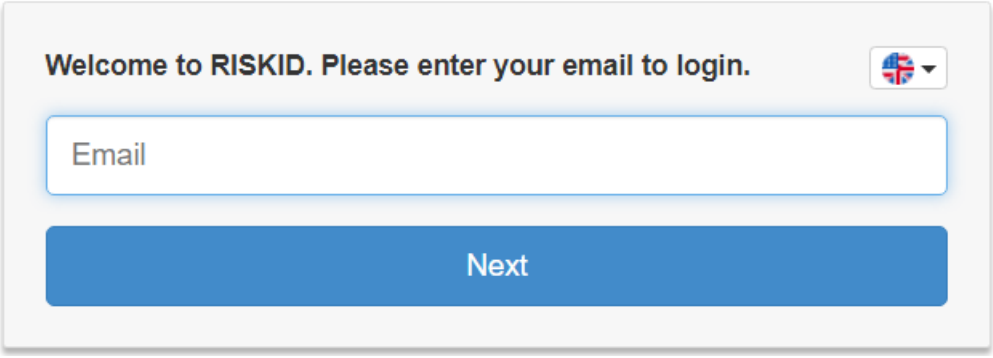


Here is how read and write permissions work within a risk project. In a project, risks can be marked as private or public. For Team Members, the project manager can specify which reading rights a team member has. With a team member who is allowed to see everything, both private and public risks are shown. For a team member who is only allowed to see public risks, only the public risks are shown. The last option is that a team member should only see their own risks. A risk owner may always see and edit his own risks regardless of whether they are public or private and whether this person is allowed to see all or only public risks.

You can find out how this works further in Adding team member/follower and viewing and adjusting risks (highlighting risks publicly or privately).

Log in

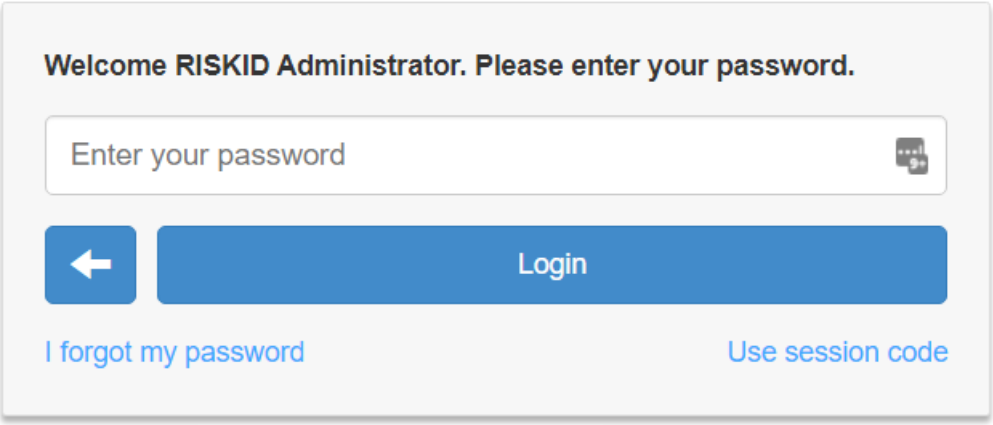
Via the login link of your own domain (https://***mijnbedrijf.riskid.nl***) you will be taken to the RISKID login screen. Here you can log in to your RISKID environment with your email and password. When you log in for the first time, you need to verify your email address.



Join a session

If you want to participate in a risk workshop session, you can do so in 2 ways.

1. After entering your email, the system will ask for your password because the system recognizes you as a user.
2. At this time, you can choose to go to the session instead of logging into your account. Then click on: *Use session code*.
3. On the screen after the session, enter code to go to the session as a participant.



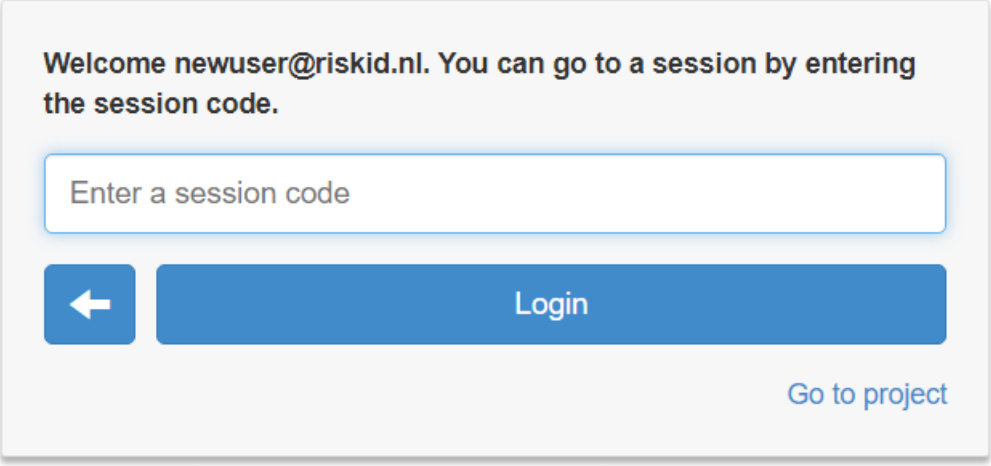
The second way is when you are already logged in to your account.

1. Go to My Sessions from the left menu.
2. Then click the *Add Session* button.
3. Enter the session code. The session in question appears in the list.
4. Click the *Join* button behind the session.

Account

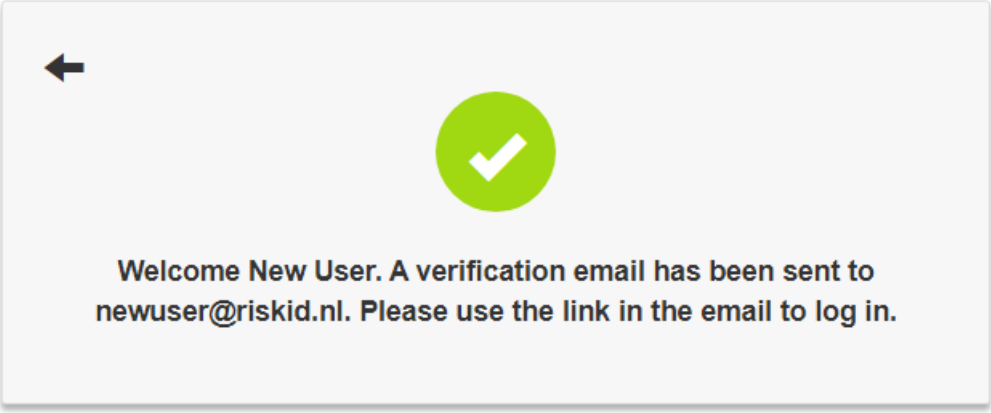
When a user is added by the administrator or as a team member/follower of a project, this user can create an account. This means that this user must create a password the first time. Users who can also manage projects in RISKID such as the project managers and administrators must verify their email address. After doing this, the users can log in as described under Login.

Normal user



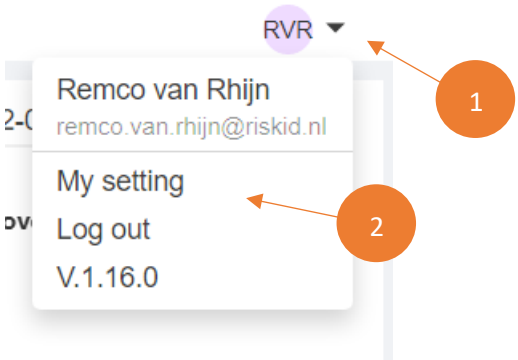
A normal user will see this screen after entering the email address. The user can go directly to a session via a session code or go to projects in the bottom right and create a password.

Project manager/administrator



A project manager or administrator will see this screen after entering the e-mail address. A verification email is automatically sent with a link to create a password.

User options

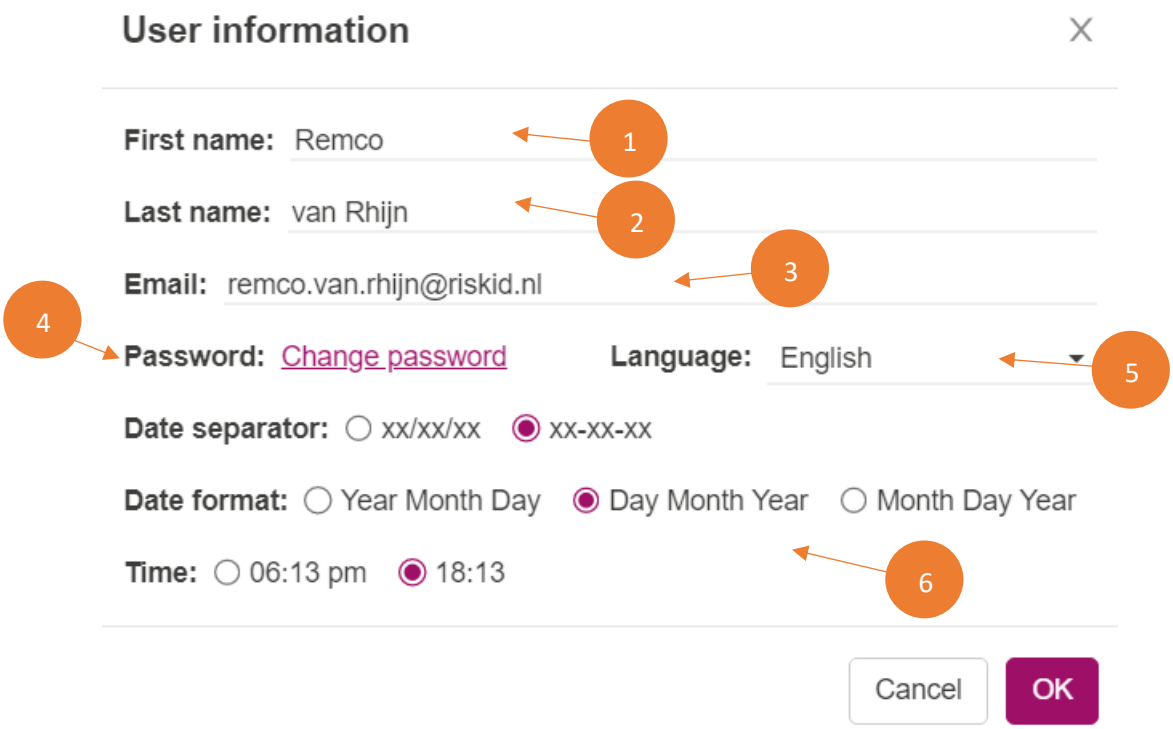


After you have logged in, you have the option to change your user settings. These options can be found at the top right of the screen.

As a user of RISKID, you have access to certain options such as: change language and change your profile.

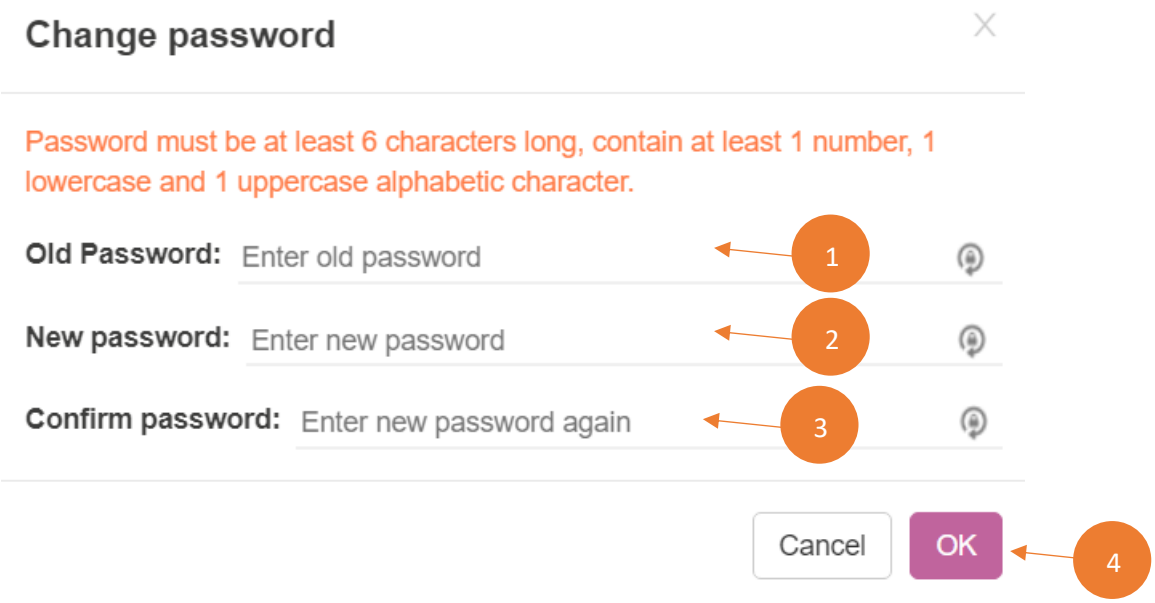
1. Click on your initials in the top right to customize your profile.
2. Go to *My Settings* to change your profile.

Customize profile



1. Change your first name here.
2. Change your last name here.
3. Change your email address here.
4. Click here to change your password.
5. Click here to change the language.
6. Here you can indicate your desired format of date and time.

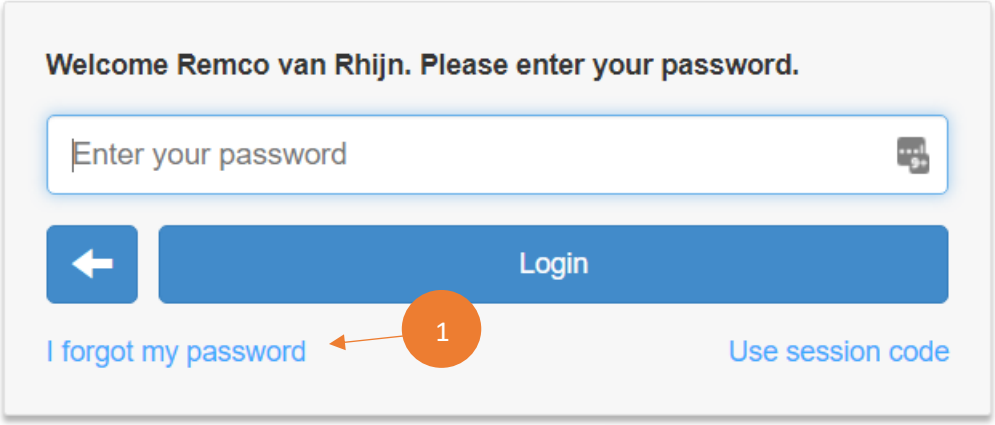
Change password



In this screen you can change your password. You can get here by pressing your initials in the top right corner of the initial screen, clicking on my settings and then pressing the *Change Password* button.

1. Enter your current password here.
2. Enter your new password here.
3. Enter your new password again here to confirm.
4. Click *OK* to confirm.

Password



1. After logging in with your email address, you have the option to reset your password. An email with a link to your email address is automatically sent. After clicking on that link, you can create a new password.

My risks

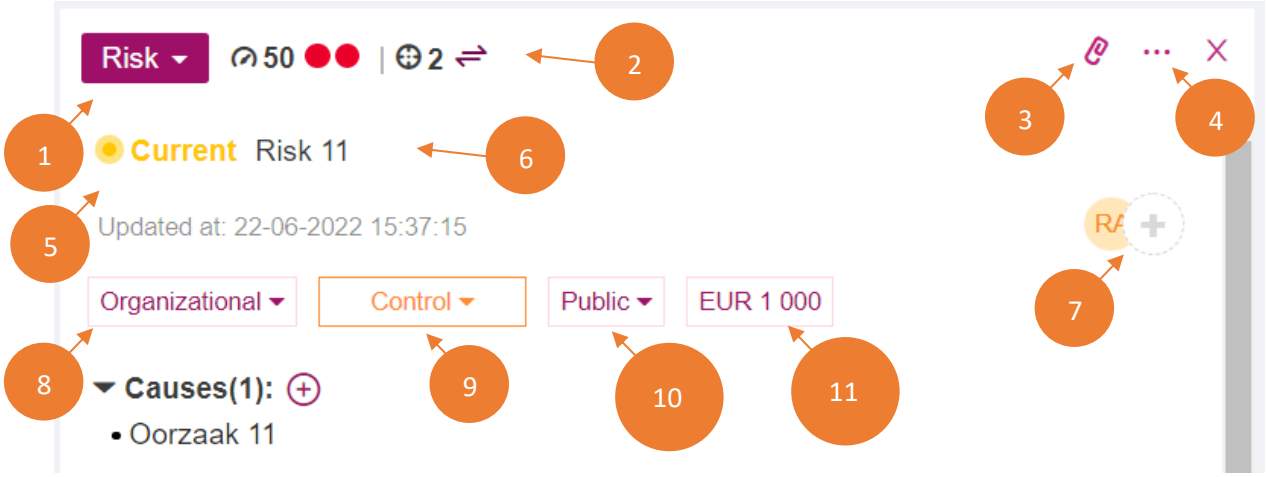
After logging in to your RISKID account, you will see *My Risks* in the left menu. Here you will find an overview of all risks, across all your involved projects, of which you are the risk owner. So, you have an overview of all your risks together and that makes managing your risks a lot easier and clearer.

As soon as you click on a risk in your risk overview, a right framework will appear (View and edit risks). In this menu you can adjust your risk:

- Adding measures to a risk
- Edit risk score

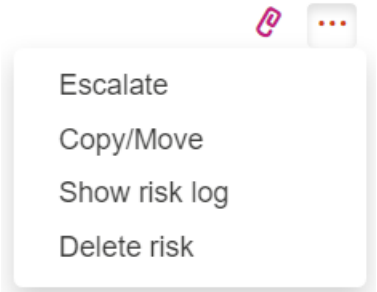
You can also filter the risk list by different parameters (Filtering risks).

View and edit risks

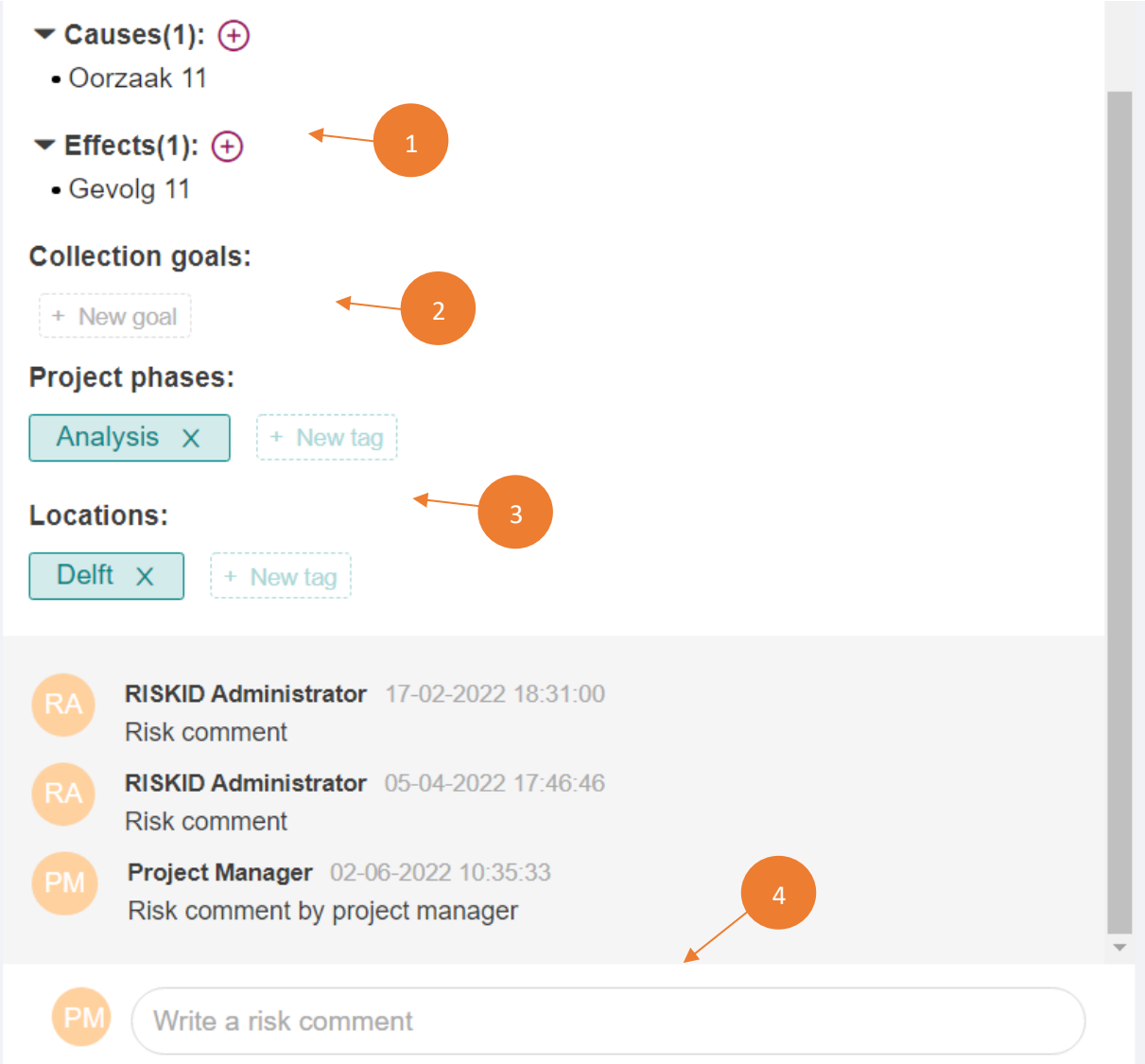


As soon as you have added a risk to the project risk list, or clicked on a risk, a detailed view of the risk appears. In the right frame, you can see details of the risk and make changes if necessary.

1. Click here to add measures to the risk (Add measures to risk) or to add or change a risk score (Edit risk score).
2. Here you can see the current and target risk score.
3. MODULE: Click here to add a file or see which files have already been added.
4. Click here for additional options

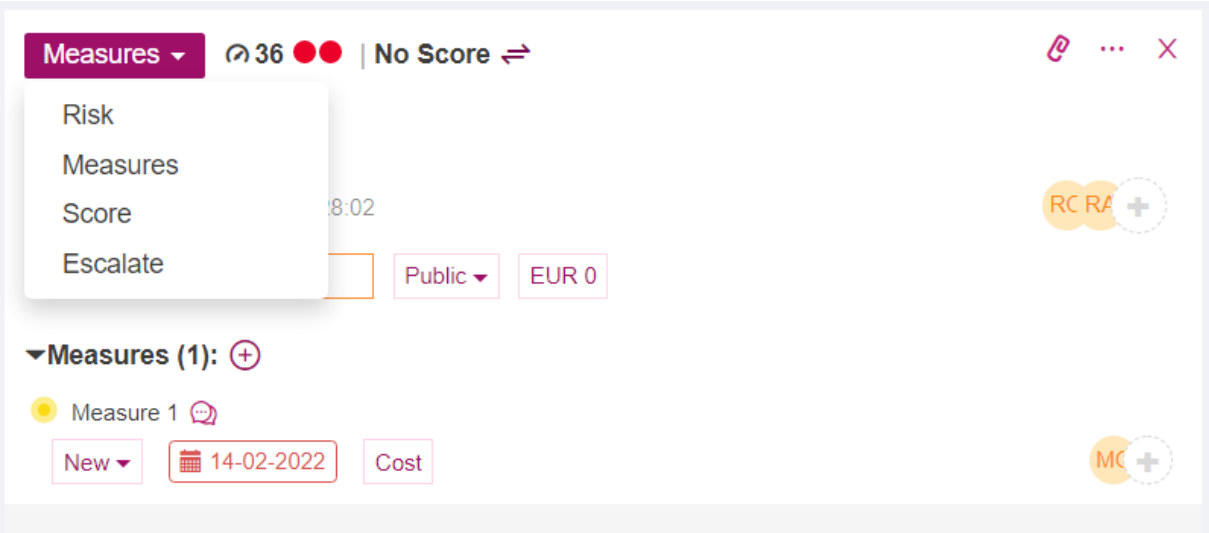


   a. Escalate into a strategic project.
   b. Copying/moving a risk.
   c. View risk log.
   d. Remove risk.
5. Click here to determine the status of your risk. (e.g., *New*, *Current*, *Complete*)
6. Click on the risk description to adjust it.
7. Click here to link a risk owner to the risk. (To add team members, click +). When you hover your cursor over a risk owner, you can remove it  .
8. Click here to link a category to your risk.
9. Here you can choose the desired mitigation strategy.
10. Determine here whether the risk is public or private.
11. Here you can see the risk costs or when using quantification, the expected costs and delay.

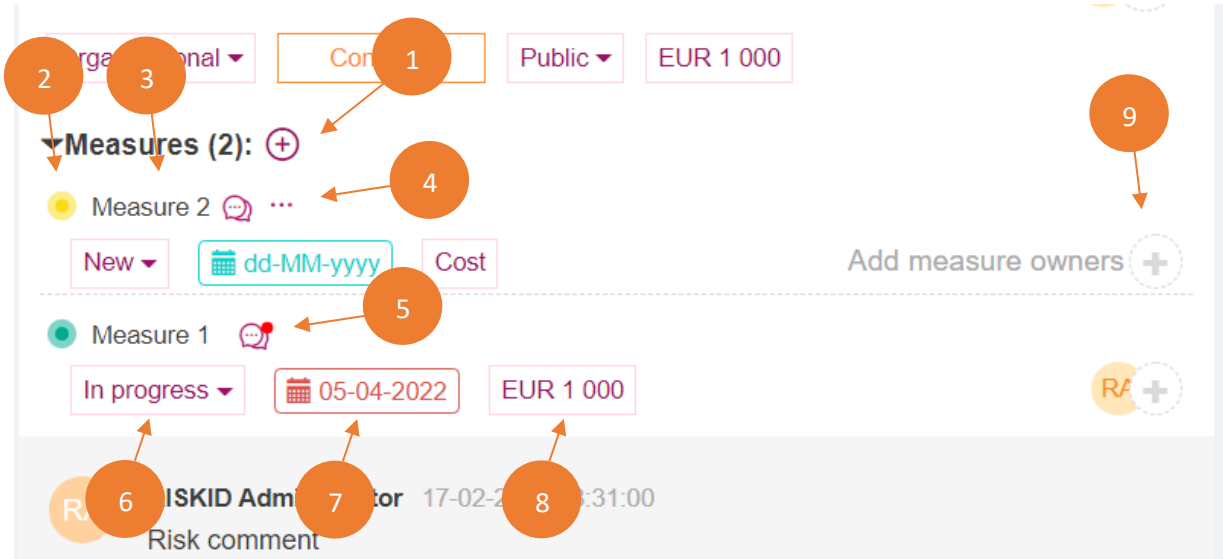


1. Here you can enrich your risk with possible causes and consequences.
2. Here you can link objectives to risks.
3. Here you can tag your risk.
4. Type your risk note here.

Adding measures to a risk



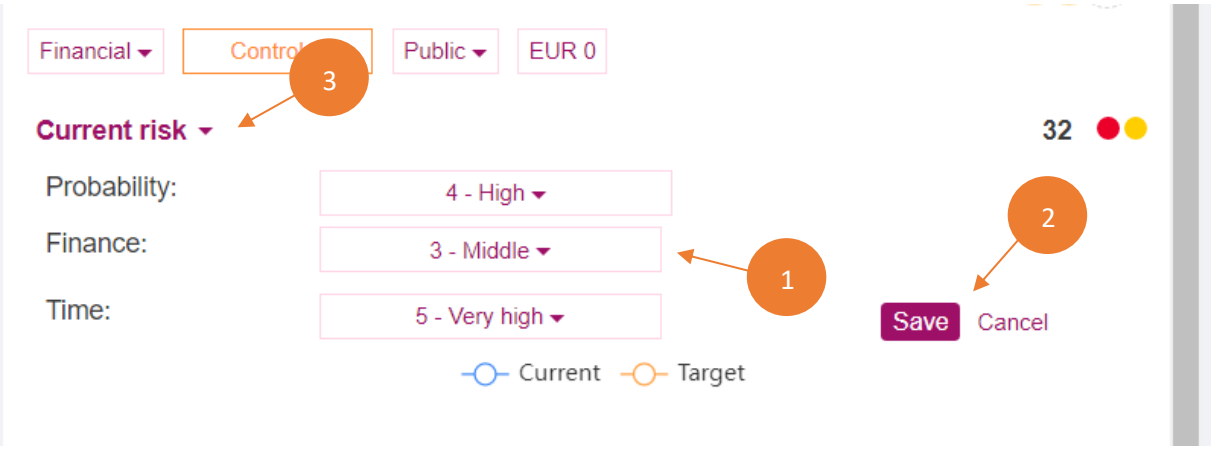
By pressing *Measures* in the detail view of the risk, you can edit the existing measures and add new measures to the risk.



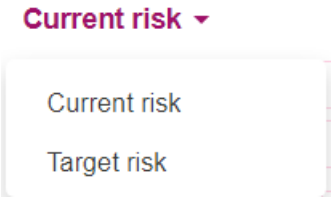
1. Here you can click to add a new measure to the risk.
2. Indicate whether a measure has a preventive or corrective effect.
3. Here you can see the added measure or adjust existing measure description.
4. Click here to remove a measure ⋯ .
5. Add a comment to the measure or view current comments .
6. Click here to change the status of your measures (e.g.: *New*, *In progress*, *Done*).
7. Here you can set an end date for when the measures must be implemented. (RISKID automatically sends a reminder to the action holder and risk owner at two times: 1. two weeks before the end date and 2. as soon as the deadline has expired).
8. Here you can add or change the measure costs.
9. Here you assign an action holder to the measure. You can assign multiple action holders to a measure. When you hover your cursor over a measure owner, you can delete it .

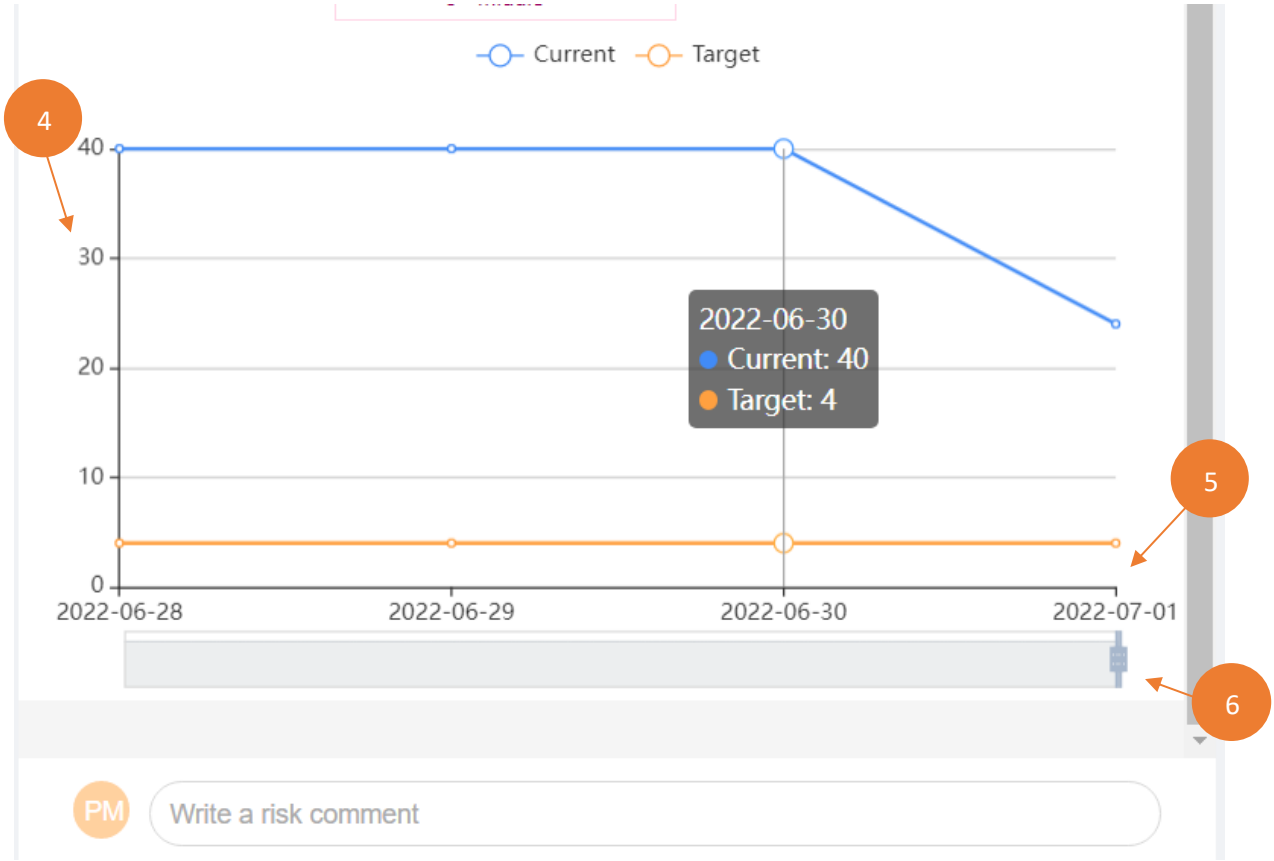
Edit risk score

By pressing *Score* in the risk detail view, you can edit the risk score.



1. Click here to determine your score for the probability and impact for the risk in the drop-down menu.
2. Once you have determined the score for both the probability of occurrence and the impact(s) for the risk, click the *Save* button to save the new score. (*Please note, you can only save when all values are filled in*)
3. Click on rest risk to fill in or change the rest risk.

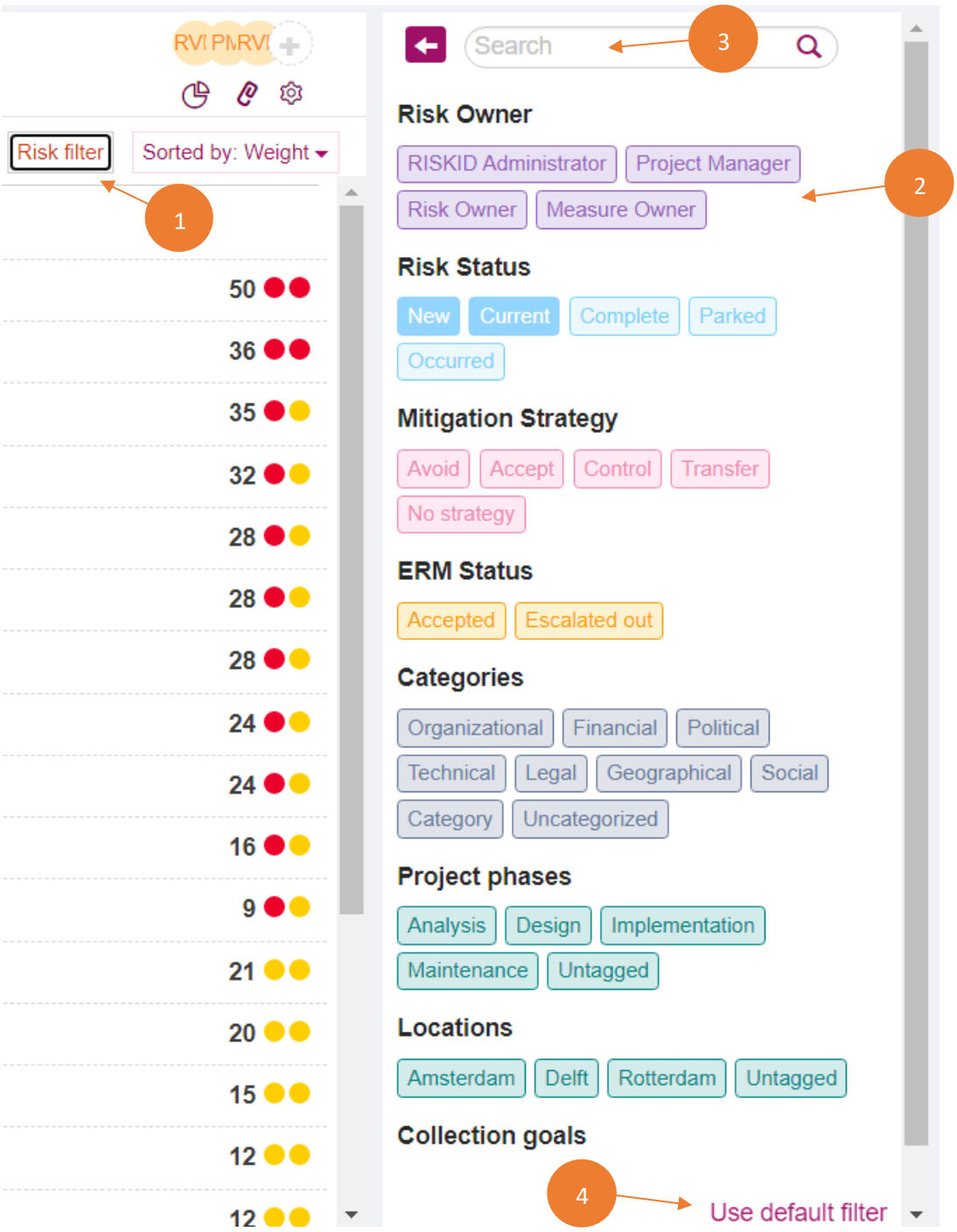




Here you can see the trend line of the (residual) risk score:

4. The vertical axis indicates the risk score.
5. The horizontal axis indicates the date.
6. By sliding with the bars, you can set which period you want to show.

Filter risks



In RISKID you can easily draw up a list of risks that you want to have by means of our risk filter. This filter can be set based on a risk status, category or tags. Our filter works as follows. A risk can only have 1 status, so when you filter by risk status and you choose multiple statuses, you will see the risks in the list with status 1 OR status 2. This OR operator works the same when you filter by categories. It is different when you filter by tags. If you choose multiple tags within a tag collection to filter, you will get a list of risks with tag 1 AND tag 2. So, within tag collections there is filtering with an AND operator. The system also uses an AND operator when filtering with tags from different collections, categories or statuses.

1. Click here to open the risk filter
2. Click here to filter your risks. You can filter by the following variables:
    a. Risk owner
    b. Risk status

c. Mitigation strategy
d. Categories
e. Tags

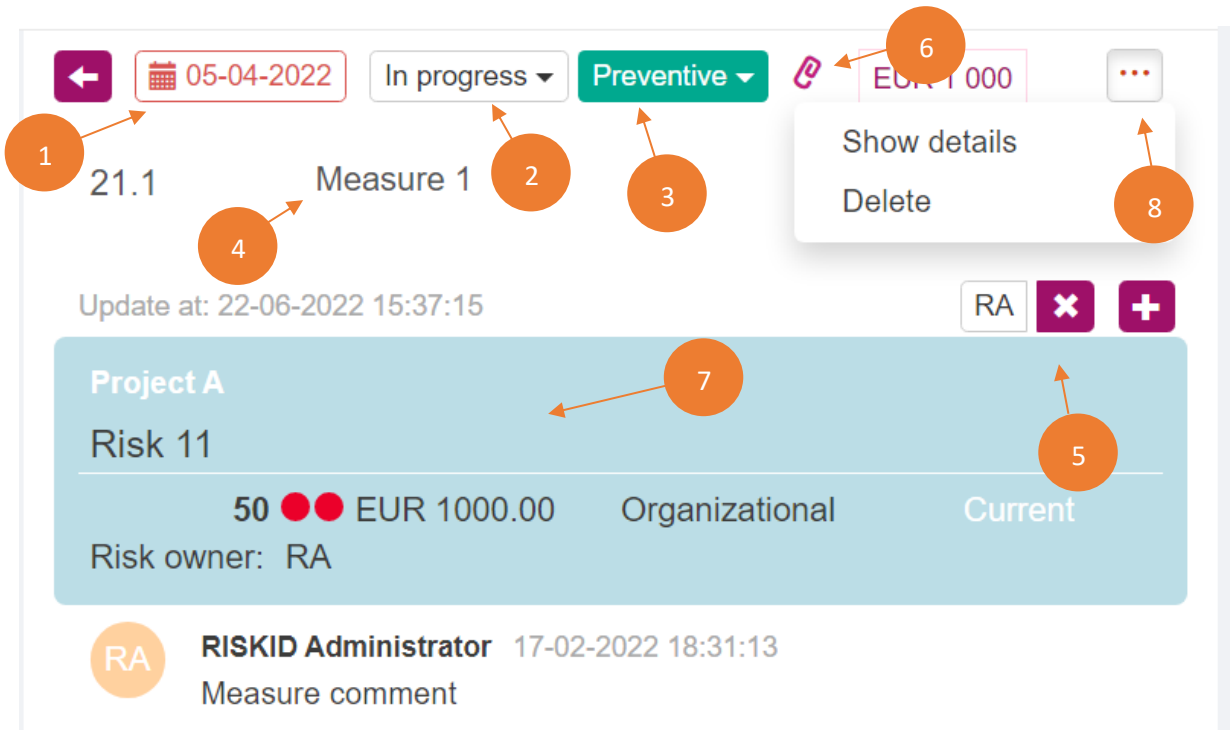
3. Here you can search for specific categories, tags or statuses.
4. By default, risks are filtered by *New* and *Current*. Additional filters can be added to the risk filter. Click *Reset Filter* to return to the default setting, *New* and *Current*.

My measures

In the left menu you will see *My Measures*. Here you will find an overview of all measures, across all your projects involved, of which you are the action holder. So, you have an overview of all your measures or actions together and that makes managing your actions a lot easier and clearer.

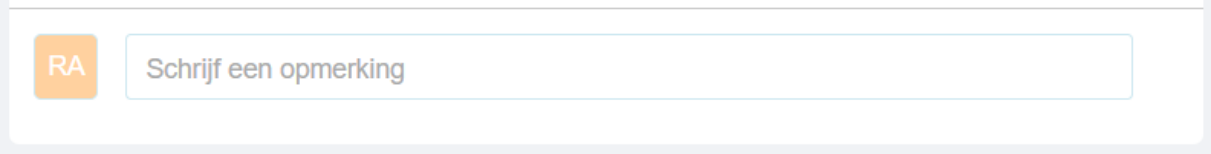
In the measure list you can manage the measures within the project. This way you can easily see which measures are over the deadline and what their status are. The list is automatically filtered by measures that are *New*, *In progress*, or *Continuous*. In addition, only the measures of risks that are *New* and *Current* are shown.

1. Here you can see all the measures in the project, click on a measure to see the detailed data.
2. This is the risk to which the measures belong.
3. Here you can see what the deadline of a measure is. The colour pointer shows the status of the measure relative to the deadline.
    a. Turquoise: a measure that is not *Done* and whose current date is more than 2 weeks before the deadline.
    b. Orange: a measure that is not *Done* and whose current date is within two weeks before the deadline.
    c. Green: a measure that is *Done*.
    d. Red: measures over the deadline.
4. Here you can see the action holders of a measure ME. When you move the cursor over the initials of an action holder, the full name is shown.
5. Here the measure type is shown.
6. Click here to open the window to filter the list of measures. You can filter the measures by measure owner, measure status and risk status.
7. Here you can sort the measures based on the selected criteria in the drop-down menu.

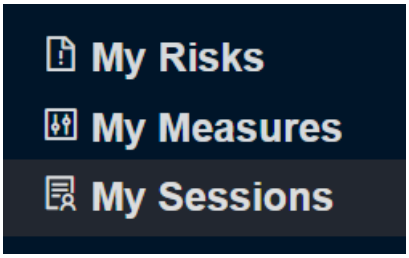


1. Click here to change the deadline of the measure.
2. Click here to change the status of the measure.
3. Click here to change the measure type.
4. Here you can see the description of the measure.
5. Click here to change or add an action holder.
6. MODULE: Click here to add a file to the measure.
7. Here you can see to which risk the measure is linked.
8. Click ··· to:
   - to view more information about the risk *(Show details)*.
   - to remove the measure.

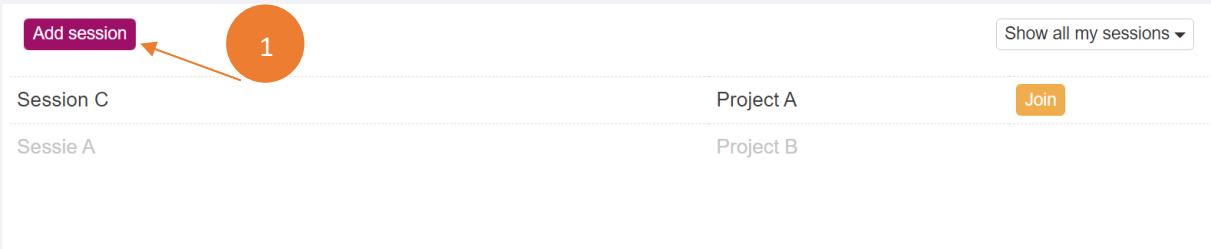
At the bottom right of the right frame, you will see a comment field. Here you can, for example, record the progress and details related to the measure.



My sessions



In the left menu you can find *My Sessions*. You will find all the sessions for which you have been invited.



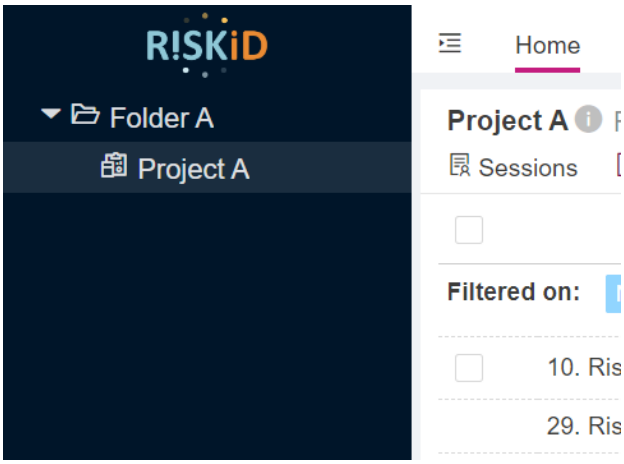
1. Click here if you want to add a session to which you have been invited to your overview. You will then be asked to enter the session code that you received with the invitation. The session is then added to the list. You can then join your sessions at any time by logging in and clicking *Join*.

Facilitator

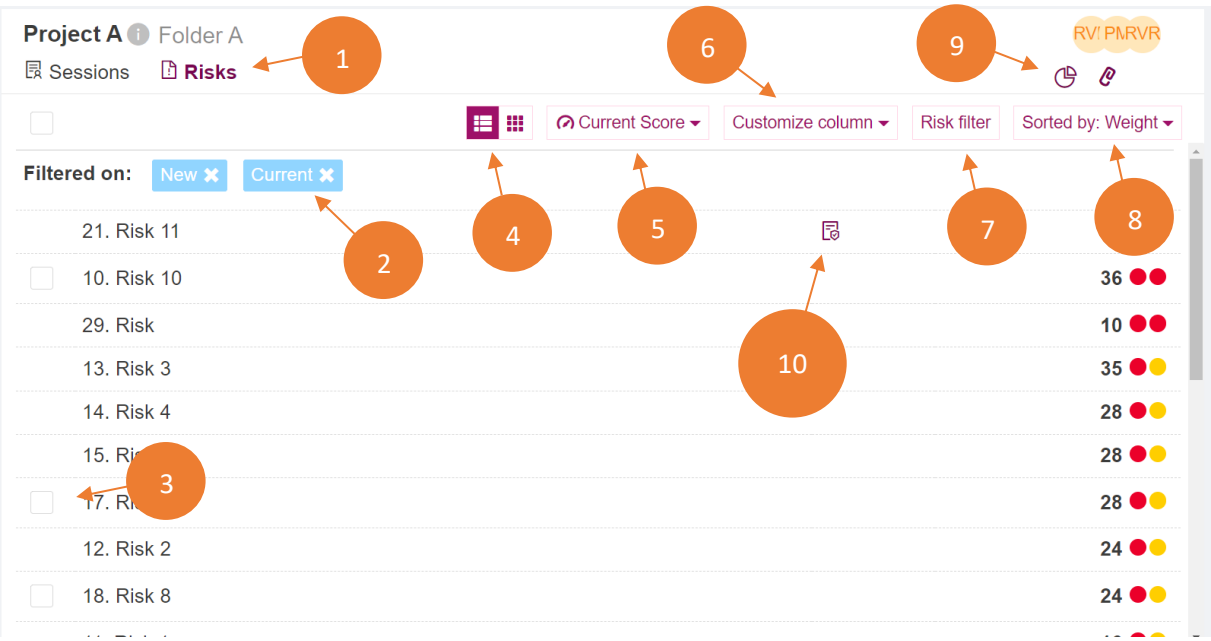
As a facilitator of a session, you can also easily get to your session via My Session. From here you can create or enter a session by clicking *Continue*. Go to Session overview for more information about customizing a session.

View project as a Team Member

When you have been added to a project as a team member, the project manager has given you certain rights which risks you can view.



When you log in to RISKID you will find all projects in the top left of which you are a team member. Click a project and then open it.



1. When you press *Risks* in your project menu, you will see the project risk list. This is where all the risks of the project are located. By clicking on a risk, you can see more detailed data of the risk, such as: causes, consequences, risk status, risk owner, measures, etc.
2. Risks are automatically filtered by *New* and *Current* status. This way you immediately see the most important risks.
3. Risk with a checkbox ☐ are your own risks that you can edit (Edit Risks). You may only read the risks without a checkbox (View risks).
4. Click here to switch between the risk list and the risk matrix.
5. Click here to switch between showing the *Current Risk Score* or the *Target Risk Score*.
6. Click here to add an additional column to the risk list. This column can contain information about the tags, categories or risk owner.
7. Click here to open your risk filter to filter risks based on categories, status or tags.
8. Click here to sort your risks by different values, such as: risk score (per probability or impact), weight (standard), risk description or risk index.

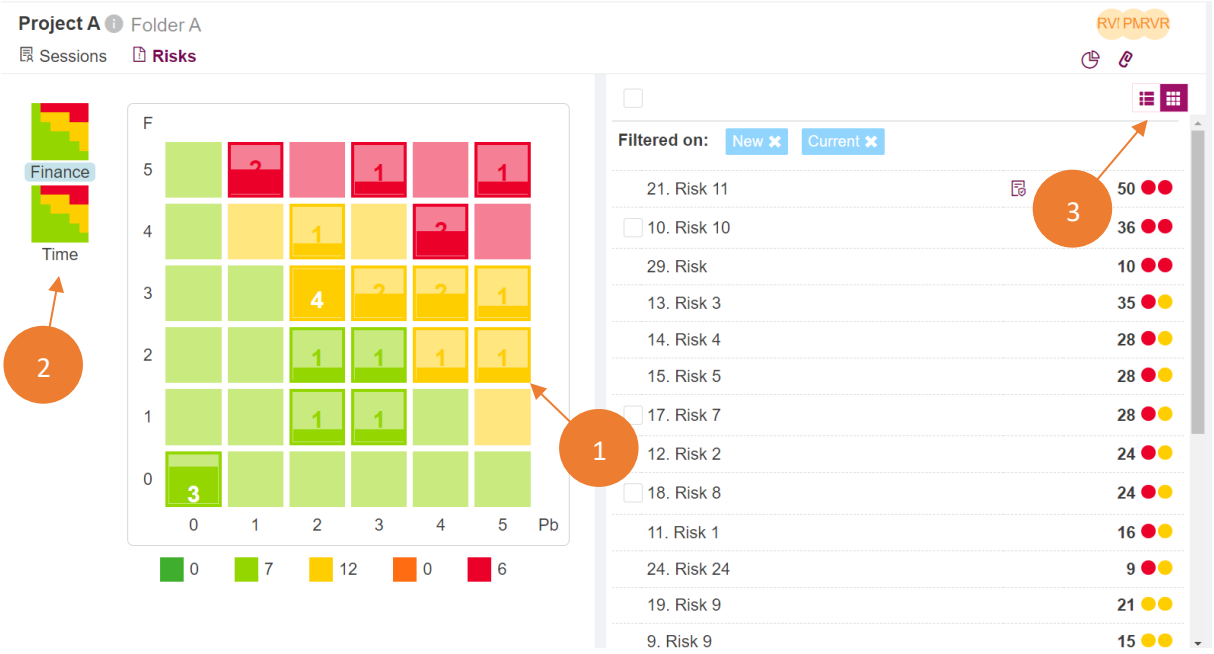
9. Click here to view the Project dashboard.
10. Risks can be marked as public or private. When a risk is marked as private, an icon appears behind the risk . Only project managers and team members who are allowed to see all risks see these risks appear in the project risk list.

Risks in the list that have been made slightly grey are risks that are currently in a session. These risks cannot be clicked on. A facilitator has therefore created a new session with a number of existing risks from the project risk list.

In the project risk list, there are a number of options that you can use to edit the risks and other risk data.

- Edit risks
- View risks
- Filter risks
- Selecting risks
- Edit multiple risks at once
- Copy/move risks
- Project dashboard

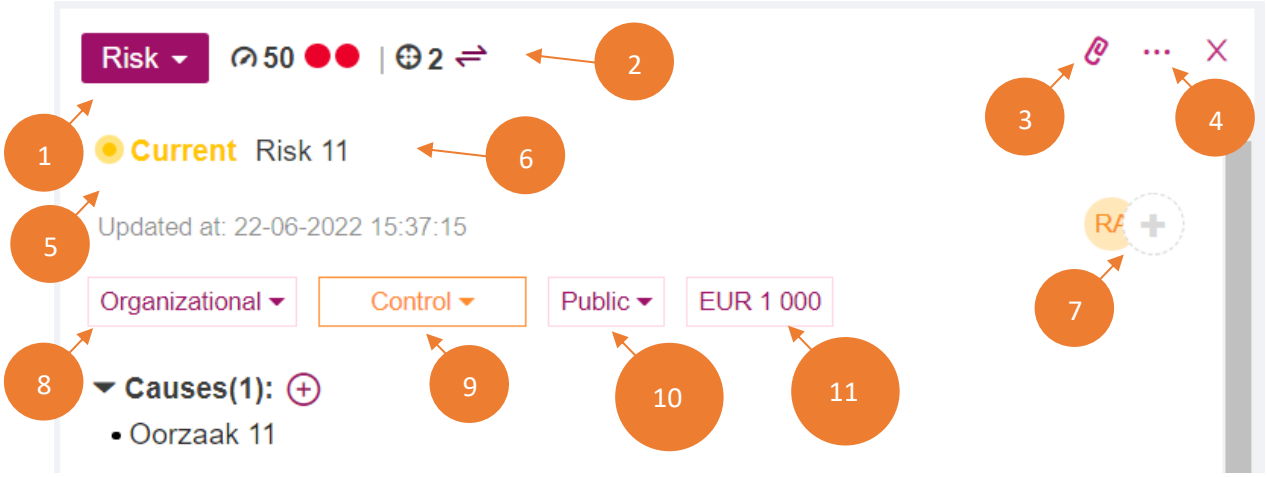
Risk matrix



Here you can see the matrix of the project. The matrix is divided into boxes with the probability of the horizontal axis and the impact on the vertical axis. Each box indicates the weight in colours from green (low risks) to red (critical risks). The box indicates how many risks fall into this category. The extent to which the box is filled dark indicates how many risks fall into the course in relation to the rest of the project.

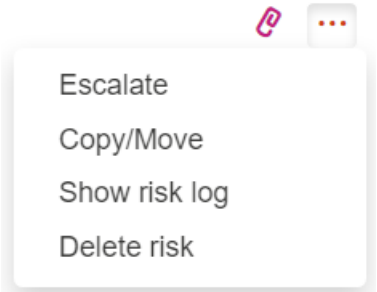
1. Click on a box or a colour at the bottom of the matrix to show the risks. The risks you select are filtered on the right side of the list.
2. Click here to switch matrix between the different impact classes.
3. Click here to go back to the risk overview.

Edit risks

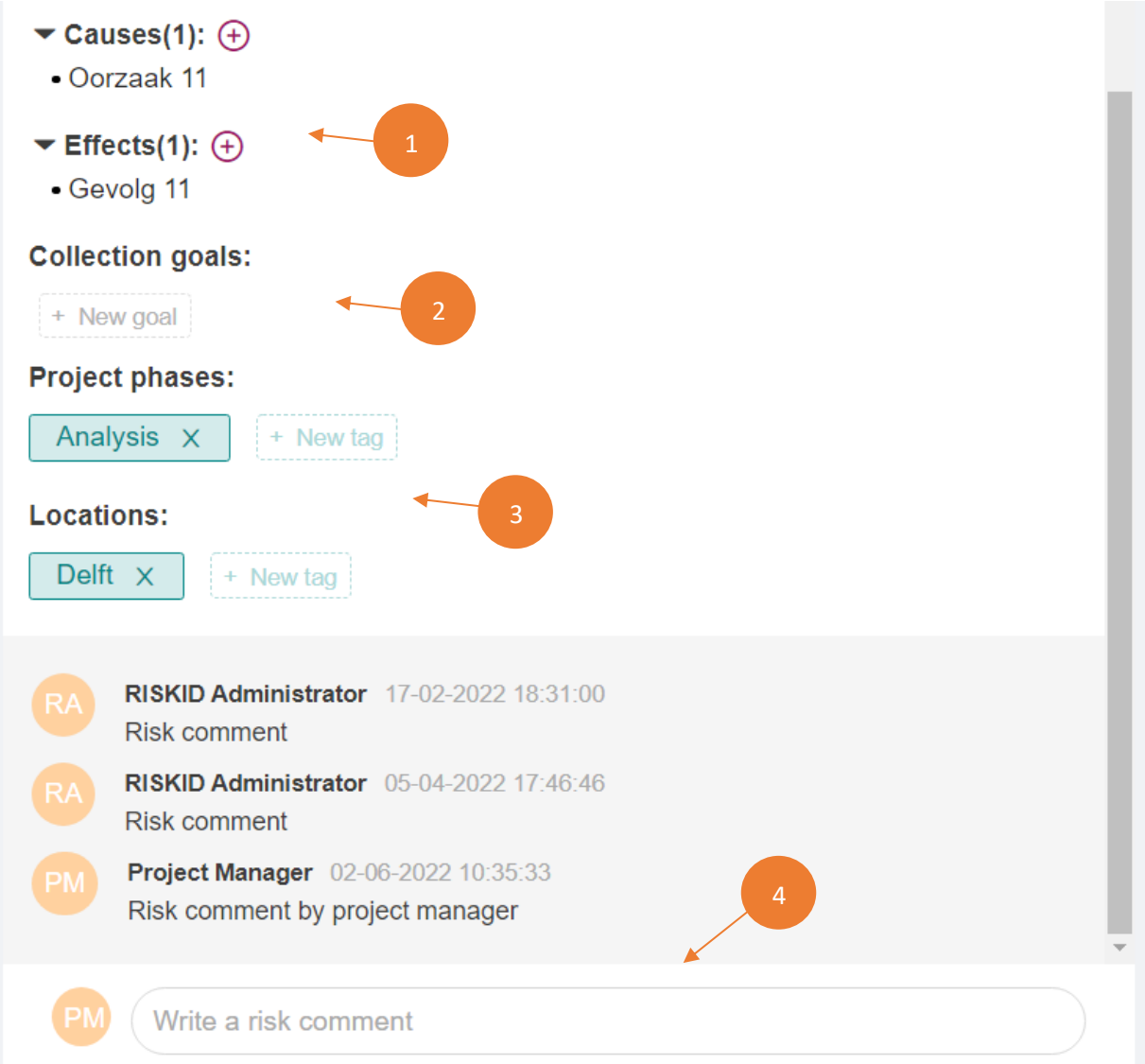


As soon as you have added a risk to the project risk list, or clicked on a risk, a detailed view of the risk appears. In the right frame, you can see details of the risk and make changes if necessary.

1. Click here to add measures to the risk (Add measures to risk) or to add or change a risk score (Edit risk score).
2. Here you can see the current and target risk score.
3. MODULE: Click here to add a file or see which files have already been added.
4. Click here for additional options

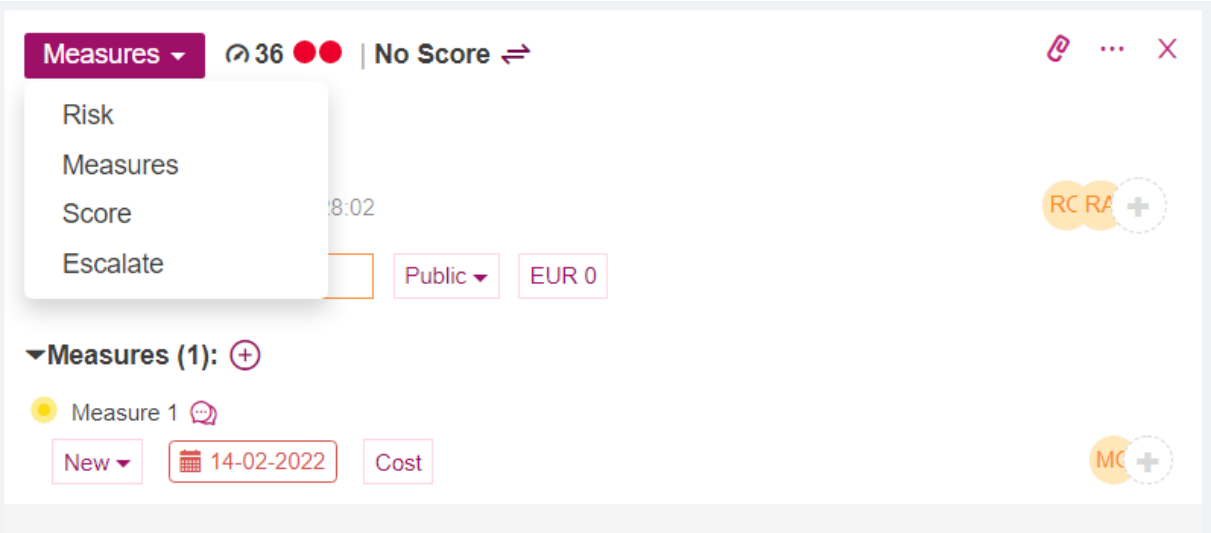


   a. Escalate into a strategic project.
   b. Copying/moving a risk.
   c. View risk log.
   d. Remove risk.
5. Click here to determine the status of your risk. (e.g., *New*, *Current*, *Complete*)
6. Click on the risk description to adjust it.
7. Click here to link a risk owner to the risk. When you hover your cursor over a risk owner, you can remove it  .
8. Click here to link a category to your risk.
9. Here you can choose the desired mitigation strategy.
10. Determine here whether the risk is public or private. When a risk is marked as private, an icon appears behind the risk. Only project managers and team members who are allowed to see all risks see these risks appear in the project risk list.
11. Here you can see the risk costs or when using quantification, the expected costs and delay.

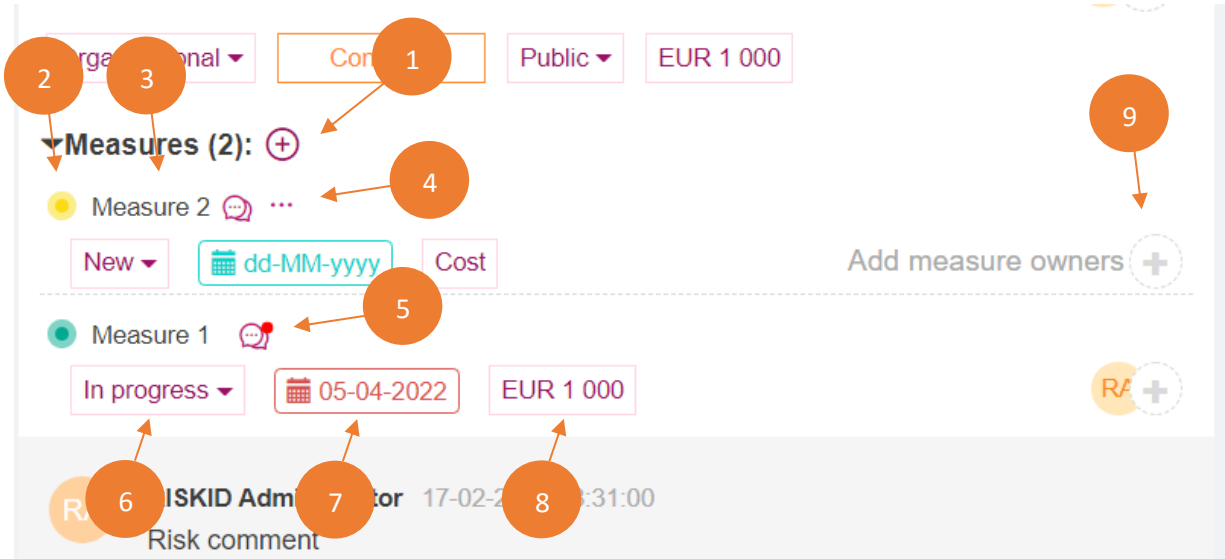


1. Here you can enrich your risk with possible causes and consequences.
2. Here you can link objectives to risks.
3. Here you can tag your risk.
4. Type your risk note here.

Adding measures to risk



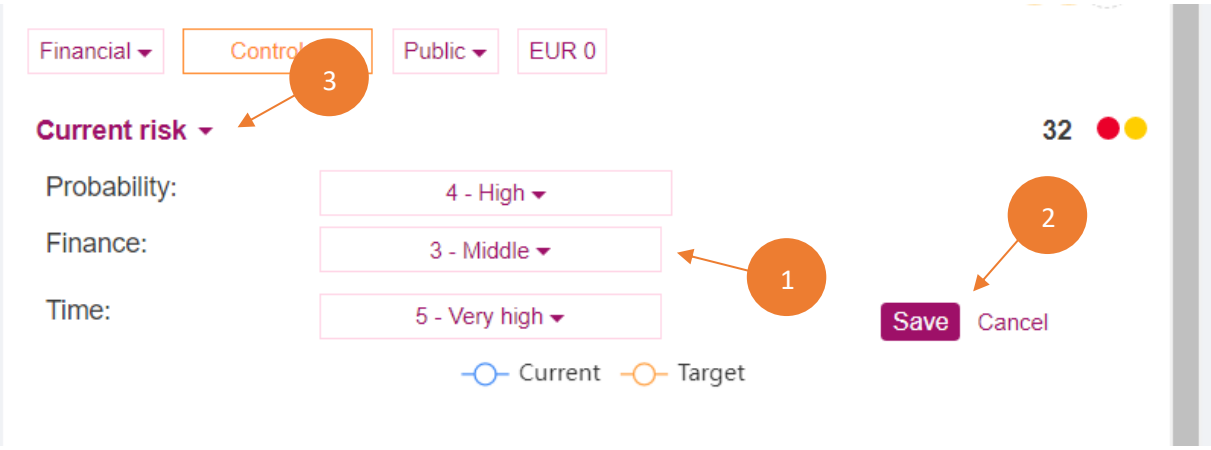
By pressing *Measures* in the detail view of the risk, you can edit the existing measures and add new measures to the risk.



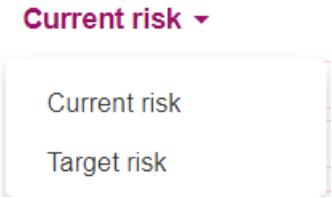
1. Here you can click to add a new measure to the risk.
2. Indicate whether a measure has a preventive or corrective effect.
3. Here you can see the added measure or adjust existing measure description.
4. Click here to remove a measure ⋯ .
5. Add a comment to the measure or view current comments .
6. Click here to change the status of your measures (e.g.: *New*, *In progress*, *Parked*).
7. Here you can set an end date for when the measures must be implemented. (RISKID automatically sends a reminder to the action holder and risk owner at two times: 1. two weeks before the end date and 2. as soon as the deadline has expired).
8. Here you can add or change the measure costs.
9. Here you assign an action holder to the measure. You can assign multiple action holders to a measure. When you hover your cursor over a measure owner, you can delete it .

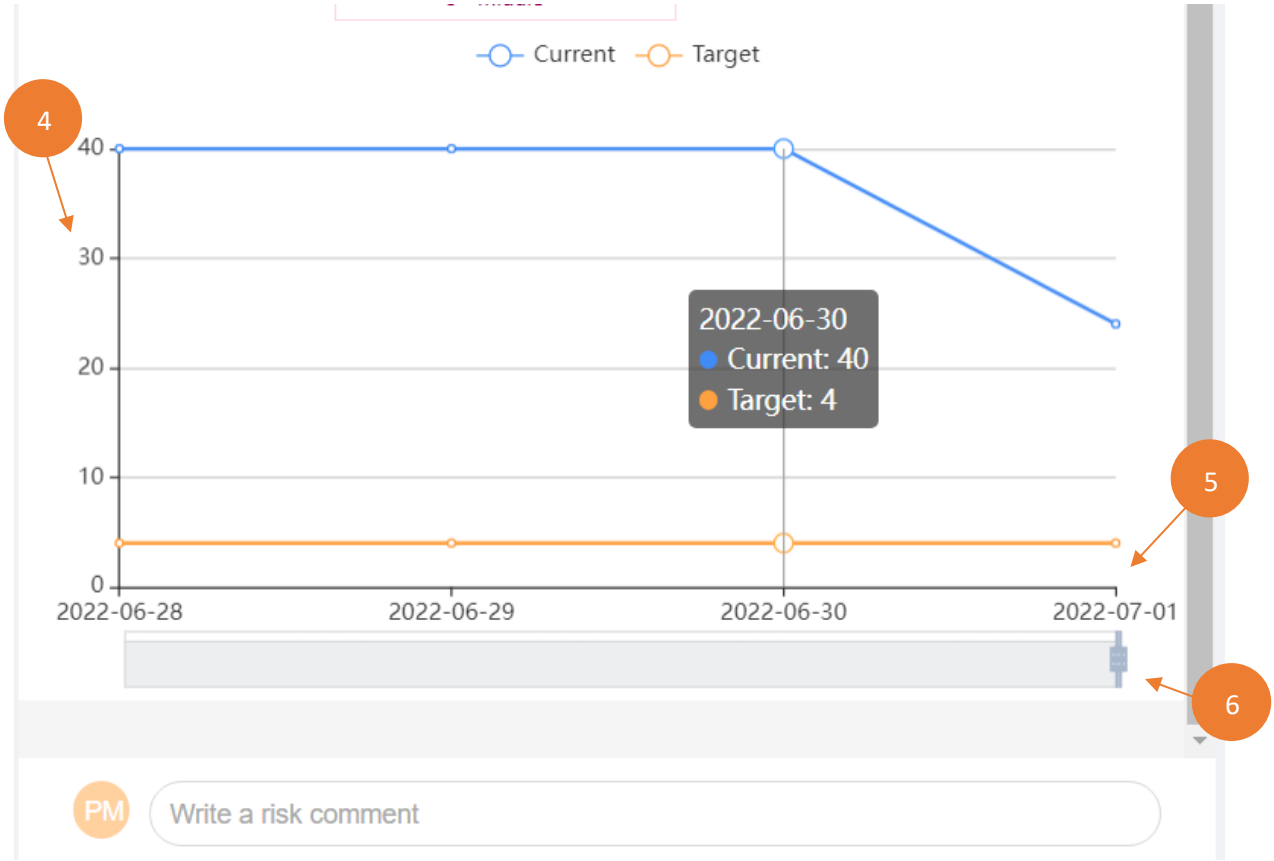
Edit risk score

By pressing *Score* in the risk detail view, you can edit the risk score.



1. Click here to determine your score for the probability and impact for the risk in the drop-down menu.
2. Once you have determined the score for both the probability of occurrence and the impact(s) for the risk, click the *Save* button to save the new score. (*Please note, you can only save when all values are filled in*)
3. Click on rest risk to fill in or change the rest risk.



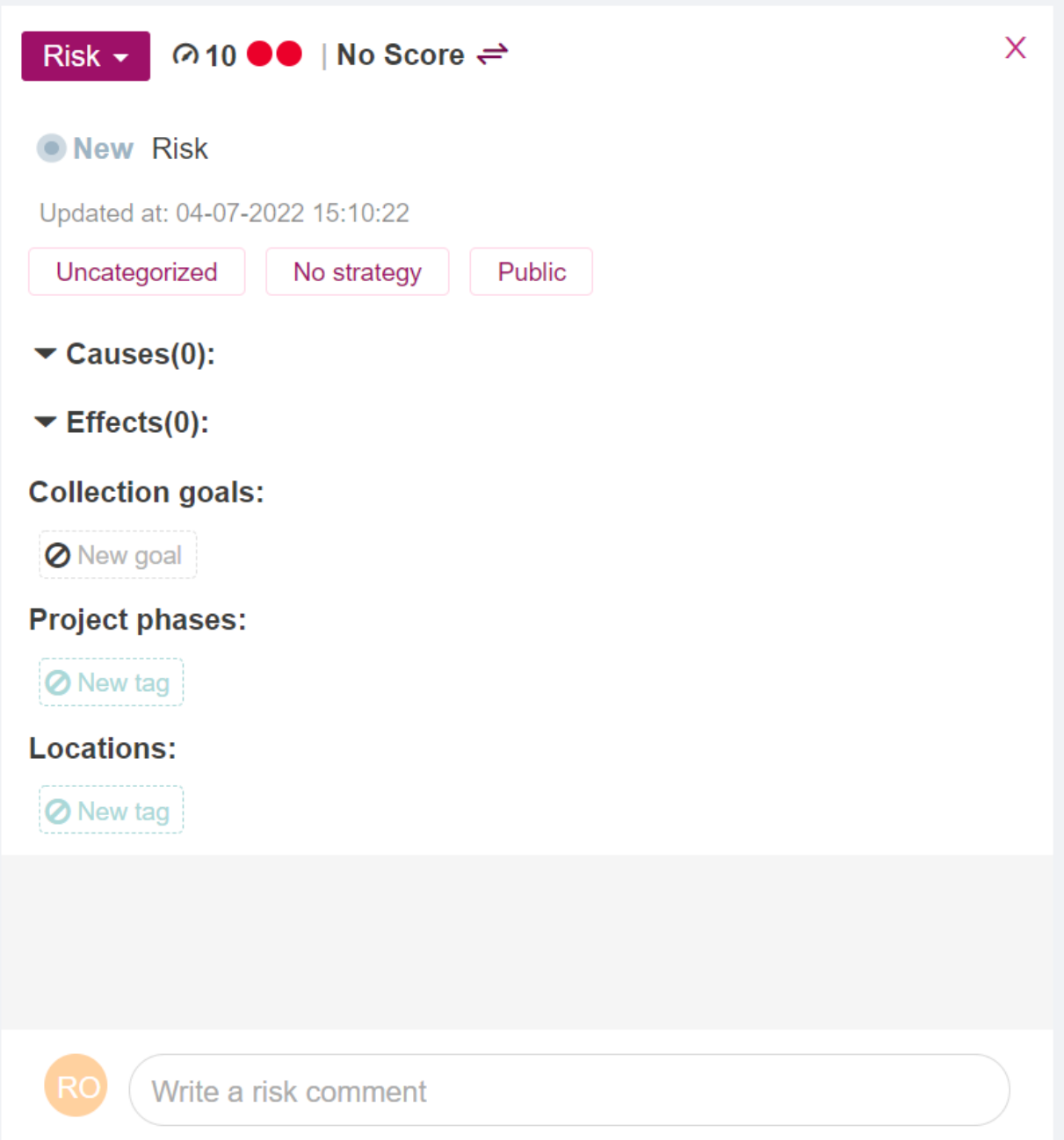


Here you can see the trend line of the (residual) risk score:

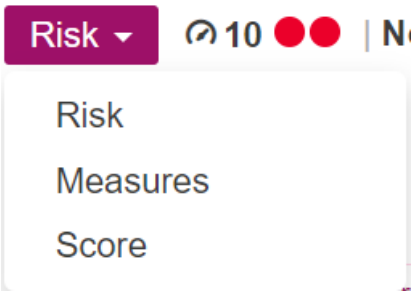
4. The vertical axis indicates the risk score.
5. The horizontal axis indicates the date.
6. By sliding with the bars, you can set which period you want to show.

View risks

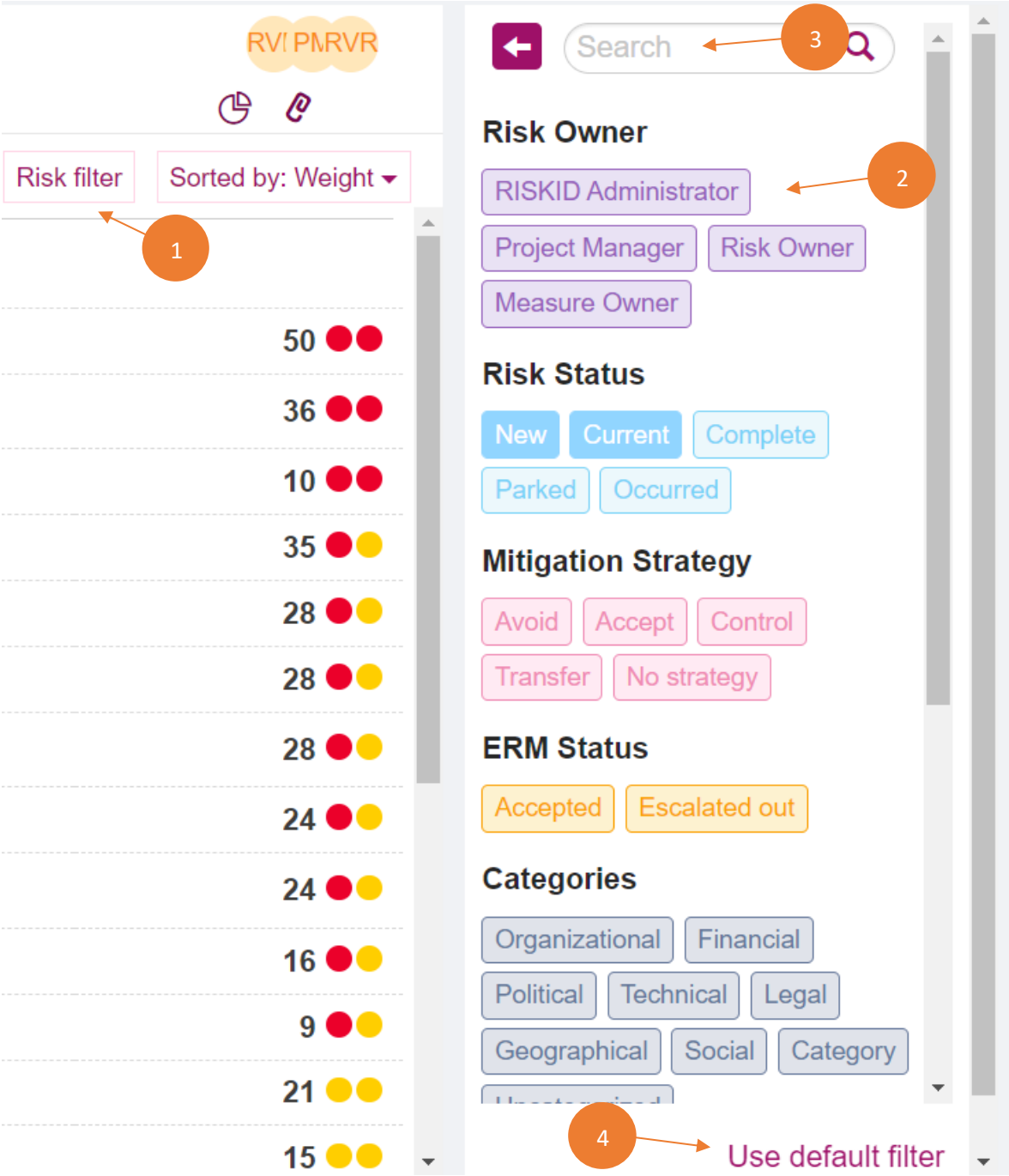
If you are a team member of a project, the project manager can give you reading rights for other risks within the project. You can then see and view the risk in the risk list, but not adjust it.



When you open a risk, you will see the risk detail screen with information such as the causes, consequences, category, etc. If you also want to view the measures and score, click on *Risk* in the top left. Then click on *Measures* or *Score* or view them.



Filter risks

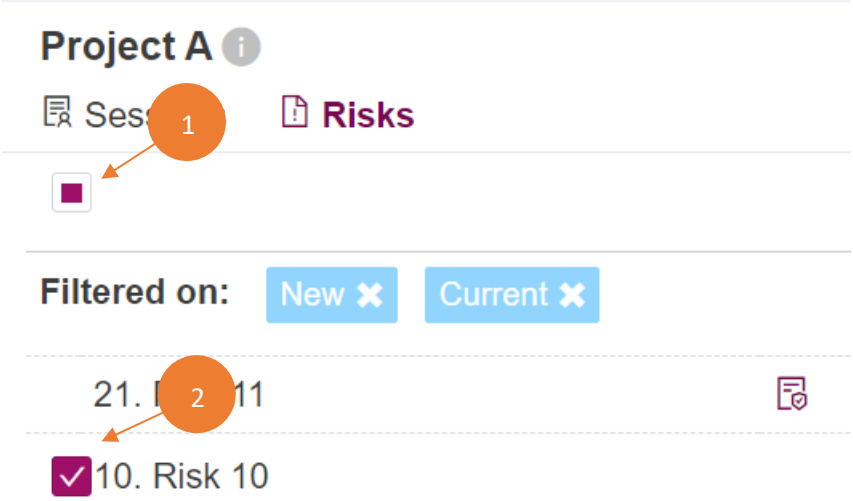


In RISKID you can easily draw up a list of risks that you want to have by means of our risk filter. This filter can be set based on a risk status, category or tags. Our filter works as follows. A risk can only have 1 status, so when you filter by risk status and you choose multiple statuses, you will see the risks in the list with status 1 OR status 2. This OR operator works the same when you filter by categories. It is different when you filter by tags. If you choose multiple tags within a tag collection to filter, you will get a list of risks with tag 1 AND tag 2. So, within tag collections there is filtering with an AND operator. The system also uses an AND operator when filtering with tags from different collections, categories or statuses.

1. Click here to open the risk filter
2. Click here to filter your risks. You can filter by the following variables:
    a. Risk owner
    b. Risk status
    c. Mitigation strategy

   d. Categories
   e. Tags
3. Here you can search for specific categories, tags or statuses.
4. By default, risks are filtered by New and Current. Additional filters can be added to the risk filter. Click on 'Reset filter' to return to the default setting, *New* and *Current*.

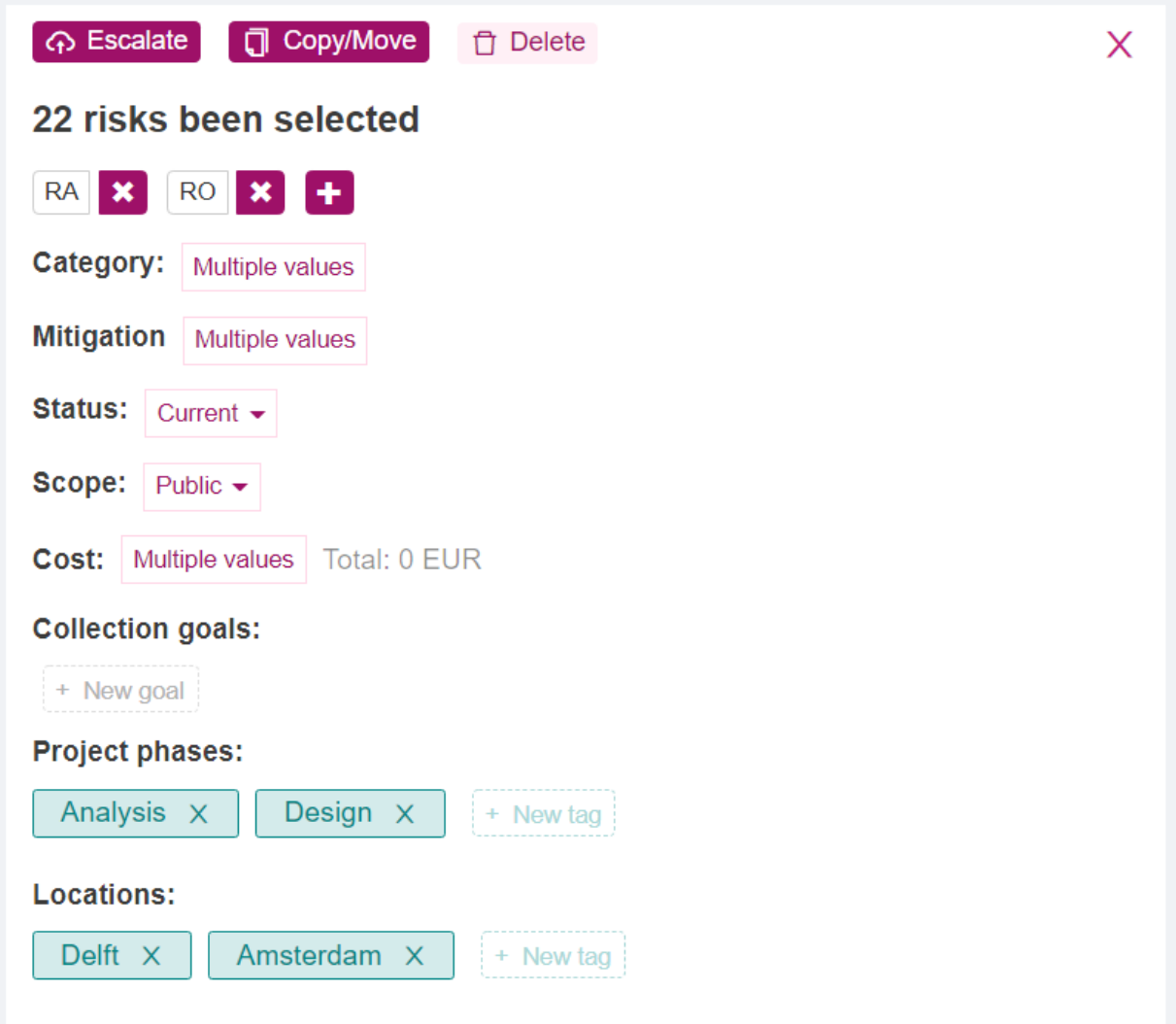
Selecting risks



It is possible to select risks individually or to select everything with a button. When the risks have been filtered through the risk filter, it is easy to select all these risks with a button. Selecting risks is important when editing multiple risks at once.

1. Click on the box at the top left to select all the risks shown (after filtering). When all risks are shown, the box looks like this .
2. Click on the boxes for each risk to select or deselect them individually.

Edit multiple risks at once



After selecting 2 or more risks, a screen will appear on the right with options to adjust the risks at once. When it says *Multiple values*, the risks have different values such as multiple categories or statuses. When changing any of these values, all selected risks change to those values.

Risk owners and tags

With risk owners and tags, there are several options possible. When an owner or tag is shown, it does not mean that all risks have this owner or tag, but that there is at least one risk that this owner or tag has. When you want to tag all selected risks with this owner or tag, you can add the owner or tag again via the ✚ or *+ New tag*.

Copy/move risks

In the risk detail screen, you can click on ••• to *Copy/Move*.

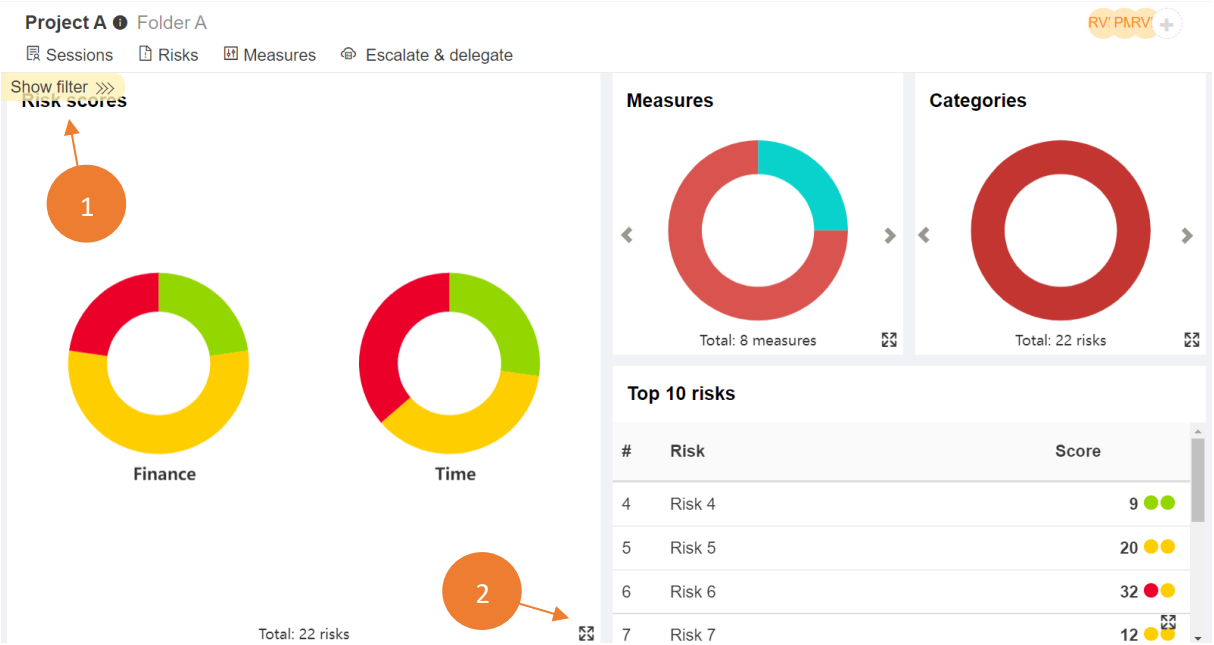
1. Here you can decide which project you want to move or copy the risks to. You can also copy risks to the current project.
2. Determine the risk name of the copy.
3. Select which data you want to take with you. When copying to another project, it is not possible to take all the information with you.

Project dashboard

Under a project you will see *Dashboard* or this icon at the top right of the project. This is the project dashboard and gives you a quick clear overview of the most important risk data of your project. Risk data that is shown is automatically filtered on the filters that are enabled in the risk list. Go to Filter risks for more information.

In your dashboard, you will see the following dashboard widgets:

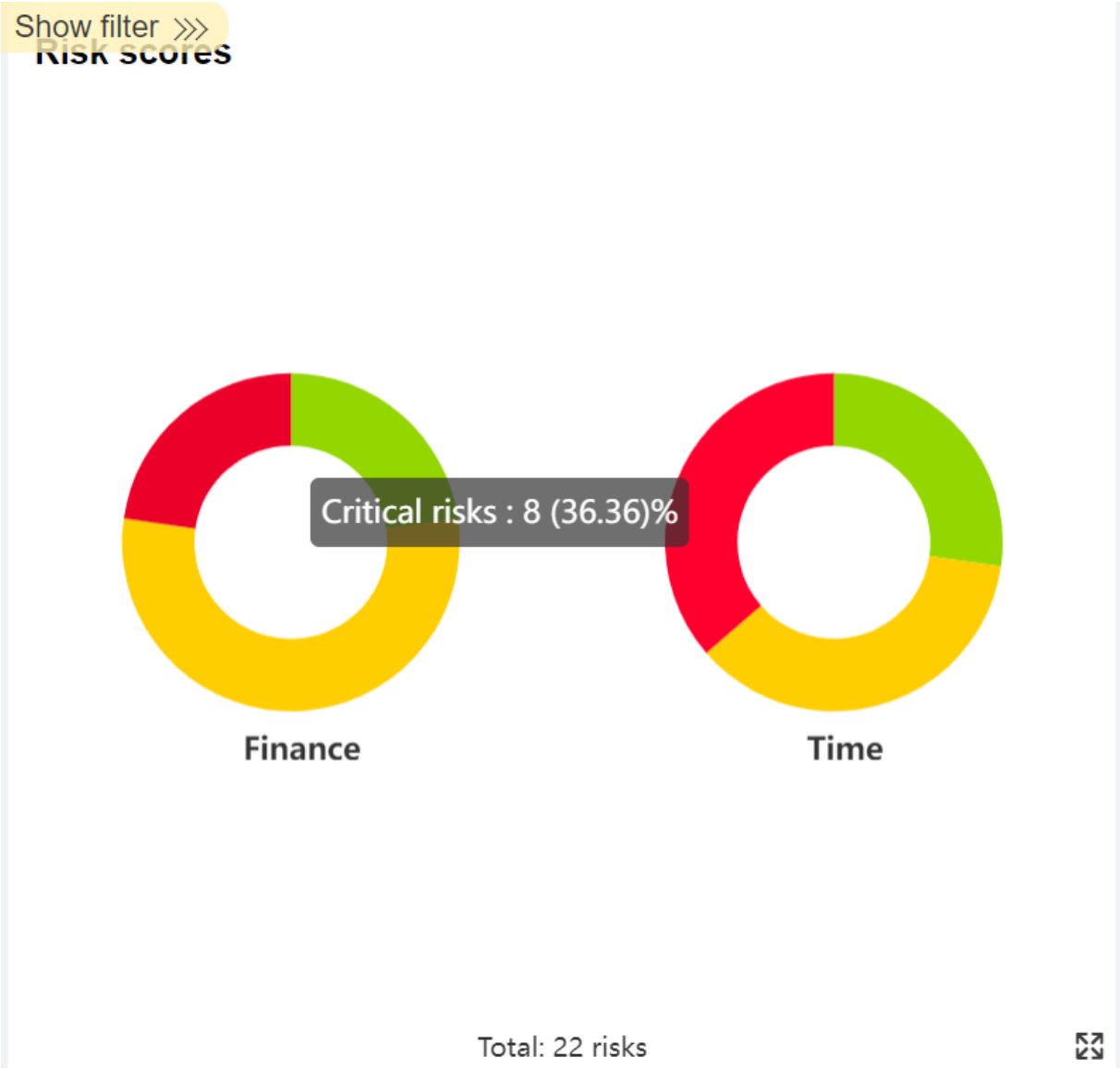
a. Risk scores
b. Measures (type)
c. Categories/costs
d. Top 10 risks



1. Click here to view or remove risk and measure filters.
2. Click to expand the widget to full screen.

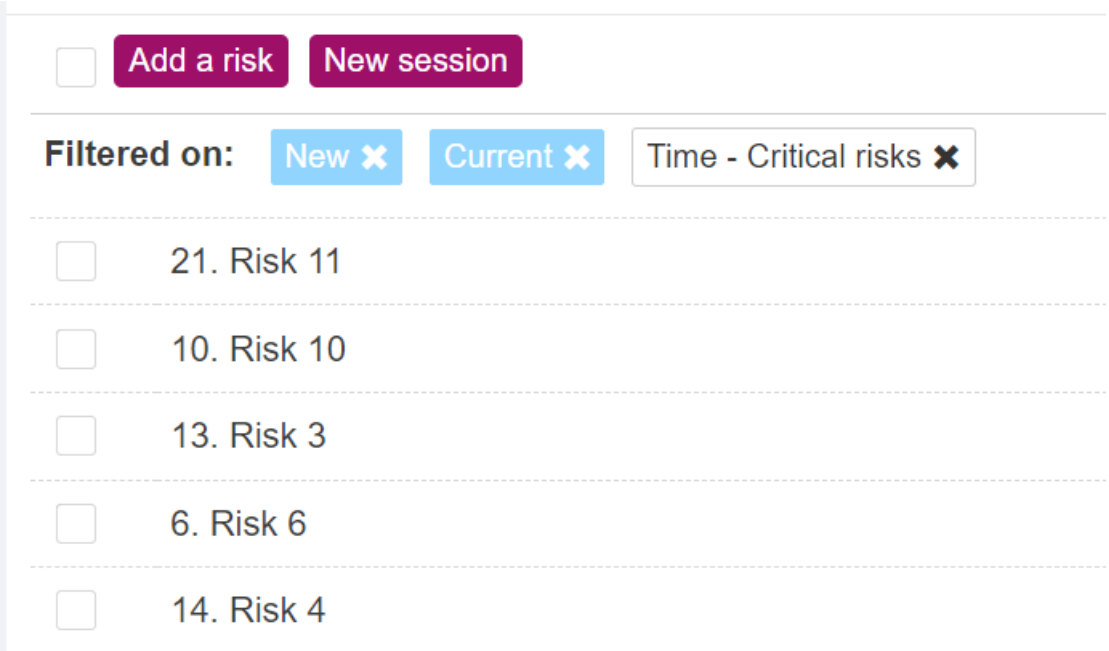
3. Click to download an image.

Risk scores



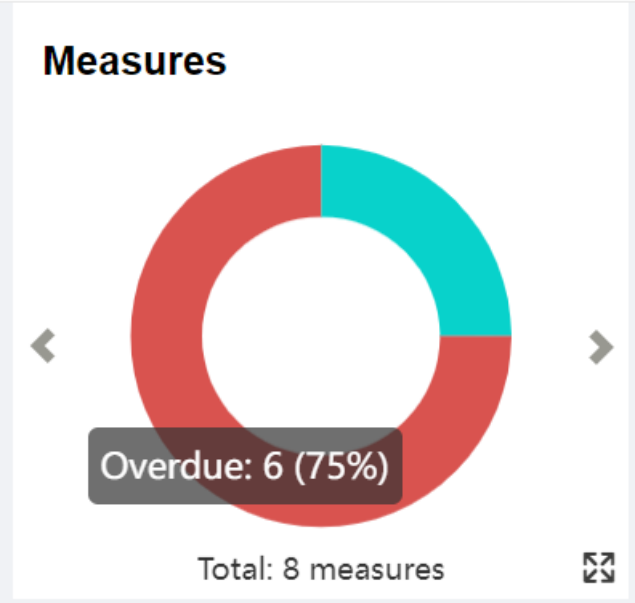
In the risk score widget, you will find an overview of the risk score and how these are distributed over the impact classes within your project.

Furthermore, below the circle diagrams you can see the total number of risks that are shown. In the diagrams, only risks with a score are shown, which is why this number may differ from the total number of risks in the project.



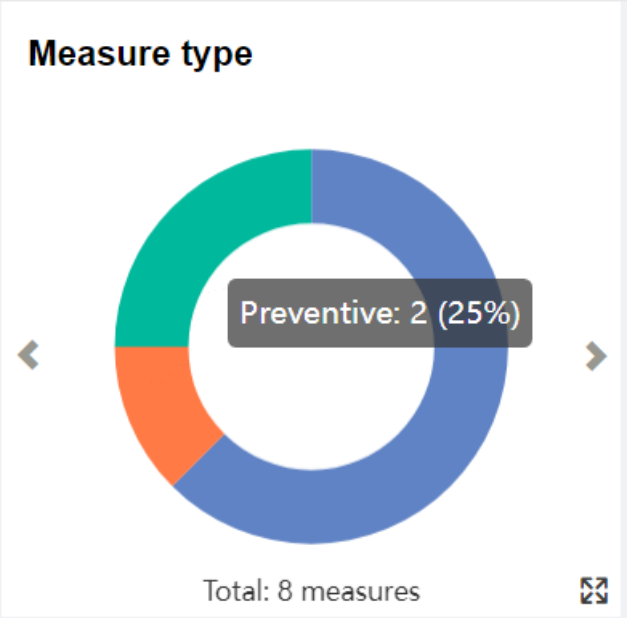
The uniqueness of our dashboards is that you can click through them to go to the detailed data. This way you can directly click on the red area of the *Finance* pie chart. You will then end up in the project risk list in which, with a filter, you only see the red money risks. Once in the risk list, you can zoom in further into the specific risks that you want to screen.

Measures (type)



In the measures widget you can see all measures incl. the status in the project. This way you can see briefly how things are going with the control of your project. How many measures are over their deadline? How many measures are approaching their deadline (2 weeks before the deadline date)?

You can also click through this widget to go to the desired detailed information. As soon as you click on one of the colour discs you will be redirected to the measures in the project filtered by the chosen measure status.

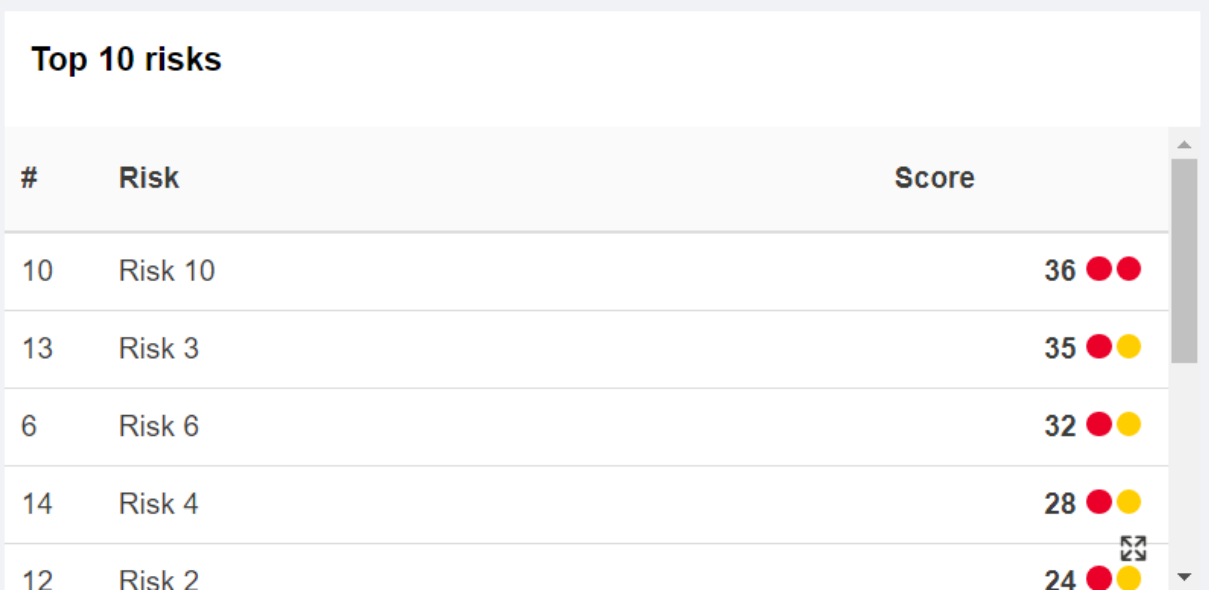


In addition to the measure status, it is also possible to see the distribution of measure type by clicking on ›. Measure types are divided into preventive, corrective and general.

Categories/costs

In the categories widget you can see how the project risks are divided into the different categories. Here you can see, for example, the risks divided into the 7 RISMAN glasses. If you click on one of the colour discs, you will be redirected to your project risk list filtered by the risks of that category. You can set the categories yourself as desired in your project.

Top 10 risks



The latest dashboard widget shows the top 10 risks within the project. This selection is made based on the risk weight. This means that we look at the risk matrix and where the risk falls within the matrix. All red risks will be shown first because they are the heaviest within your project.

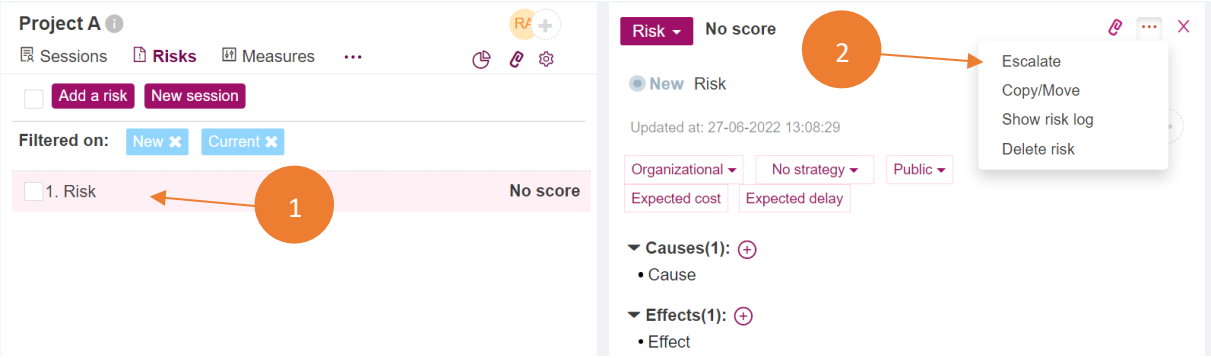
MODULE: Escalate & Delegate

This module makes it easier for you to share risks with each other across different projects. You can now easily escalate risks from other projects to the *strategic project*. From this project it is possible to delegate risks to your project.

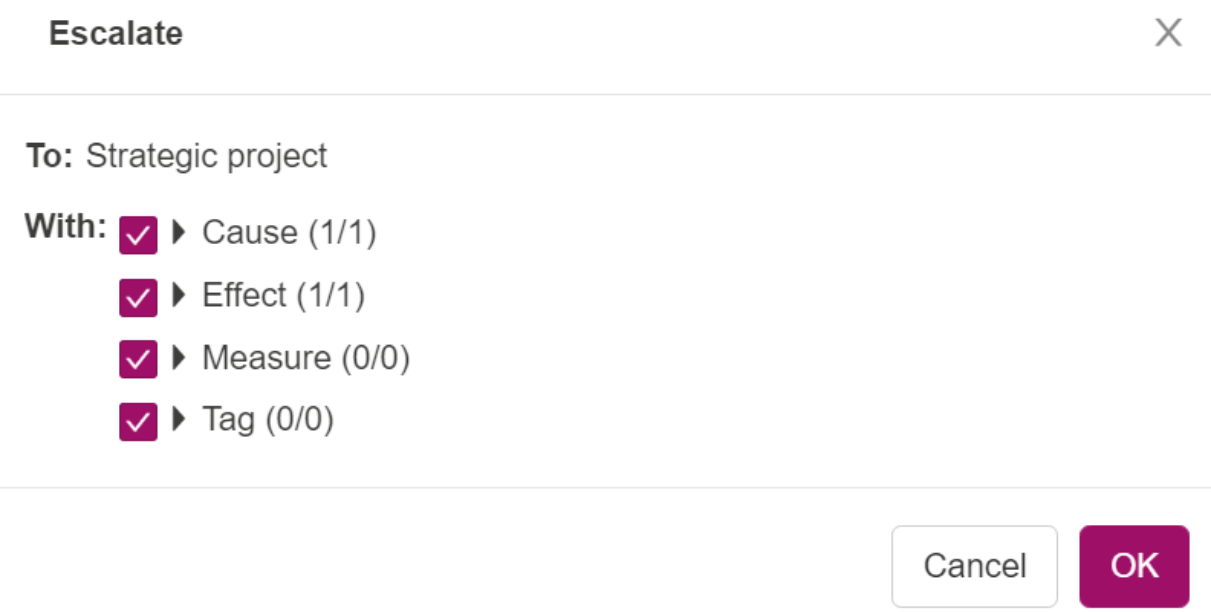
Escalate

Escalating risk is sharing a risk with a project that has been characterized as a *strategic project*.

Escalating risks to the strategic project



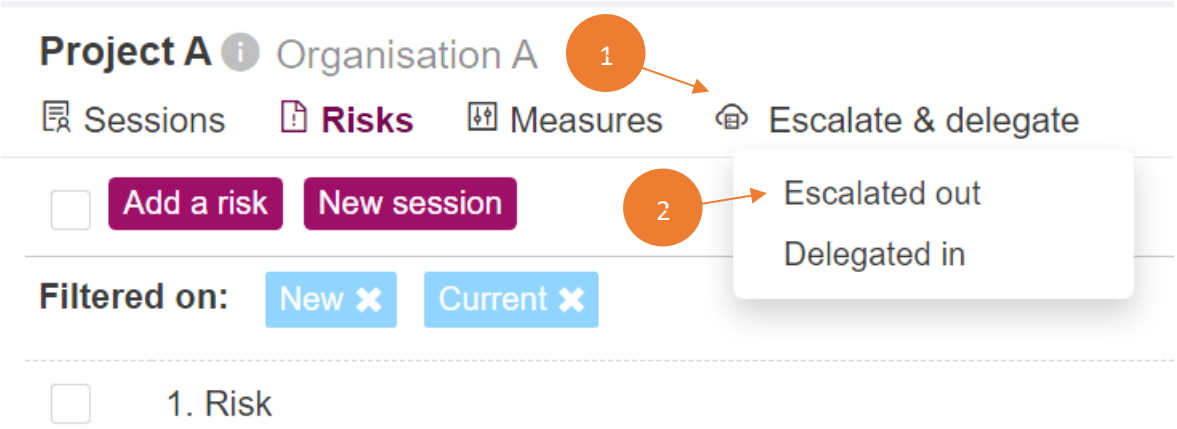
1. In the risk list, open a risk so that a detail screen appears on the right.
2. In the details screen, click ••• and then click *Escalate*.



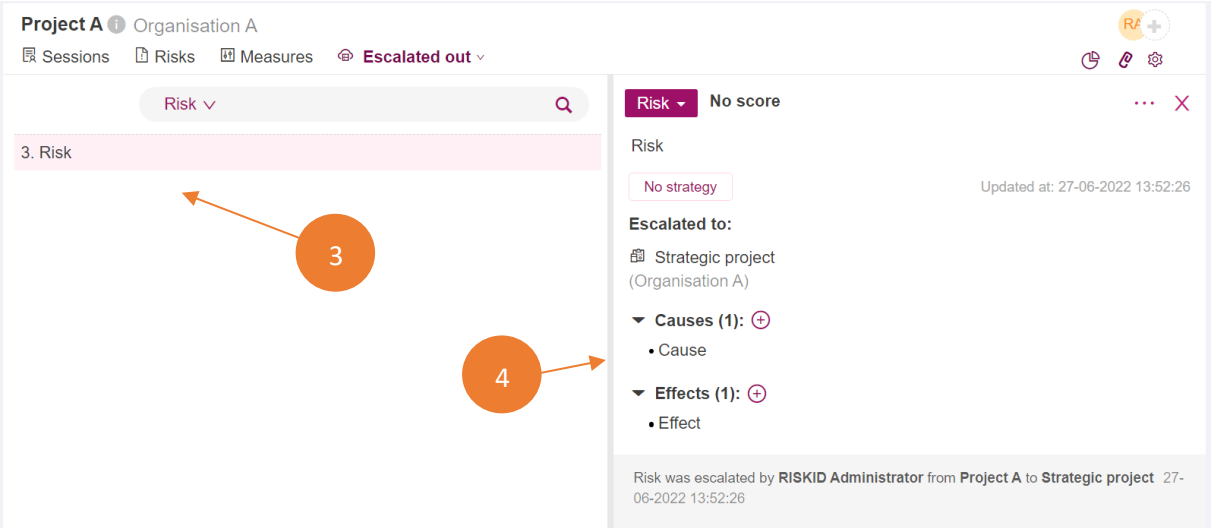
3. Then decide what information you want to share. It is not possible to share information other than what is shown here.

Manage escalated risks from the lower project

When a risk has escalated to the strategic project, it can be further managed in the *Escalated out* list.



1. Click *Escalate & Delegate*.
2. Choose *Escalated out*.



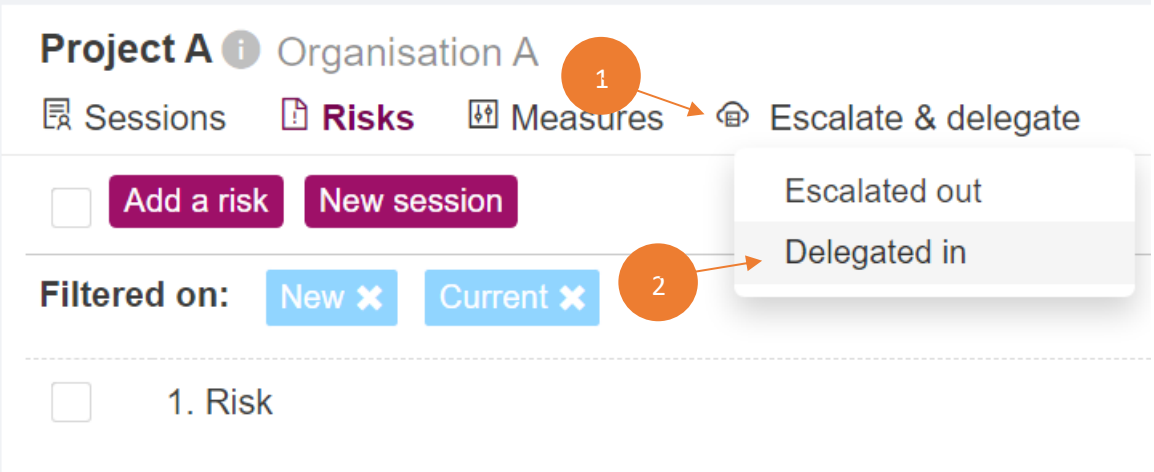
3. On the left you will find all the risks that have escalated from this project to the *strategic project*.
4. After opening a risk, you can still change the risk on the right side. These changes can also be seen from the *strategic project*. Here you can work together on the risk.

5. By clicking on ••• you can *withdraw* the risk.

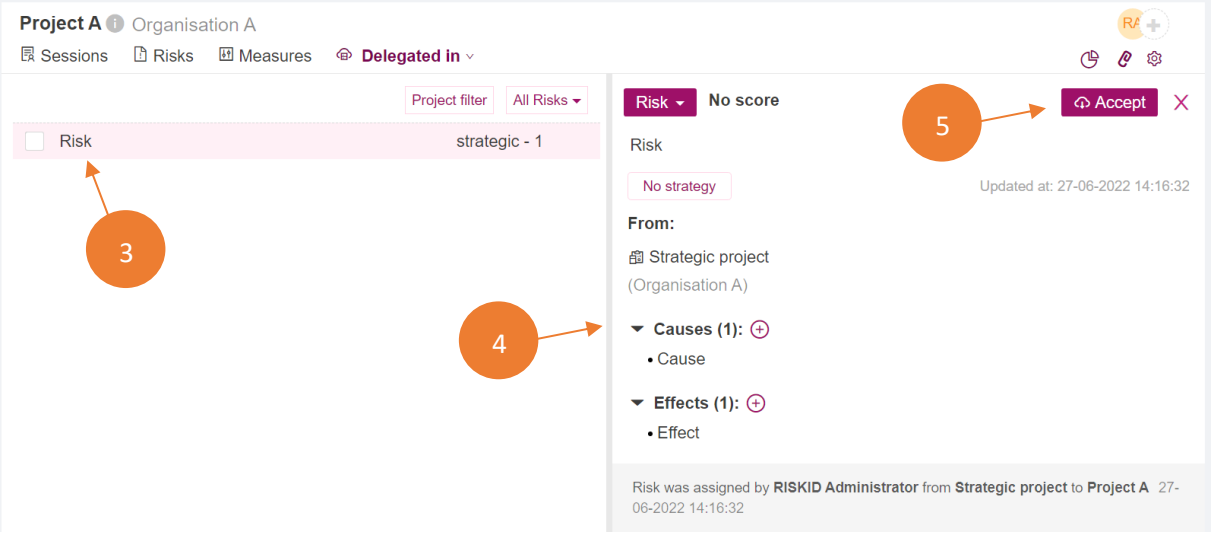
Delegate

From the *strategic project,* risk can be delegated to your project.

Manage delegated risks from the lower project



1. Click *Escalate & Delegate*.
2. Choose *Delegated.*



3. On the left you will find all the risks that have escalated from this project to the *strategic project*.
4. After opening a risk, you can still change the risk on the right side. These changes can also be seen from the *lower project*. Here you can work together on the risk.

Here you can accept the risk and it will appear in your risk list.