

RiskyProject Enterprise 6

Project Risk Management Software

Administrator's Guide

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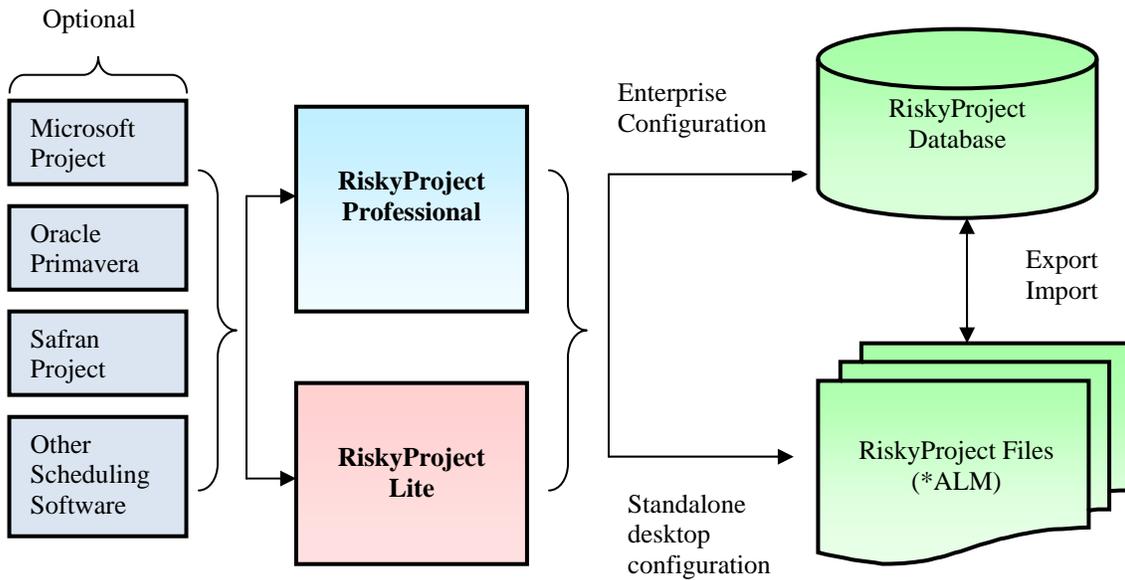
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Chapter 1: Introduction to RiskyProject Enterprise

About RiskyProject Enterprise

RiskyProject is a 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 packages is used for desktop and enterprise software, switching from one version to another is fast 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)

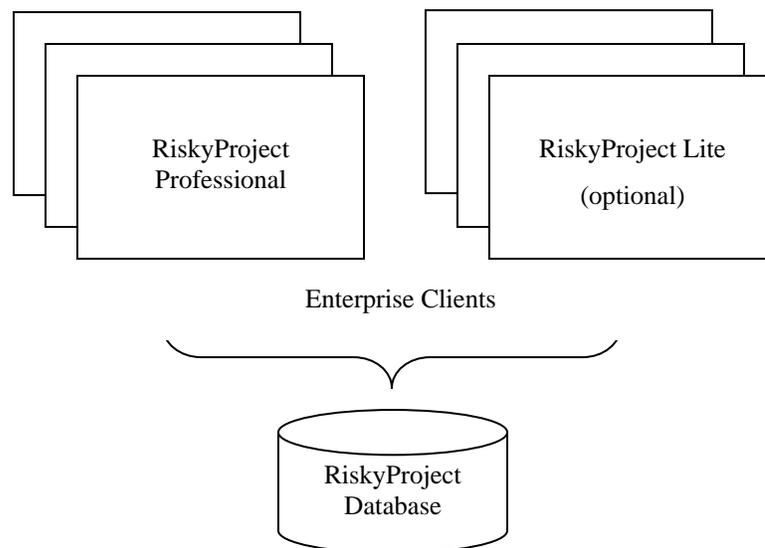
License file includes the following information:

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

By default (without license files) 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 higher. SQL Server Express can be downloaded free of charge: <http://www.microsoft.com/en-us/sqlserver/editions/2012-editions/express.aspx>
4. RiskyProject Lite installation file (optional):
 - RiskyProjectLiteSetup.msi (for x64 version of the software) or
 - RiskyProjectLiteSetup32.msi (for 32-bit version of the software)

RiskyProject Lite can be an Enterprise system client; however, you will require RiskyProject professional to configure and manage the system



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

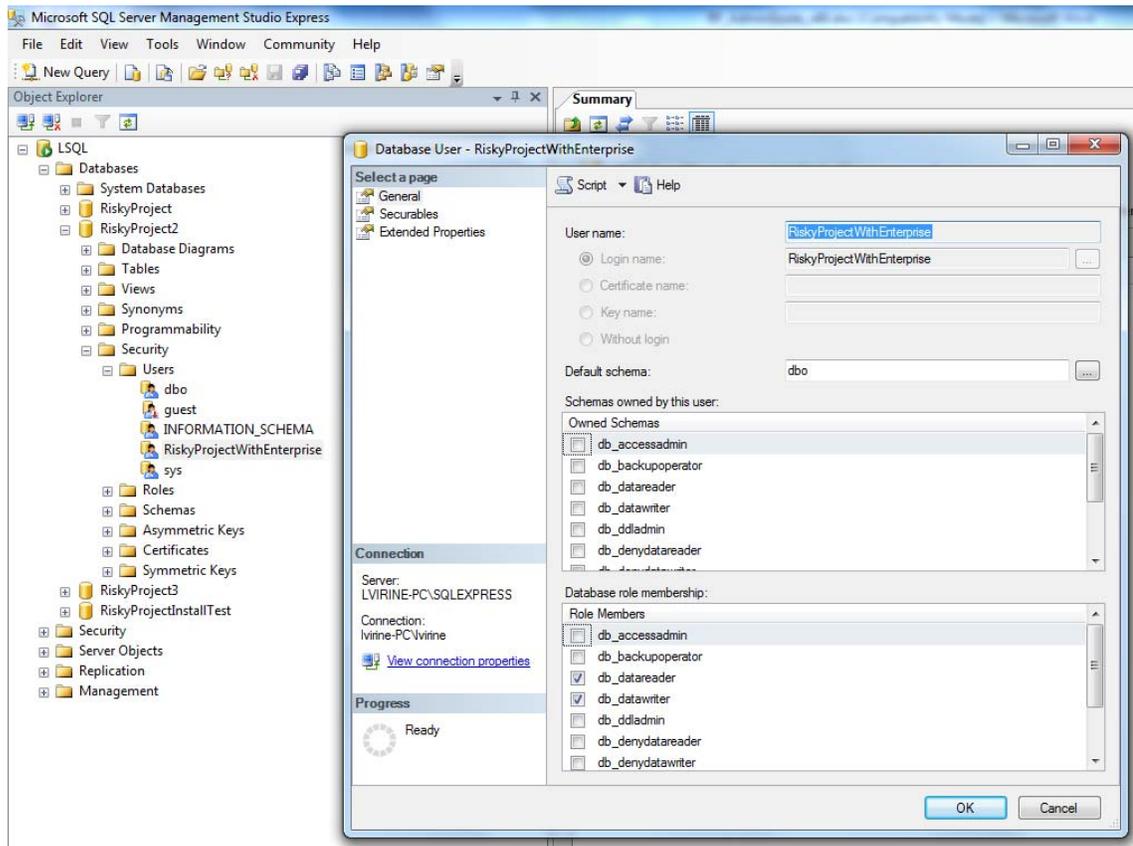
The RiskyProject database must be accessible by RiskyProject clients (RiskyProject Professional or RiskyProject Lite), which are installed on computers on a network.

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 how to configure a firewall please visit: <http://msdn.microsoft.com/en-ca/library/cc646023.aspx>.

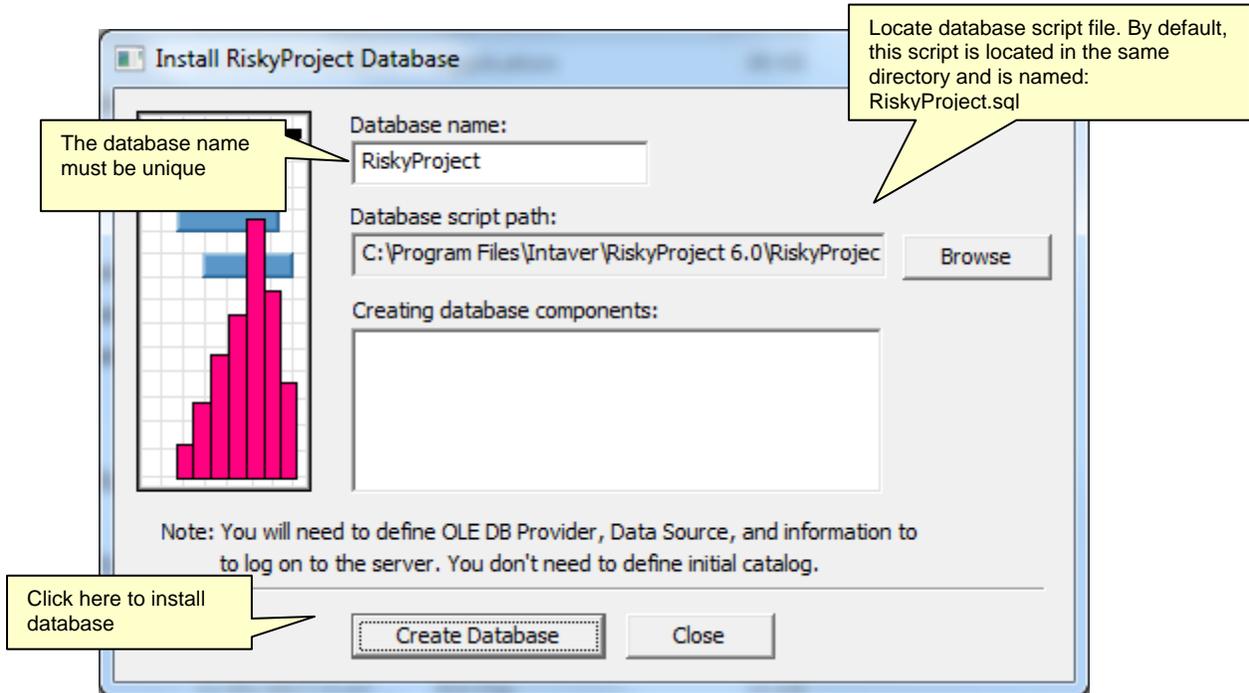
For each Windows user or group on your network that will be running RiskyProject Enterprise, you must use SQL Server Management Studio to create:

1. SQL Server Logins for all your users or groups, and
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.

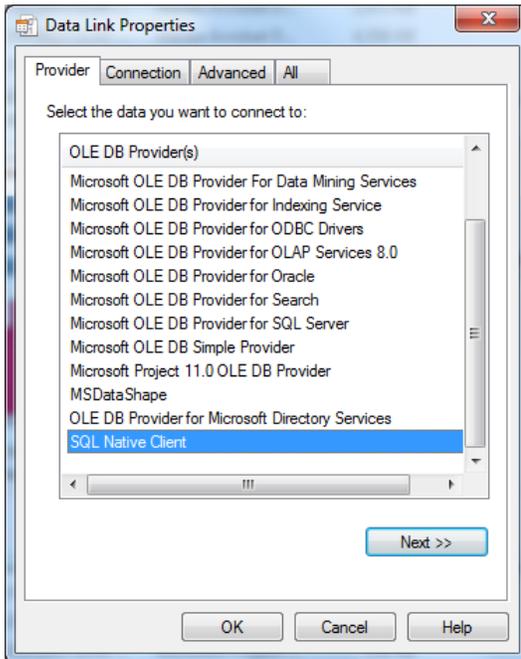


Step 3: Install RiskyProject Database

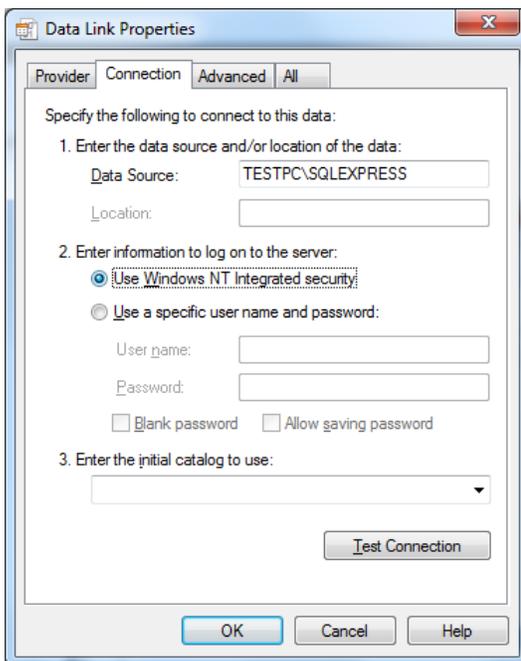
1. From RiskyProject directory (e.g. C:\Program Files\Intaver\RiskyProject 6.0) launch **RiskyProjectDB.exe**.



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

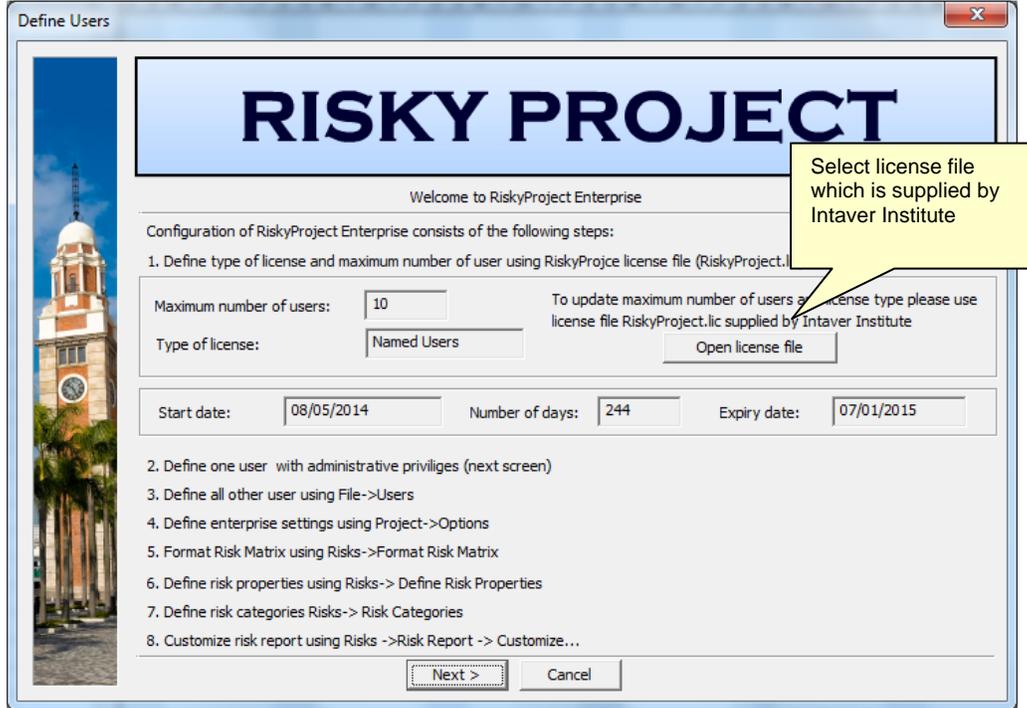
1. Launch RiskyProject Professional
2. Select **Enterprise Client (requires database)**
3. Configure database connection: follow the same steps you use to connect to the database as you did in step 3. In *Enter the initial catalog to use* don't select database you just created.
4. Enter user name **sa**. Do not enter any password. This user name will be used if there no any users user 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 is coming from 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 you would need new RiskyProject license file (RiskyProject.lic). You may enable this file using File-> Users -> Users tab.

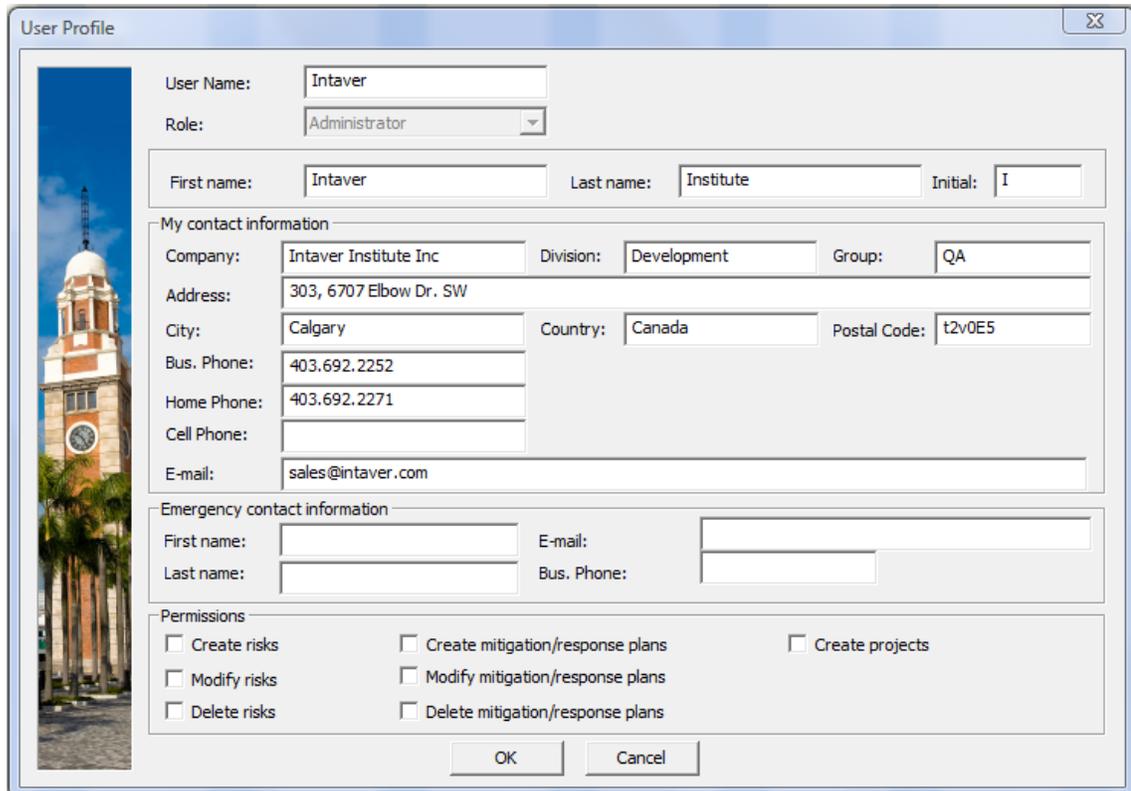


Step 6: Create the Administrator User

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.



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 when you logon to the RiskyProject, you would use this user name and password; user name **sa** will not be valid anymore.
 5. Click **OK**.
-

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 a 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: Administrator full access to RiskyProject

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

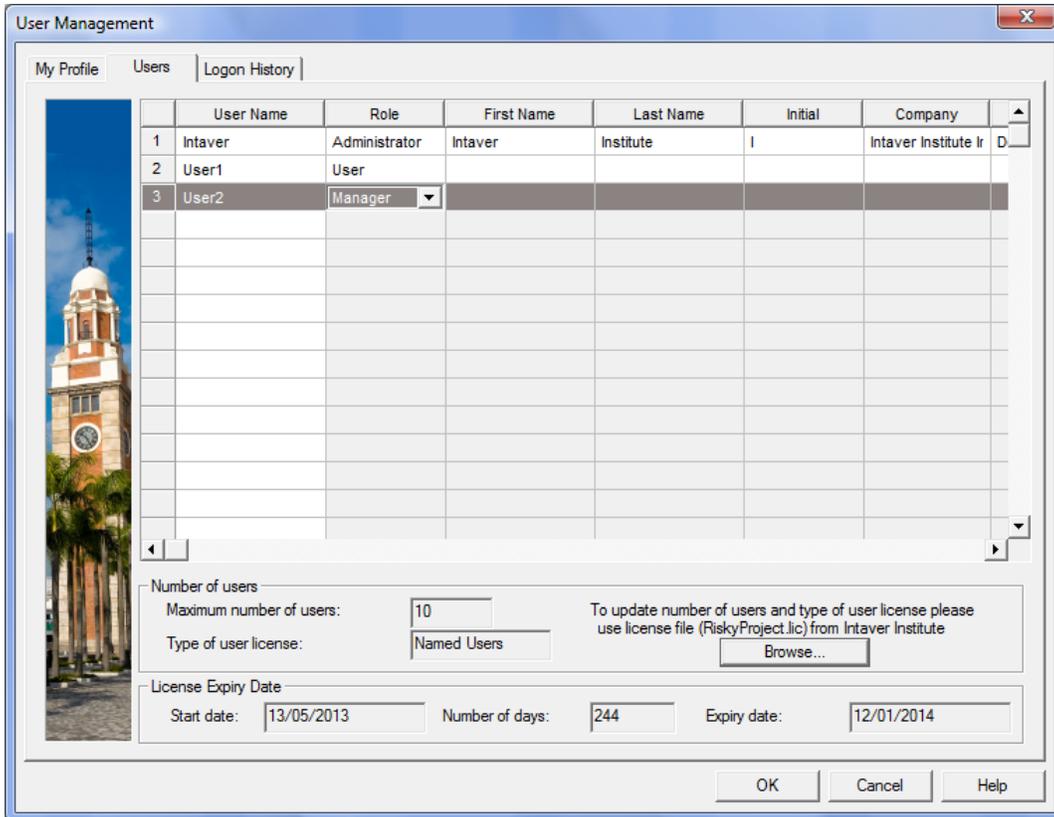
User: User cannot manager users, modify portfolio settings, and delete projects. In addition, administrator can limit user's permissions.

Create a New User

Once you have created the Administration 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. Select a role for the user.



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

About Project Permissions

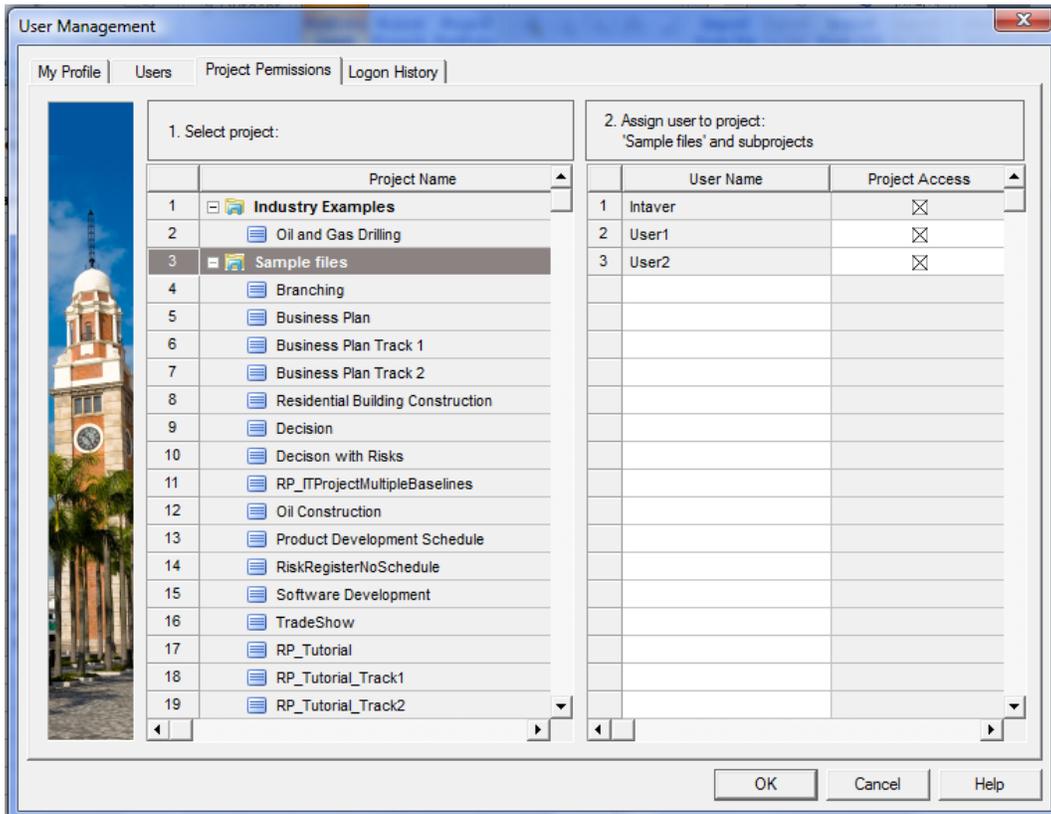
You can control access to projects using project permission. Project permissions either allow or deny users access to projects in your Portfolio. If you give access to a user (Manager or User), they will have complete access to the specified project(s) given the permissions they have been granted. User project permissions granted to a program (summary project) overwrite project permissions to all of its projects.

Adding Project Permissions to a user

You must be an administrator to add or modify project permissions.

To add project permissions to a user:

1. From the **File** menu, click **Users**. The **User Management** panel opens.
2. Click the **Project Permissions** tab.
3. On the **Project Name** pane on the left, select the project to which you want to provide or modify permissions. On the right is a table of name users in the system.
4. From the list on the right, select the check box associated with the users to which you want to grant permission to the selected project. You can deny user access by clearing the check boxes.
5. Click **OK** or switch to another tab.





Project permission tab is not shown if database does not have any projects. It usually occur if you just created a database.

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. In can be useful if the user “killed” the application without properly existing it. If you use concurrent user licensing model, it would limit number of concurrent sessions: 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 to 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

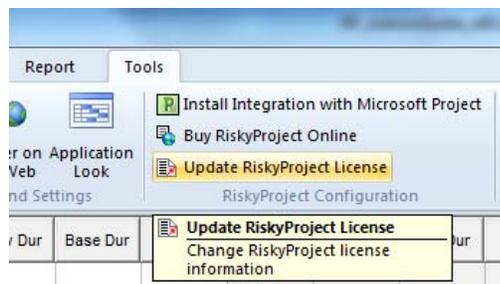
You would need get RiskyProject license file (RiskyProject.lic) from Intaver Institute Inc. Only Administrator may update license information.

To update RiskyProject Enterprise license information:

3. From the **File** menu, click **Users**. The **User Management** panel opens.
4. Click the **Users** tab.
5. Click on **Browse** and locate new RiskyProject.lic file.
6. 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 **Update RiskyProject License** button at 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, Standalone license is saved in the Windows registry. You would need a license number, provided by Intaver Institute Inc.
2. If you switch from standalone desktop configuration to enterprise configuration, you need to define database connection properties as it was described in *Chapter 2: RiskyProject Enterprise Installation*.
3. If you are in Enterprise mode, you may want to connect to different database. Click on **Update RiskyProject License** and select **Enterprise: update database parameters**. You will be prompted to define database connection properties.



1. You may switch from Enterprise configuration to standalone desktop configuration by clicking on **Start regular desktop license (no database)** with RiskyProject Enterprise logon dialog.
2. If database connection is not available and your current configuration is enterprise, you will be prompted to define database connection properties.
3. Your database connection properties are saved in the system registry:
Computer\HKEY_CURRENT_USER\Software\Intaver\RiskyProject Pro x.x

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

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 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 project is created and imported, it is possible to define individual options for each project using Schedule->Options. However the system administrator may deny user the ability to define options for individual projects using setting on Project->Option.



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

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