WissIntra NG

User Manual

Risk Manager

You cannot simplify complex facts at will. However, the way to find the required information must be as simple as possible.

Arne Klein, Head of Software Engineering

User Manual Risk Manager WissIntra® NG

For further information and manuals, simply scan the QR code or click the following link:

https://www.kuk-is.de/kundenzentrum.html

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1 About this manual

This manual contains important hints that will help you to work with WissIntra NG and will support you to reach your goal faster. It is an essential aid for safe operation.

If you still have questions not answered in this manual, please refer to our service desk. You find the details at the end of this manual. For further questions or suggestions, please do not hesitate to contact us.

Gender-specific terms

Since using gender-specific differentiation of female and male terms makes texts hard to read, we will continue without it. By using the generic masculine, we refer to both genders. Therefore, all of these terms should be regarded as gender-neutral in the sense of the Equal Treatment Act.

Intended use

This manual is valid for the software version mentioned here and is not subject to the manufacturer's modification service. It only describes the specific module. For further information, which is necessary for the use of the different modules of WissIntra NG, you will receive the corresponding manuals for the respective modules.

This manual does not claim to provide a full description. Any use other than described herein is considered improper. The manufacturer shall not be liable for damages caused by incorrect usage of the software, insufficient knowledge of the provided documentation, reasonably foreseeable misuse or other inappropriate actions.

Copyrights

Instructions for use

This manual contains numerous tips, suggestions and instructions. These text elements are represented as follows:

- **Bold**: Prompts and important information are highlighted in **colour and bold**.
- UPPERCASE LETTERS: Uppercase letters (e.g., CTRL + S) indicate shortcuts.
- Bullet-Point: A bullet point • represents instructions and input prompts.

Note: Useful information is marked with a frame and the word Note. This provides helpful information and tips.

Caution: Warnings are marked with a grey background and the word **Caution**. This identifies possible risks.

Definition: Technical terms are marked with a frame and the word **Definition**. This indicates the explanation of terms.

2 Getting Started

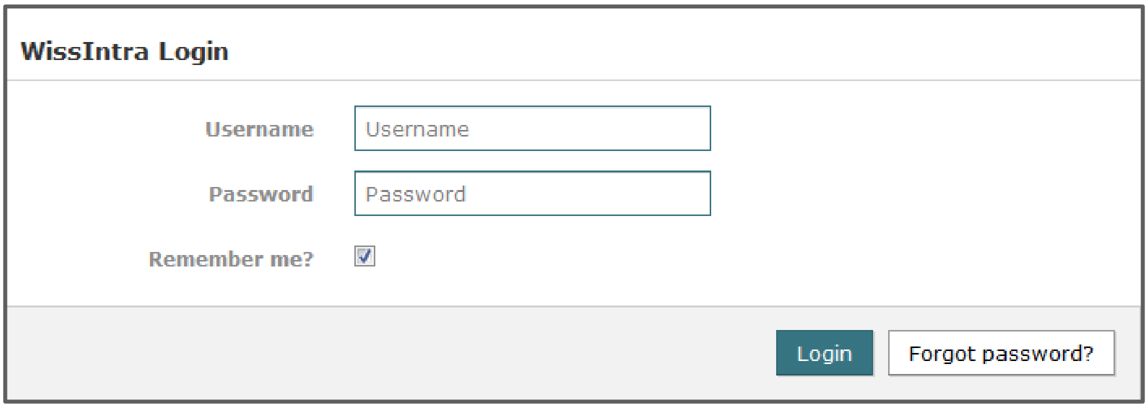
This chapter provides information about the following topics:

- Login to WissIntra NG
- Structure of the operating concept of WissIntra NG
- Handling of the cockpit of WissIntra NG
- Options for the profile settings
- Using the lexicon
- Permission concept

2.1 Login

- Open WissIntra NG in a web browser, such as: the latest Google Chrome, Mozilla Firefox or Microsoft Chromium Edge.

The following WissIntra NG login opens:



- Enter your **Username** and **Password** and click **Login**.

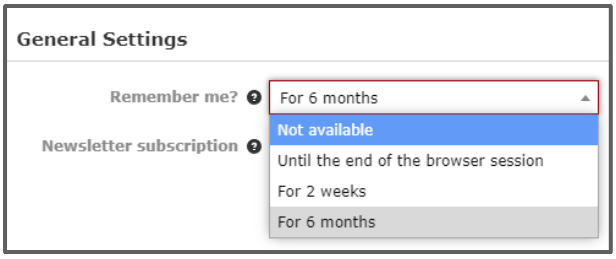
Note: If your user was created via the LDAP interface, please us your Windows password.

Remember me?

- By selecting this check box, you will be logged in automatically the next time you open WissIntra NG.
- The permanent login time can be set up to a maximum of 6 months.

Note: When you delete your browser cookies, you cancel the **Remember me?** in WissIntra NG. You have to login again with the correct data.

- As administrator you can select the duration of the **Remember me?** option. To do this, navigate via the **User** in the navigation bar to the **Settings** and click on **User Settings / Functions**. In the **General settings**, you can select the duration.



Note: After a user has been inactive in WissIntra NG for 20 minutes, a session timeout occurs and the user is temporarily logged out. This will make the previously used licence available for the next user.

The same happens when you log off from your browser by clicking on . The licence will be blocked by the user for additional 20 minutes. You can avoid this by logging out from WissIntra NG.

Forgot password?

If you have forgotten your password, you can request a new password:

- Click on **Forgot password?**
- The following dialog box appears:

- Enter your e-mail address and click on **Send**.
- The new password is sent by e-mail when you are registered as an active user. If your user is inactive, WissIntra NG also informs you about this and refers to your system administrator.

Note: This does not apply to LDAP users and group users.

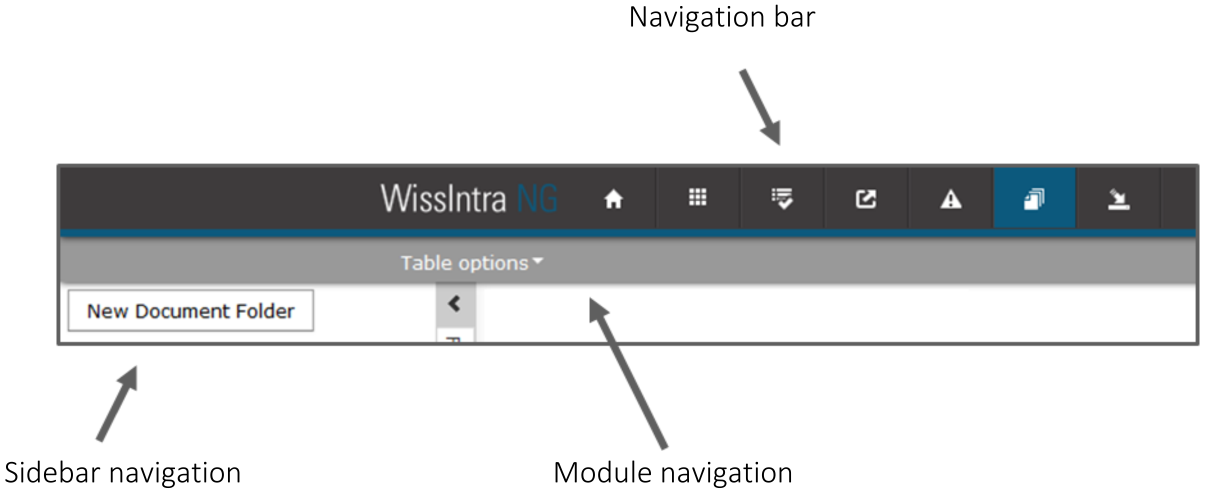
2.2 Operating concept

WissIntra NG has a new, consistent and user-friendly operating concept, which also allows inexperienced users to work quickly and securely with the software.

Since WissIntra NG opens directly in a web browser, no separate installation is required for individual users. The software works as intuitively as you are used to by surfing the web.

In WissIntra NG information is displayed in different navigation levels.

1.	Navigation bar	This is where the user navigates between the modules (top level).
2.	Module navigation	Here the user navigates within the respective module and selects between different views.
3.	Sidebar navigation / Explorer	Here the user navigates within a tree view structure between different lists and tables.

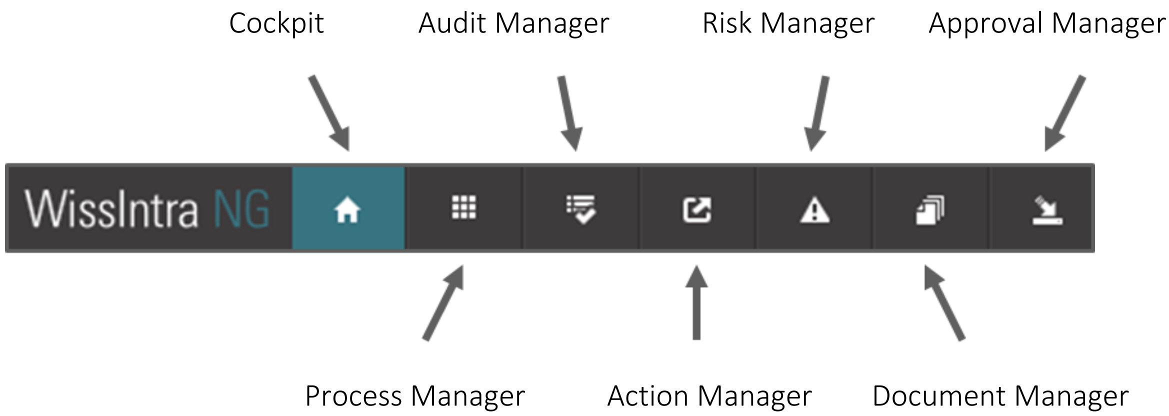


Modules

The various software applications, such as the Process Manager or the Audit Manager, are called modules.

You can access the modules directly in the navigation bar. The appearance may vary depending on which modules you have purchased. The basic module, the Document Manager and the Approval Manager are always included.

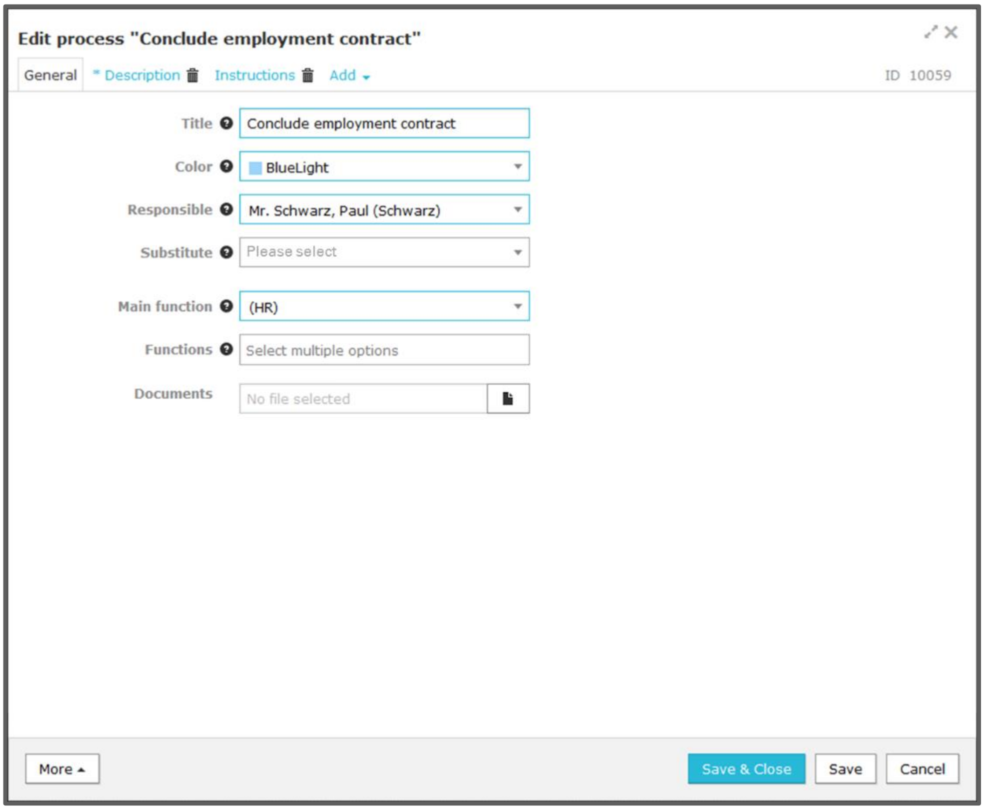
The graphic below shows the Cockpit, the Process Manager, the Audit Manager, the Action Manager, the Document Manager and the Approval Manager from left to right.



By clicking the respective symbol, the corresponding module opens. You can also click on the name of the module in the drop-down that appears on mouse-over.

Modals

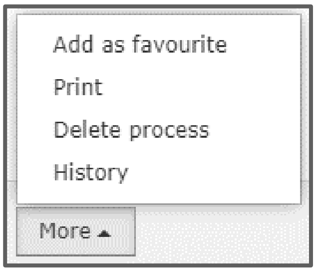
Dialog windows, which block the background, are called modals. They are usually split into different tabs which can be added for further input.



Note: If changes in a modal have not been saved, the corresponding tabs are marked with a "*".

Validation errors are marked by underlining the tab name in red.

When uploading documents that are subject to an approval workflow, the tab name is underlined in purple, and the document itself is displayed in purple, as long as the approval has not been given.

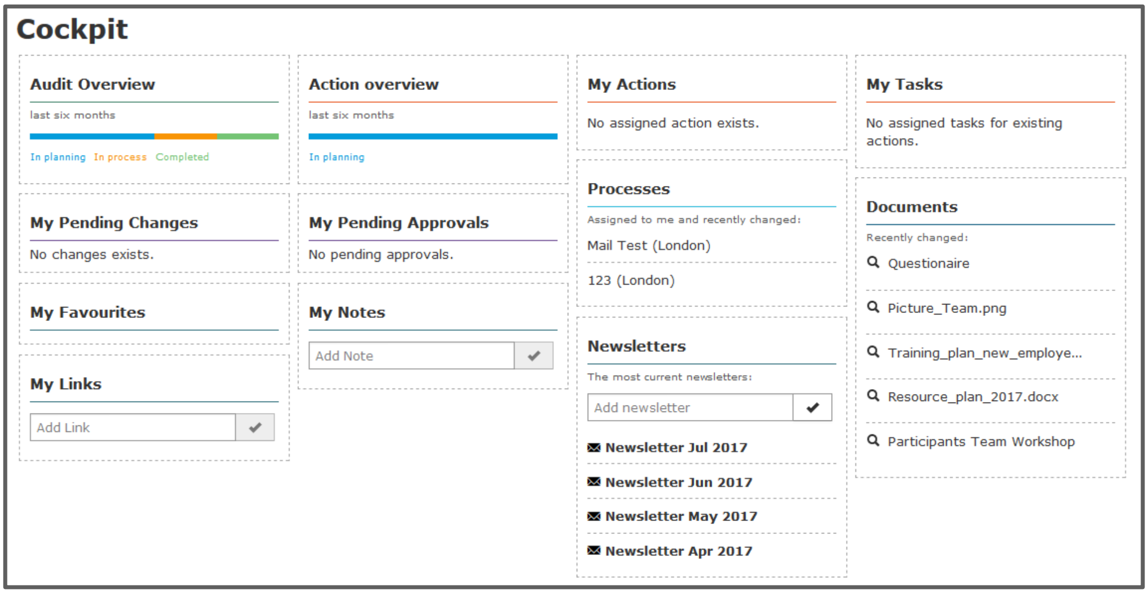


Most modals have the button More at the bottom left. Here you can find additional functions that you can use in the current context.

2.3 Cockpit

The cockpit is the start page of WissIntra NG, which opens after login.

The cockpit represents the control centre with quick access options that you can assemble and adapt yourself. By clicking on the corresponding links, you can directly access the desired object or process.



Note: The display of the boxes can vary depending on the modules you purchased. The **Documents**, **My Notes**, **My Pending Changes**, **My Pending Approvals** and **My Favourites** are shown all the time.

Navigation bar and cockpit offer the following functions:

Symbol	Name	Explanation
	Process Manager	You can use the Process Manager module to organize your processes. For more information, please refer to the WissIntra NG Process Manager manual.
	Audit Manager	You can use the Audit Manager module to organize your audits. For more information, please refer to the WissIntra NG Audit Manager manual.
	Action Manager	You can use the Action Manager module to organize your activities. For more information, please refer to the WissIntra NG Action Manager manual.
	Risk Manager	You can use the Risk Manager module to organize your risks. For more information, please refer to the WissIntra NG Risk Manager manual.
	Document Manager	You can use the Document Manager module to organize your documents. For more information, please refer to the WissIntra NG Document Manager manual.
	Approval Manager	You can use the Approval Manager for documents to manage changesets that need to be approved.
	Profile settings	Use this icon to access your user profile. There you can set your password, the colour theme, the default folder and default location. You can also see your assigned roles and functions.
	Language	This icon will take you to the selection where of the interface and content language. This is only possible if other languages have been purchased.
	Location	Use this icon to select the location within the drop-down menu. This is only possible if your system has different locations.
	Help	This icon gives you access to the WissIntra NG manuals and information about the program version and Release Notes.
Search	**Search**	Using the search mask, you can search for terms in all modules.

	Processes	Here you can see all modified processes assigned to you. With one click, you can access these processes directly.
	Documents	Here the last five documents that have recently been modified are shown. Clicking on it, you can download these documents. A click on the magnifying glass opens the modal with the details for the document.
	Audit Overview	Here all the audits of the last six months are shown unfiltered in their respective statuses. With one click, you can access this overview directly.
	Action Overview	Here, all the actions of the last six months are shown in their respective statuses. With one click, you can access this overview directly.
	My Actions	Here all the actions of the last six months that have been assigned to you are shown. With one click, you can access this overview directly.
	My Tasks	Here all the tasks assigned to you for existing actions are shown. With one click, you can access the tasks directly.
	My Pending Changes	All the user's change packages are listed here. The change packages here refer to documents.
	My Pending Approvals	Here all the approvals for documents that are waiting for your decision are shown.
	My Notes	Here you can enter personal notes by using the text field. These notes are only visible for you.
	My Links	Here you can enter personal links by using the text field. These links are only visible for you.
	My Favourites	Here you can see all the favourites you have created. With one click you can access your favourites directly.
	Newsletters	Company-internal information, such as newsletters, can be stored here by the administrator and are visible for each user.

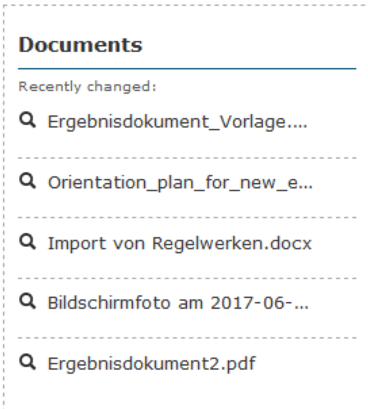
2.3.1 Cockpit boxes

Processes

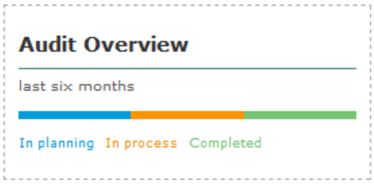
The **Processes** box displays your 5 last modified processes. This means the 5 processes that have recently been changed and to which you are assigned to as process responsible or substitute.

Documents

The box **Documents** shows a list of all recently changed documents for which the user has the appropriate permission. It displays the last five effective changes.



Audit Overview



In the box **Audit Overview** you can see all audits for the current location with their corresponding statuses in a colour bar. You can see all audits that have been completed in the last six months. Audits in planning or in process are shown without any time restriction.

- In planning (blue)
- In process (orange)
- Completed (light green)

Action Overview

This **Action Overview** shows all actions for the appropriate location with their corresponding statuses. You can see all actions that have been checked for effectiveness from the past 6 months. Actions from a different status are shown no matter, which start date they have. For a better overview, they are displayed in a colour bar.

WissIntra NG differentiates the following statuses:

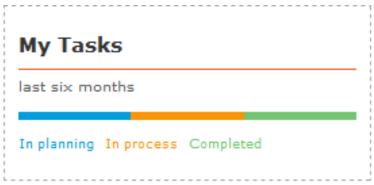
- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

My Actions

In the box **My Actions**, all actions related to the user are listed. This allows a quick and uncomplicated overview of upcoming actions. In addition, here the colour bar also appears for an easier overview:

- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

My Tasks



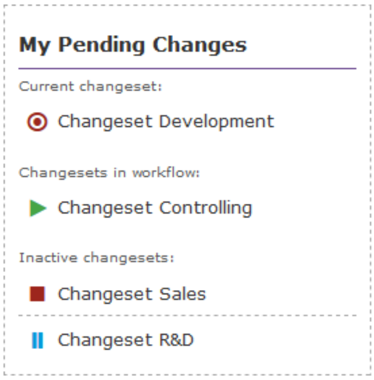
The **My Tasks** box gives you an easy overview about your tasks from the last 6 months as well as future tasks. A colour bar indicates the progress of the tasks:

- In planning (blue)
- In process (orange)
- Completed (light green)

My Pending Changes

The Box **My Pending Changes** shows all of the user's changesets, divided in:

- Current changeset
- Changeset in workflow
- Inactive changeset



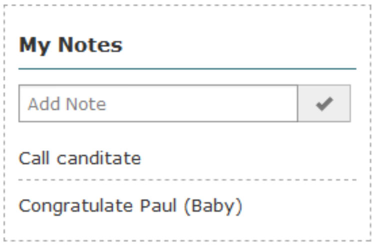
My Pending Approvals

In the Box **My Pending Approvals**, all changesets are listed that still await a decision by the user whether the approval is granted or not.

My Notes

In the box **My Notes**, you can save personal notes.

- Enter your note in the text field.
- Click the checkmark. The note appears under the text field.
- Repeat the procedure to save additional notes.
- Click the pencil icon to edit the note.
- Click on the recycle bin icon to delete the notes.



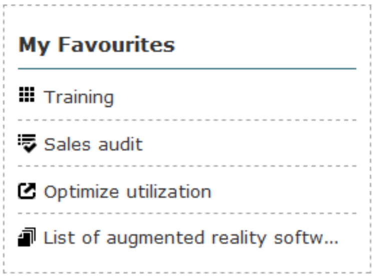
My Links

You can add personal links using the text field **Add Link**.

- Enter the link in the text field.
- Click the checkmark. The link appears under the text field.
- Repeat the procedure to save additional links.
- Click the pencil icon to edit the link.
- Click on the recycle bin icon to delete the link.

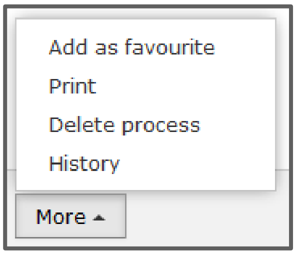
My Favourites

The **My Favourites** box allows you to place links out of processes, audits, actions, risks and documents for direct access.



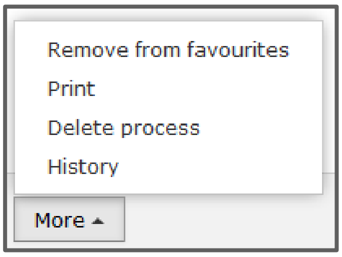
Add as favourite

- Open the process, audit, action, risk or document modal which you want to save as favourite.
- Clicking on the button More opens additional functions.
- Click on **Add as favourite**. A short message confirms that a new favourite has been successfully added to your favourites list in the cockpit.
-



Remove from favourites

- Open the detailed view of the object and navigate to More.
- Click **Remove from favourites**.
- Alternatively, you can also remove the saved favourites directly in the cockpit by clicking on the recycle bin icon .



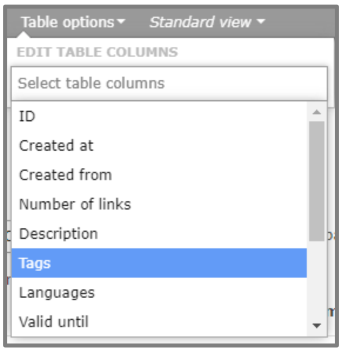
Newsletters

In the box **Newsletters**, company-wide information such as newsletters can be added. This box, if filled, is visible to all WissIntra NG users and is managed by the administrators. The maximum number of entries displayed is limited to five.

2.4 Table options, filters and views

Table options

Within the different WissIntra NG modules, where there are table overview pages, you have the possibility to adjust all columns of the tables.

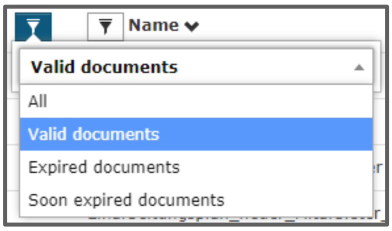


- In the module navigation (submenu), click on **Table options** and select the columns to be displayed.
- Furthermore, you can deselect all columns that are irrelevant for you.
- using drag and drop, you can arrange the columns within the table.

On the right you see the example of the selection for the table columns in the Document Manager.

Filter

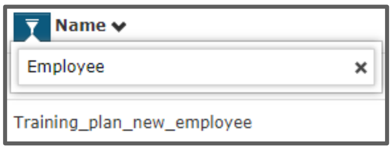
Each column in a table view can be filtered.



Columns with fixed values:

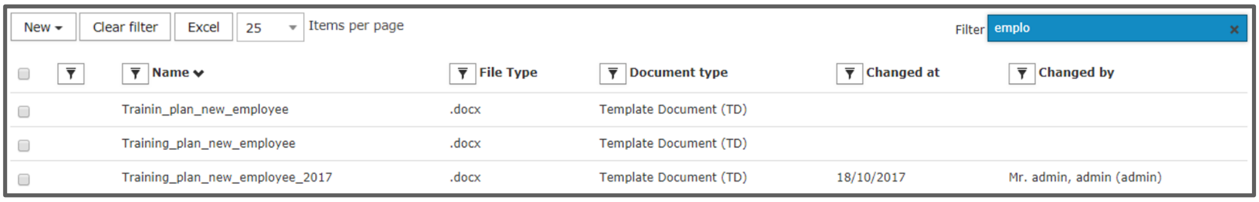
- Click on the filter icon and select a value from the drop-down list.
-

Columns with free content:



- Click on the filter icon and enter the term, number or date by which you want to filter in the free text field.

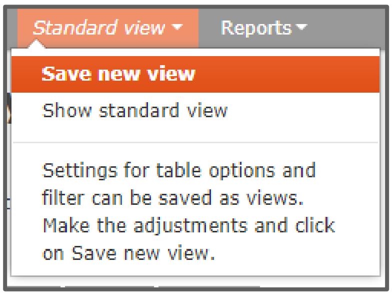
You can also filter across all columns using the general free text field on the right above the table.



Views

The table columns and filters you have set are automatically saved by WissIntra NG for similar table views, so that, for example, when you switch between different document folders, the same columns are always displayed.

If you have not made any adjustments to the table columns or filters, you see the table in the **Standard view**.



Show standard view

- Move the mouse in the submenu to **Standard view** and click on **Show standard view** to reset all additionally selected table columns and filters.

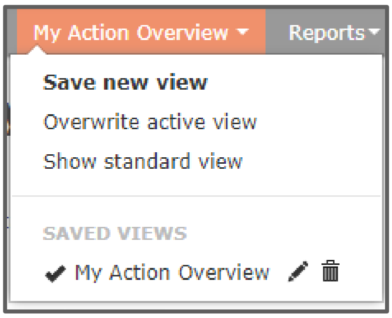
Save new view

You can also save your own views for similar tables.

- To do this, select the columns that you want to display in a table and/or filter for one or more values.
- Go to ***Standard view*** and click on **Save new view**.
- Enter a name and **Save** the view.

The view you have saved is immediately active and accessible via the submenu.

You can rename the view using the pencil icon and delete it with the recycle bin icon .



Overwrite active view

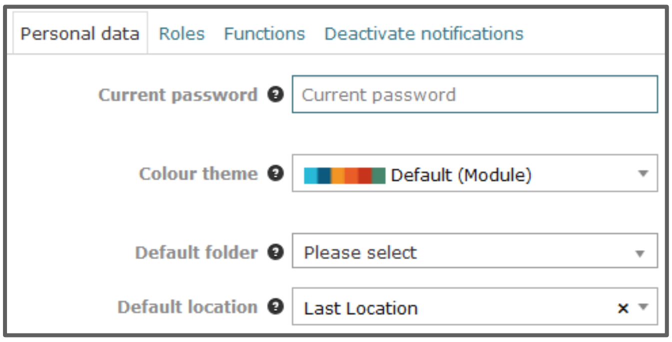
If you want to change a view that has already been saved, you can overwrite the view.

- Activate the saved view and make the desired changes to the table columns and filters.
- Click on **Overwrite active view**.
- If necessary, rename the view and click on **Save**.

2.5 Profile settings

Use the icon to access the profile settings.

- By clicking on **Profile settings** the following modal opens.



In this modal, you will find three or four tabs.

In the first tab **Personal data** you can make the settings for **Password**, **Colour theme**, **Default folder** and **Default location**.

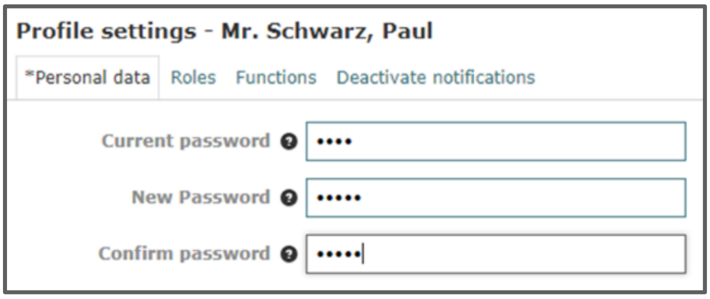
In the tabs **Roles** and **Functions**, the user can see which roles or functions are assigned to him within the respective locations.

In the tab **Deactivate notifications**, you have the option to deactivate the e-mail notifications sent out by WissIntra NG. You can see this tab only if your administrator has activated this feature. You can do this setting for each module separately by selecting the check box of the module from which you do not want to receive any notifications any more.

Note: If the tab **Deactivate notifications** is not available, contact your administrator.

Change password

- By clicking on **Current password** two new fields appear: **New password** and **Confirm password**.
- Fill out the fields with the current password and a new password.
- Save your change.

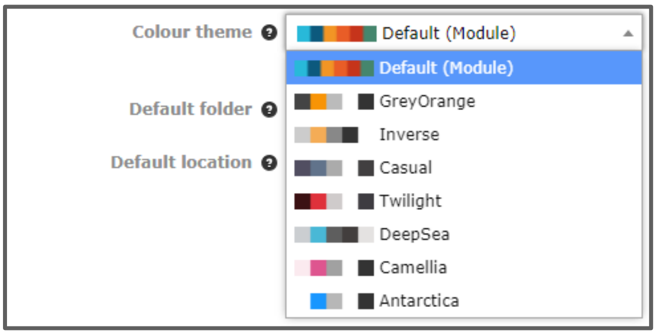


Note: This does not apply to LDAP users since they use the Windows password to login. This also does not apply to group users, since this password is always assigned by the administrator.

Set the colour theme

WissIntra NG offers you a selection of different colour themes. By using the colour theme, each user can customize his own interface.

- Select the desired colour theme in the drop-down menu.
- **Save** your choice.

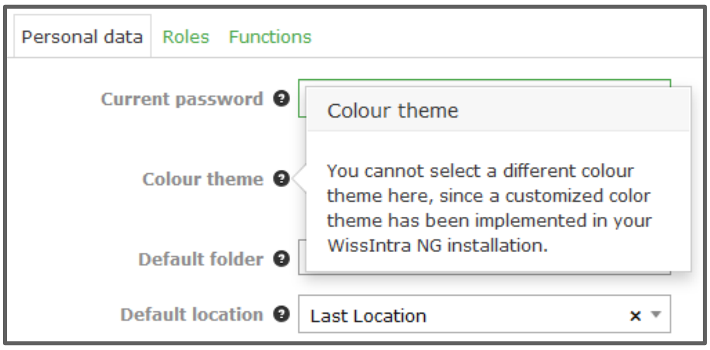


Note: The **Default (Module)** is selected from the beginning. Here each module has its own colour.

Customizing the WissIntra NG user interface

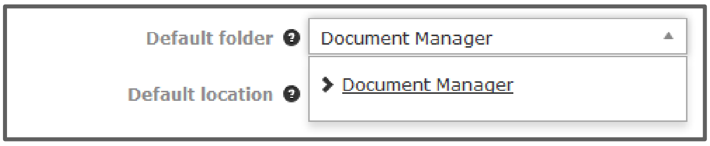
We offer you the possibility to customize the WissIntra NG user interface according to your wishes. You can find the information in the corresponding PDF in our Customer Centre.

Once you use your own customized colour theme, users of your system will no longer be able to select another colour theme.



Select Default folder

You have the option to change the default folder "Document Manager" which is set by WissIntra. This folder always opens the folder you have selected, both when starting the Document Manager and when selecting or uploading documents. This will help you navigate faster within the document manager.



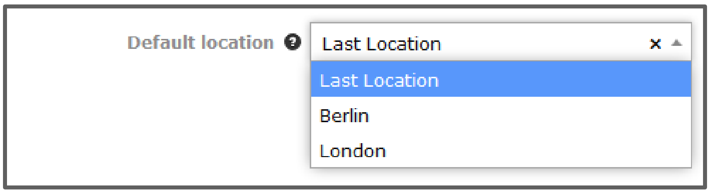
- Open the drop-down menu and navigate with ❯ to the desired folder.
- **Save** your selection.

Note: For group users, the default folder can only be set by the administrator. If you are working with a group user in WissIntra NG, you can see in the profile settings which folder was chosen by your administrator.

Note: Once the selected default folder is deleted, the root folder **Document Manager** is automatically set as the default folder.

Note: The ability to select a different folder as the default folder is only available if you have sufficient permissions in the document manager.

Select the default location

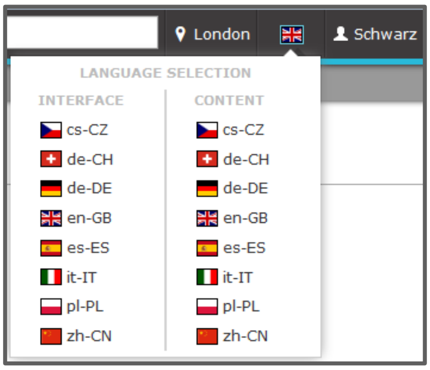


If you are able to access multiple locations in your system, you have the option to select a default location that will be opened each time you log in. Alternatively, you can choose that WissIntra NG always opens the location that was used at last.

- Select the desired location from the drop-down menu.
- **Save** your selection.

Note: If a default location is deleted, the option **Last Location** is automatically set here.

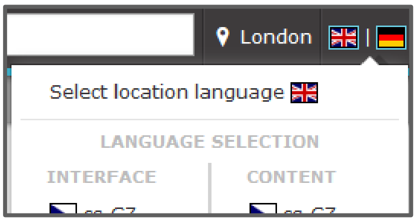
2.6 Language



Use the flag icon to access the language selection.

You have the option to select both, the language for the interface and the content.

This option is useful if, for example, a company has one location in Germany and one in England. Thus, an employee of the German location can display the content of the English location but continue working in the German interface language.



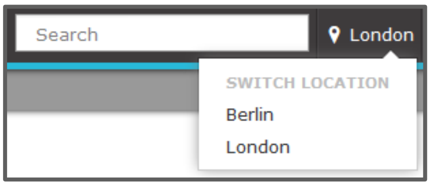
As soon as you have made such a selection, the option **Select location language** is displayed. This option changes both, interface and content to the language assigned to the specific location.

Note: The languages displayed here depend on your purchased licence.

2.7 Location

When you move the mouse over the current location, a drop-down menu appears. You can **switch location** if you have multiple ones and if you have the permission to see them.

- Click on the desired location.



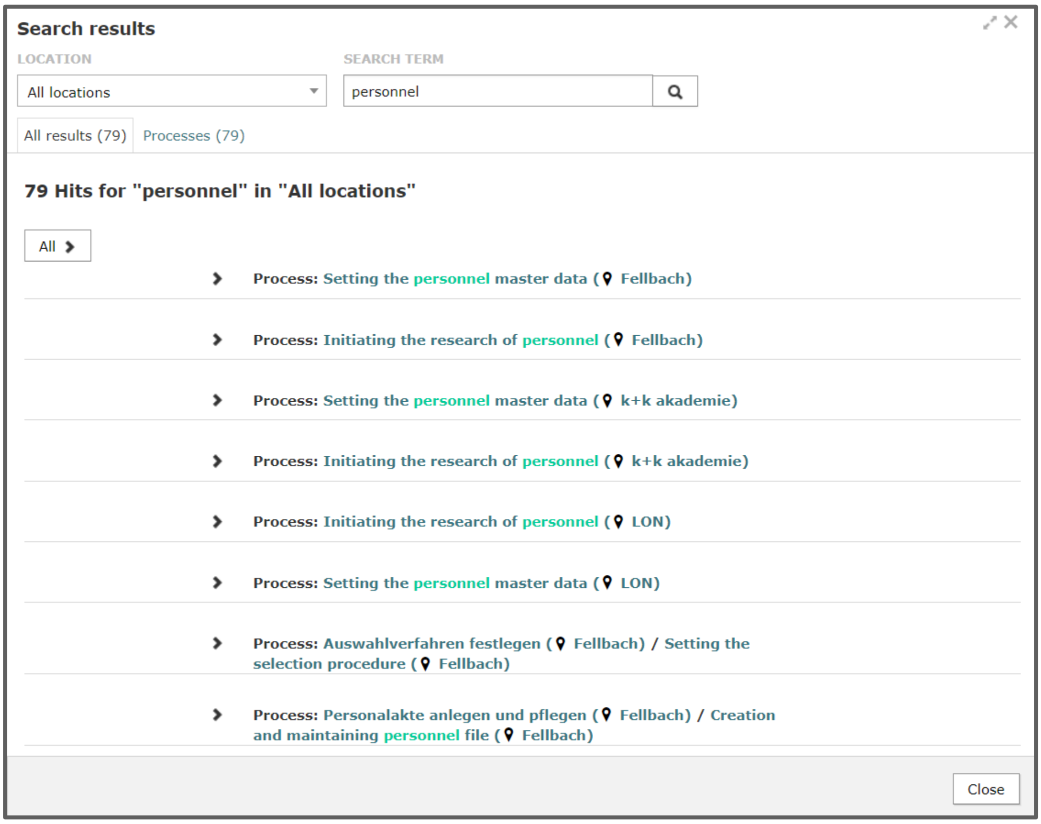
Note: Changing location is only available if you have several locations. This depends on your purchased licence. The administrator sets the parameters for the location.

2.8 Search

The **Search** in the navigation bar allows you to search for terms across all modules and locations in which you have the permission to work.

- Enter the desired term in the search field.
- Confirm by pressing **Enter**.

A modal opens where the search results are displayed and the term you searched for is highlighted in green. You can use the tabs to select whether you want to see **All results** or only those for one of the modules.
Here, e.g. the modal with the results for the search term "personnel".



Note: The search term must contain at a minimum 3 characters.

The search can be further refined. You can choose between the following three options:

1. Wildcard search

The wildcard search uses placeholders for single or multiple characters within the terms.

- Single character search with “?”:
  Here the “?” is used as a placeholder. For example, if you search for the terms “test”, “text” or “tester”, use the search term “te?t”
- Multiple character search with “*”:
  Here the “*” is used as a placeholder when you search for one or more characters. For example, if you search for “process*” you will get terms like “process”, “process description” or “process step”; if you search for “*process” you will also get “process” as well as terms like “main process”.
  When you use the placeholder before and after the search term, e.g. “*process*”, you will find all composite terms no matter if the additive term is before or after the search term.

2. Fuzzy search

The fuzzy search is based on the Levenshtein algorithm. To use this search, use “~” at the end of a single word.

Note: Press ALT GR + */+/~ to generate the tilde symbol (~).

- If you search for example for a term that sounds like „teacher“, you can use the Fuzzy search with “teacher~”. The search result contains terms like “teacher”, “teaching”, etc. The desired similarity can be specified with a value between 0 and 1. The closer the value is to 1, the more similar the terms will be.
  If nothing is specified, the default setting is 0.5.

3. Booster search

When searching for several words, a term can be boosted. The booster search allows you to control the relevance of a word. The higher the boost, the more relevant the search term is.

To boost a term, use the “^” symbol and a boost factor at the end of the term.

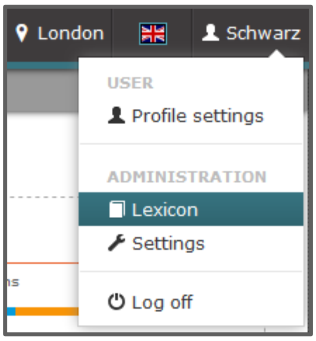
- For example, you search for “satisfied customer” and you want to increase the relevance of the term “satisfied”, you can boost it with the “^” symbol and a boost factor, e.g. “satisfied^4”. Thus, “satisfied” is 4 times more relevant for the search than “customer”. The boost factor has to be always positive (>0).

Note: As of October 2021, the default search behaviour in WissIntra NG changed in a way that the system does not open a modal dialog directly when there is only one search result found. Only when that result exactly matches the ID of e.g. a process, the process modal will be opened immediately. In all other cases, the system displays the usual search results page.

Note: If your search yields no results, you can try to change location and retry.

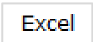
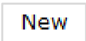
Note: Search terms with special characters like "-", "+" or "_" can be found in the search now. WissIntra is able to search for the complete word combination (e.g., "kick-off") and display the correct search result. Working with two special characters, for example "task-*", is also possible.

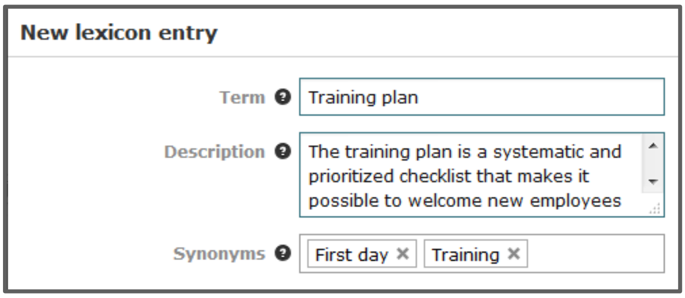
2.9 Lexicon



In WissIntra NG, all users with a Power User licence can create terms in the lexicon. Users with Read User licence can only read the lexicon. Terms that are inserted in the lexicon appear in dotted underline in free text fields. If you move your mouse over the term, the description appears.

There are two ways of creating a lexicon term:

- Navigate to the user  and open the lexicon.
- You will see an overview of all existing terms in WissIntra NG.
- Use the button  to export all terms into an Excel list.
- Use the button  to create a new term.
- Enter the term or an abbreviation, such as e.g. "CIP" in the field **Term**. In the **Description**, insert the text you want to appear on mouse-over. In the field **Synonyms**, you can enter terms which have the same meaning or similar use. The same description will be shown on mouse-over as well for these terms.

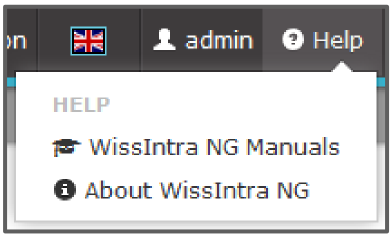


Alternatively, a lexicon entry can be made directly via each free text field:

- In the toolbar of free text fields, you can directly insert a term by clicking on the left icon shown here. By clicking on the right icon, you access the lexicon where you can proceed as described above.

Note: Please note that the lexicon is language-specific. The terms have to be maintained separately for each content language.

2.10 Help



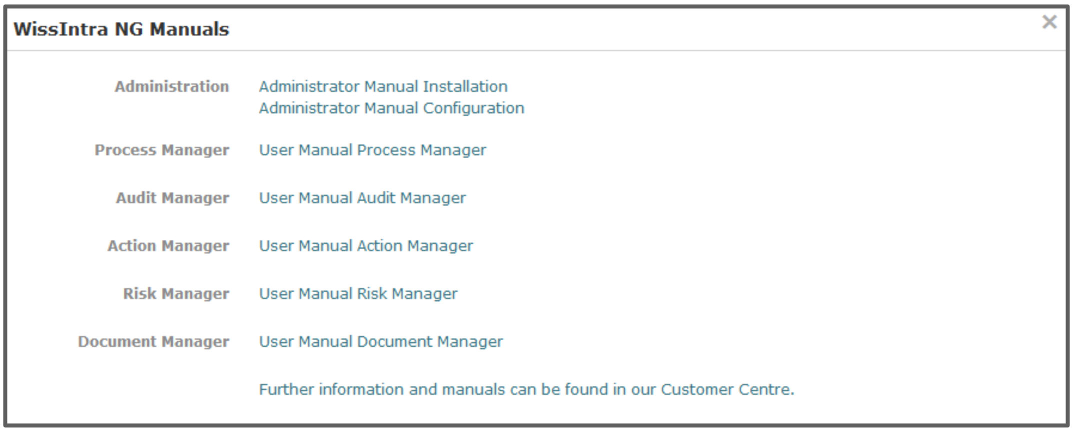
The **Help** button in the navigation bar gives you direct access to the WissIntra NG manuals as well as to information about your version and the latest version of the program.

WissIntra NG Manuals

- Navigate to **Help** and click on **WissIntra NG Manuals**.

A modal opens in which you will find all manuals for the WissIntra NG modules and for administrators.

You can find further information if you follow the link to our Customer Centre.

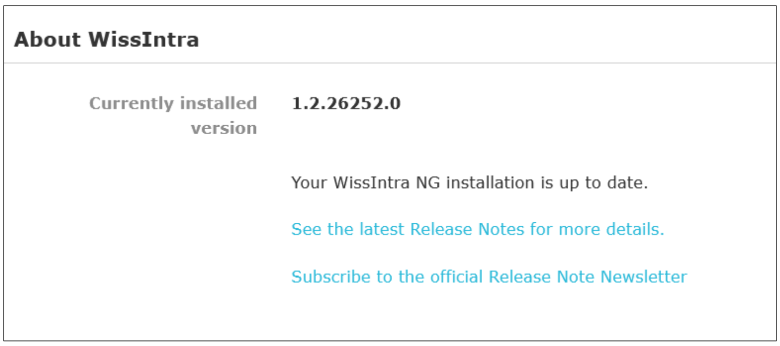


About WissIntra NG

- Navigate to **Help** and click on **About WissIntra NG**.

A modal opens with information about the currently installed version and whether newer versions of WissIntra NG are available.

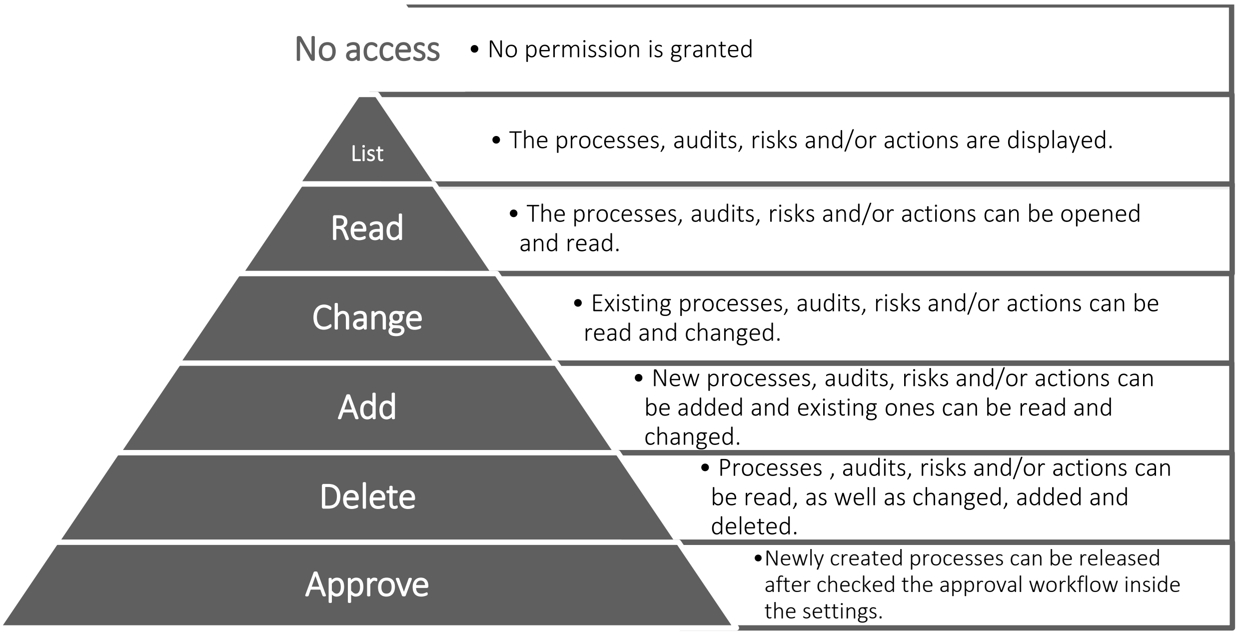
In addition, a link will take you directly to the current Release Notes. If your administrator activated **Newsletter Subscription** option in User Settings, a link will show enabling you to subscribe to the official Release Notes Newsletter.



Note: If you cannot see the link enabling subscription to the official release notes newsletter, please contact your administrator.

2.11 Permission concept

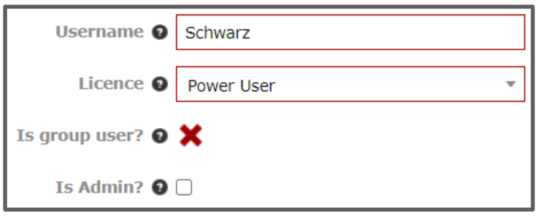
Access to WissIntra is given via permissions. There are six independent module permissions. The pyramid describes the increasing permissions from top to bottom:



Note: Permissions are assigned independently. Consider that the permission **Delete** requires at least the permission **List** and **Read**.

WissIntra NG distinguishes between Read User and Power User licence. They allow different access to the modules. As an administrator you can select the corresponding licence in the user administration and control the assignment:

If you select the **Read User**, the user is given access to WissIntra NG with a Read User licence. By selecting **Power User** he will log in with a Power User licence.



In the user administration, the user is granted a global permission without restriction by clicking the check box **Is Admin?**. The prerequisite for this is the access via Power User licence.

The following graphic gives an overview of the possible accesses:

With a read user license, the user with appropriate authorization sees the objects listed in the process manager, risk manager and the audit manager in the standard setting, and can open them.

With a Power User licence, the user can initially get all permissions.

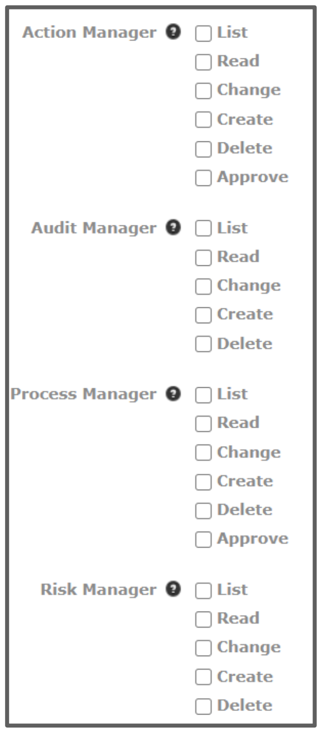
Therefore, you should develop an individual permission concept, which meets your company-specific requirements.

Note: Permissions are given by assigning users to specific roles.

By defining roles, you control the access to the modules and the locations.

To grant permissions, you first need to create a role that you can name freely. Subsequently, the required permissions are granted to this role for each module. The permissions are not ordered hierarchically and are independent from each other.

This role can be assigned to users at one or more locations. It is always assigned individually. This also applies to group and LDAP users.



Note: The permissions are granted by the administrator.

You can see two examples here for clarification:

- The role „viewer“ with permission to read within the Process Manager can for example be given to all users that have a Read User licence access to WissIntra NG and only need to read processes.
- Another role could be the „action planner“ who can create actions but cannot further edit them.

Note: If a user is responsible for a process in WissIntra NG, he can edit and delete it or create new processes in a deeper level. This is possible if the user has a Power User licence but has only received a read permission for this module.

- If you create a role „process keeper” with the permission to list, read and change within the Process Manager, the user assigned to this role can access the Process Manager and change processes. For further modules, this role has no other permission. Thus, the user has no access to other modules.
  Here the process responsible has a special permission. He can also create underlying levels and has all permissions for the child processes.
- While creating roles, please consider that not every combination of access rights is useful, like e.g. a role named “delete” with the permission to delete but without permission to read.

Note: Before migrating / installing WissIntra NG, please develop an individual permission concept that meets your requirements. If you have any questions, please do not hesitate to contact us.

Note: In the following manual, it is assumed that the respective user has the appropriate permission.

3 Short introduction Risk Manager

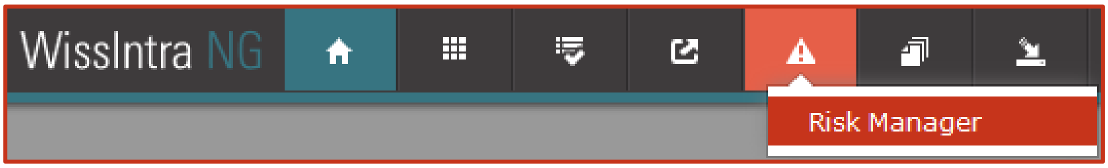
In this chapter you learn about:

- How to start the Risk Manager
- How the Risk Manager is structured
- Which settings are available for administrators

3.1 Starting the Risk Manager

- Click on the Risk Manager Icon in the navigation bar, or on the drop-down with the module name which appears on mouse-over.

The Risk Manager will be started.



3.2 Functionality and structure

In the WissIntra NG Risk Manager, you can create and evaluate risks in the risk areas and evaluation periods defined for your company.

The initial creation of a risk in the WissIntra NG Risk Manager is already the first risk evaluation for one evaluation period.

All further risk evaluations for the subsequent evaluation periods can be derived from this or subsequent evaluations.

The risk evaluations are structured within the tree structure in the sidebar, which is displayed on the left of the table.

By clicking on the first entry **Risk overview**, all risk evaluations created so far are listed in the table on the right.

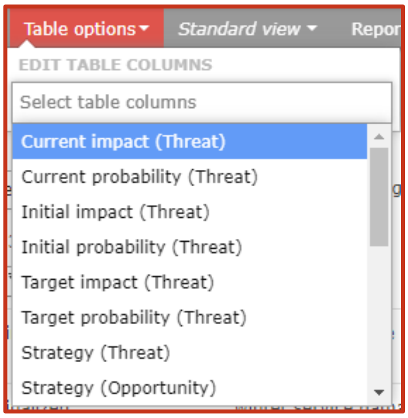
Below this, all evaluation periods created by the administrator are visible. By clicking on an evaluation period, you can view all risk evaluations for that period.

If you expand an evaluation period using the arrow, you can see all risk areas for which a risk evaluation has already been created.

You can further reduce the list of risk evaluations by clicking on a risk area below an evaluation period. This displays all risks and risk assessments for the area in the relevant period.

When the Risk Manager is started, the table with the risk evaluations of the current evaluation period is always displayed (highlighted in red).

You can use the table settings to display a large number of additional information in the overview table. Furthermore, you can use the usual filter and Excel export functions.



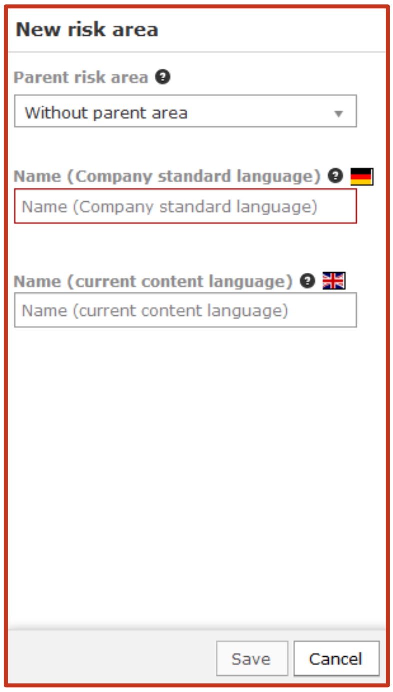
3.3 Administrator settings

Before you can create a risk in the WissIntra NG Risk Manager, your administrator must create both, the risk areas and the evaluation periods for your company.

Note: Please note that the risk areas and evaluation periods are created for all locations.

3.3.1 Risk areas

Create risk areas



- Navigate as administrator to the **Settings** and click on **Risk areas** in the **Risk Manager** section.
- Click on Create new risk area .
- Fill in the field **Name (Company standard language).**
- To create the new risk area at the top level, choose „Without parent area" in the field **Parent risk area**. If you have already created risk areas, you can use this function to select the higher-level risk area.

Note: The risk areas must always be named in the company standard language. If you have activated a different content language, however, you can also fill in the field **Name (current content language)** for the risk area. The language is indicated by the flag on the right of the field.

- Click on **Save** to create the risk area.

Note: You can find the company standard language settings in the administration area under **Languages – Master Language**.

Edit risk areas

- Click on the appropriate risk area.
- You can then make the desired changes in the opened submodal.

Delete risk areas

- Move the mouse over the desired risk area and click on the recycle bin.
- Confirm the security prompt to delete the risk area.

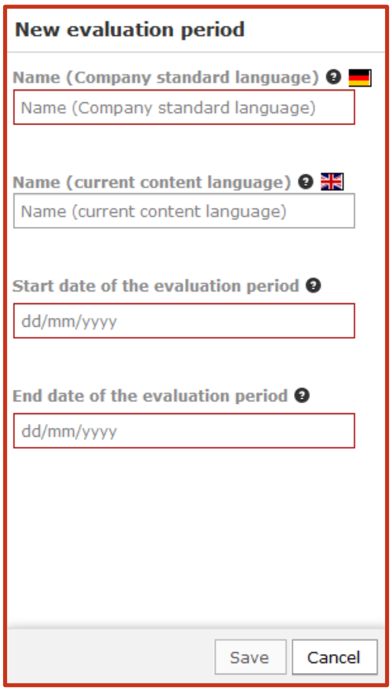
Note: Risk areas can be deleted at any time. If risks have already been created for an area, it is still displayed in the Risk Manager in the sidebar on the left after deletion. However, you can no longer select the deleted risk area for creating a new risk.

Caution: If you delete a risk area, all risk areas created below are automatically deleted!

3.3.2 Evaluation periods

Create evaluation periods

- Navigate as administrator to the **Settings** and click on **Evaluation Periods** in the **Risk Manager** section.
- Click on New evaluation period .



- Fill in the field **Name (Company standard language)**.
- Define the **Start date** and the **End date of the evaluation period**.

Note: The naming of the evaluation periods must always be done in the company standard language. If you have activated a different content language, however, you can optionally fill in the field **Name (current content language)** for the evaluation period. The language is indicated by the flag on the right.

- Click on **Save** to create the evaluation period.

Edit evaluation periods

- Click on the appropriate evaluation period.
- You can then make the desired changes in the opened submodal.

Delete evaluation periods

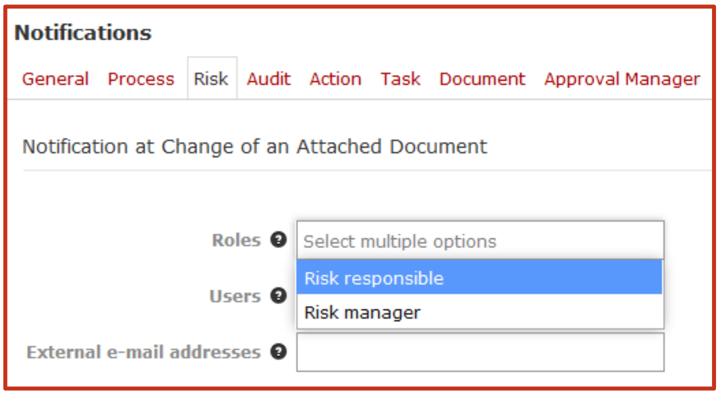
- Move the mouse over the desired evaluation period and click on the recycle bin.
- Confirm the security prompt to delete the evaluation period.

Note: You can only delete evaluation periods if there are no risks associated to them. Please consider, that evaluation periods are valid for all locations.

3.3.3 Notifications

As in other WissIntra NG modules, you can configure e-mail notifications for the Risk Manager in the administration area.

Here, you can inform certain roles, users, or external e-mail addresses about changes to a document attached to a risk evaluation.

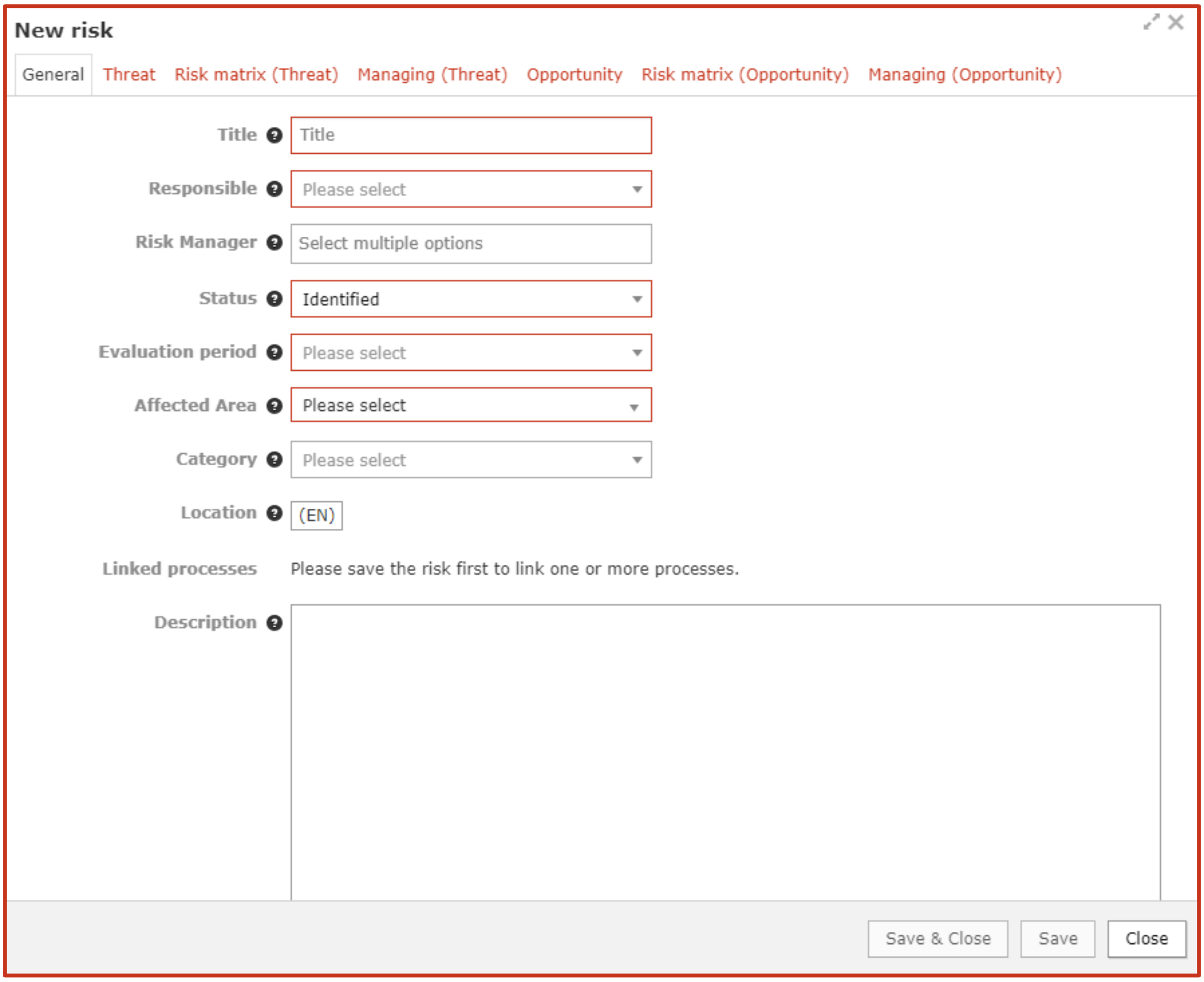


4 Risks

4.1 Create a risk

Note: Make sure that at least one risk area and one evaluation period have already been created. This information can then be used to create risks.

- In the table view, click on New .

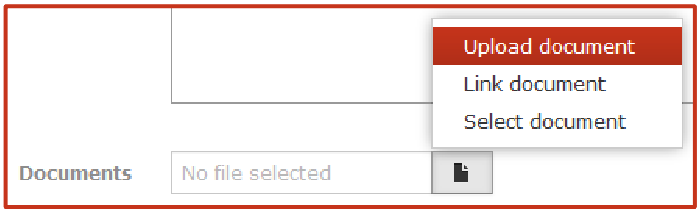


In the **General** tab, fill in the fields as described below:

- **Title**: Give the risk a comprehensible name.
- **Responsible**: Select the user who is responsible for monitoring the risk.
- **Risk Manager**: Here you can select the user who, e.g. is the central contact person for risk management and risk controlling in your company.
- **Status**: Determine the status of the risk in the relevant period.
- **Evaluation period**: Select the corresponding period in which the risk is considered and evaluated.
- **Affected Area**: Select the risk area in which the risk was identified.
- **Category**: Here you can assign the risk to a category.

- **Linked processes**: Once the risk has been saved, you can link the risk to existing processes as long as you have the appropriate licence and permission. To do this, click on Link process and select the required processes in the submodal. The linked processes are then displayed as links.

- **Description**: Here you can insert a detailed description of the risk.
- **Cause**: In this field you have the option to describe the causes of the risk in more detail.
- **Documents**: After you have saved the risk, you can also link documents.

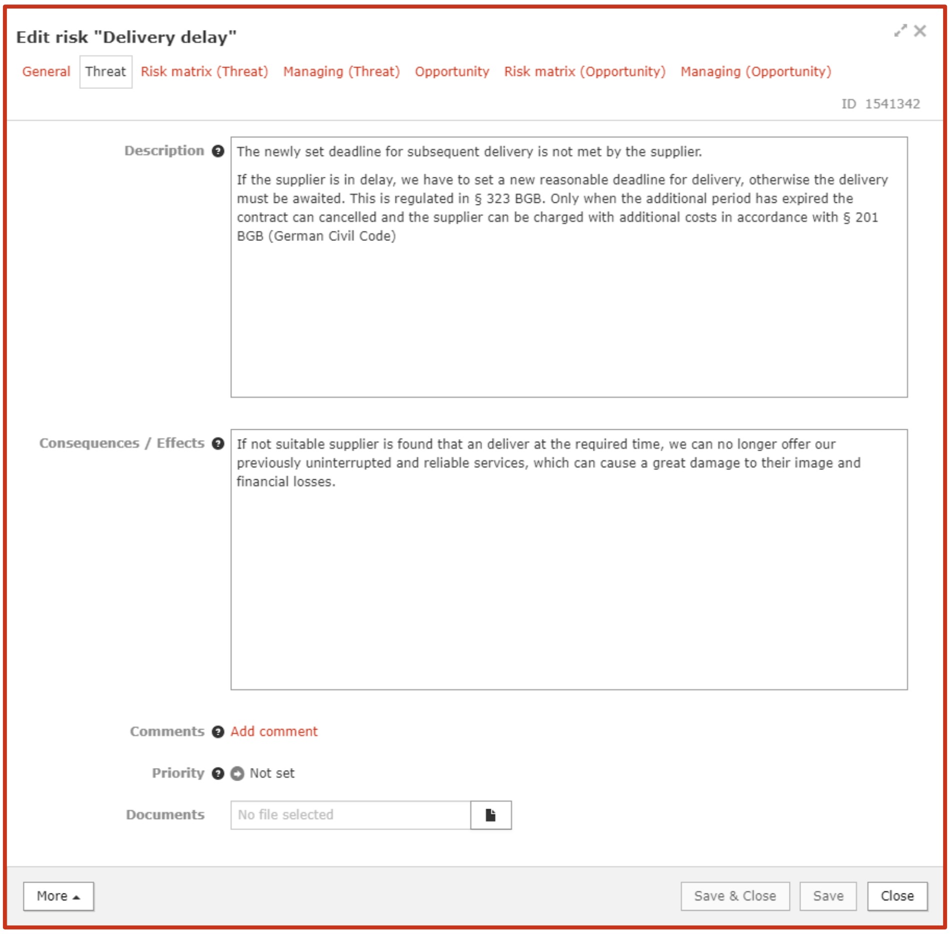


Note: It is also possible to trigger risks directly in the Process Manager. For further information please refer to chapter 5.4.1 Create risk from Turtle Analysis in the User Manual Process Manager.

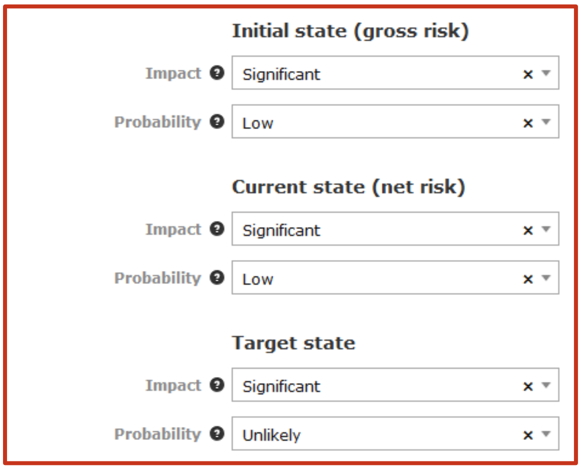
Note: If you create a risk within an evaluation period, the evaluation period of the risk is automatically preselected in the edit mask.

Threat and Opportunity

Both tabs **Threat** and **Opportunity** have the same structure. First, you can fill the **Description** of the threat or opportunity and then describe the **Consequences / Effects**. You can also add **Comments** and link **Documents**.



In the following fields, you can determine the **Impact** of the risk and **Probability** that the risk will occur in the different states (**Initial state**, **Current state** and **Target state**).

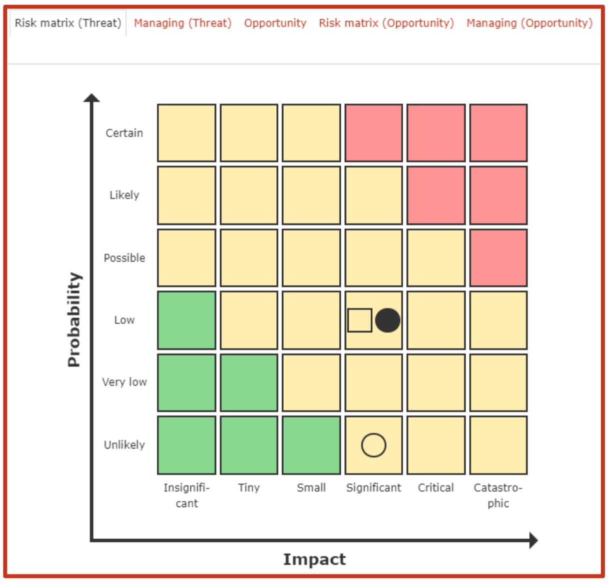


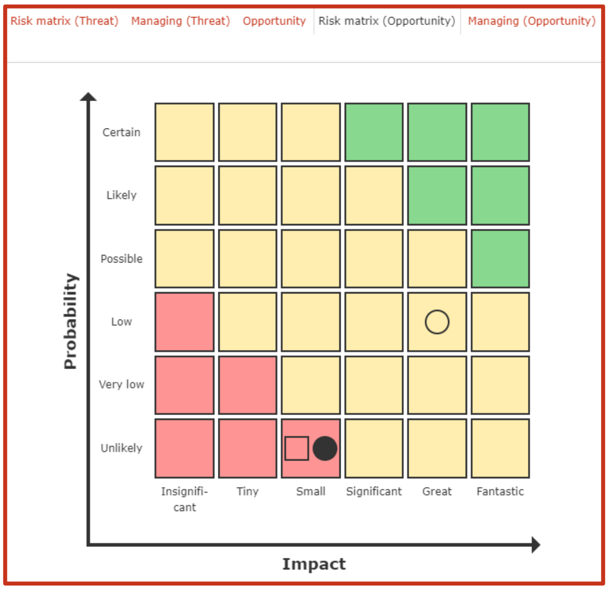
The **Priority** gets calculated automatically by WissIntra from the evaluation of the **Current state (net risk)**. Both threat and opportunity can have their own risk priority.

Note: Priorities are displayed as text together with their respective icon and can be added each to a table view as a column that is both sortable and filterable.

Risk matrix (Threat) and Risk matrix (Opportunity)

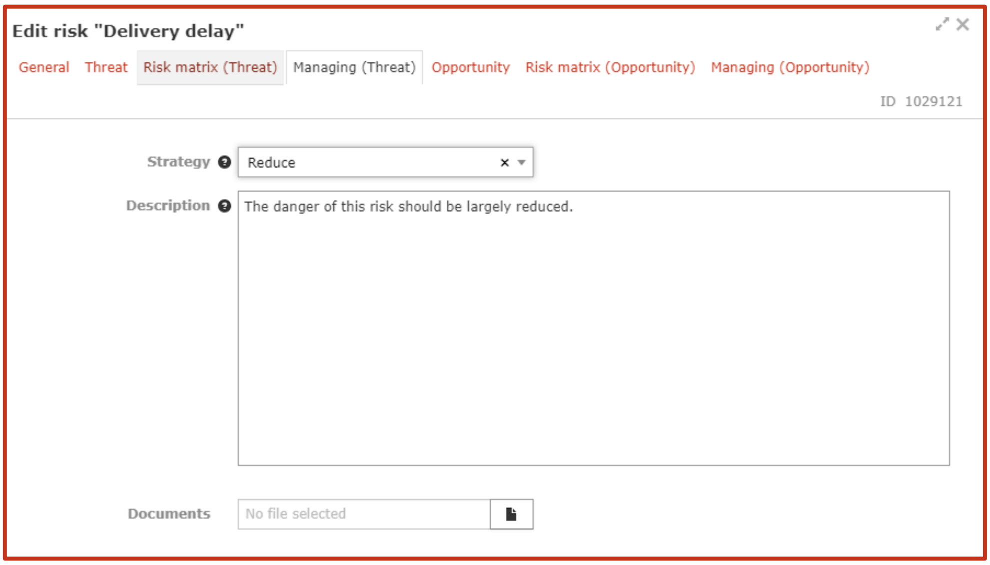
In the tabs **Risk matrix (Threat)** and **Risk matrix (Opportunity)** you can see within the risk matrix how the evaluations for the Initial state (gross risk) □ , Current state (net risk) ● and Target state ○ are arranged.





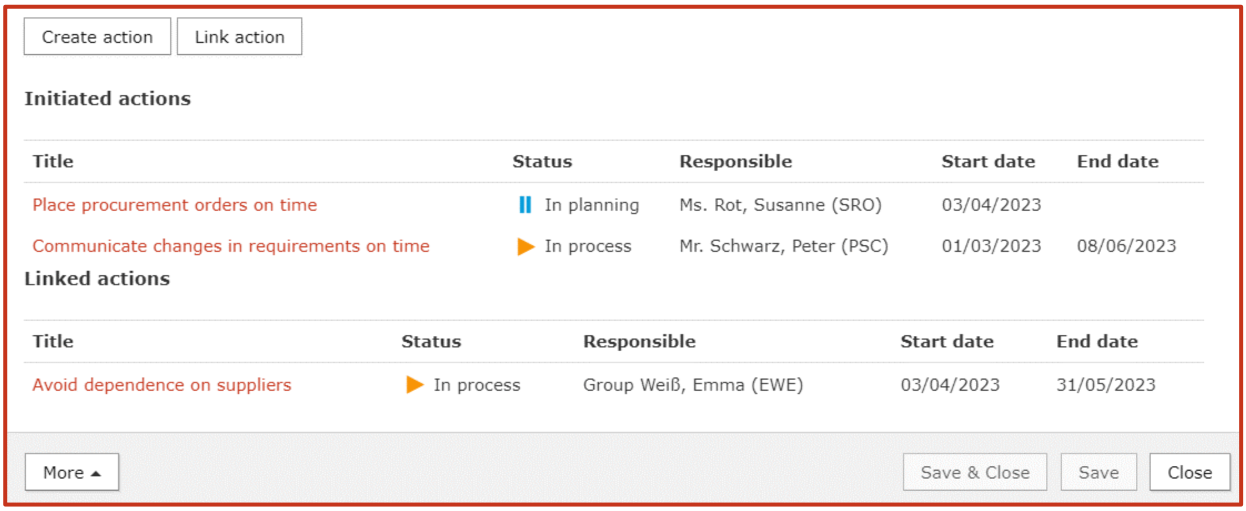
Managing (Threat) and Managing (Opportunity)

In the tabs **Managing (Threat)** and **Managing (Opportunity)** you can select the **Strategy** for handling the risk, add a **Description** for the strategy and link it to relevant **Documents**.

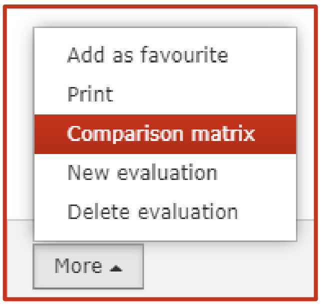


In addition, you can **Create actions** (as long as you have the appropriate licence and permission for the Action Manager) and **link** already existing **actions**.

The actions already created and already linked are listed in this tab within a table as link to the action. Furthermore, the **Status**, the **Responsible** of the action, as well as **Start date** and **End date** are also displayed.



Show comparison matrix



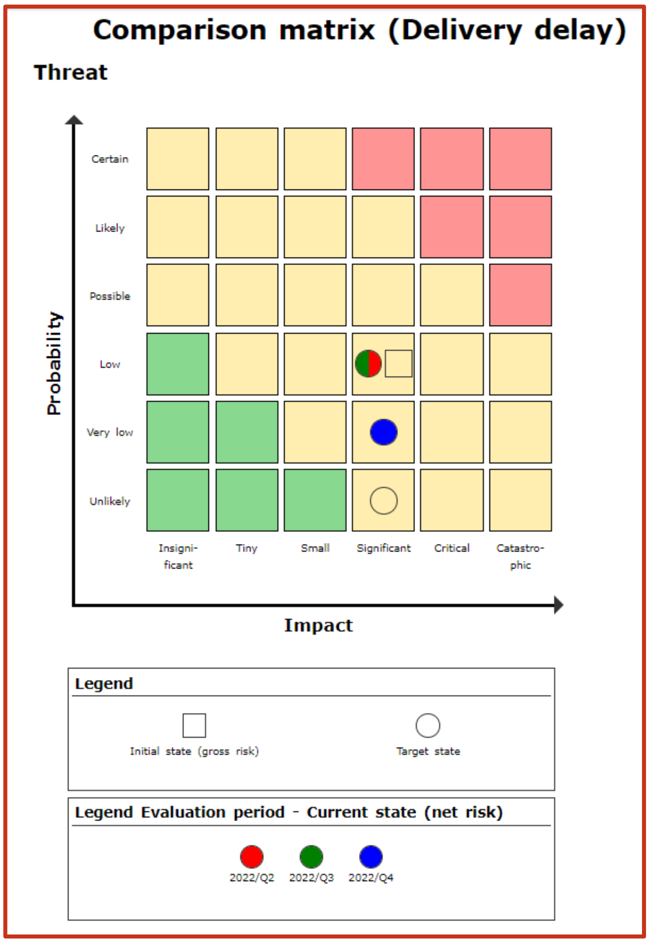
In the tabs **Risk matrix (Threat)** and **Risk matrix (Opportunity)** only the matrices for one evaluation period are displayed. Within the **Comparison matrix**, all evaluations of a risk during its evaluation periods can be displayed in one matrix for a better overview.

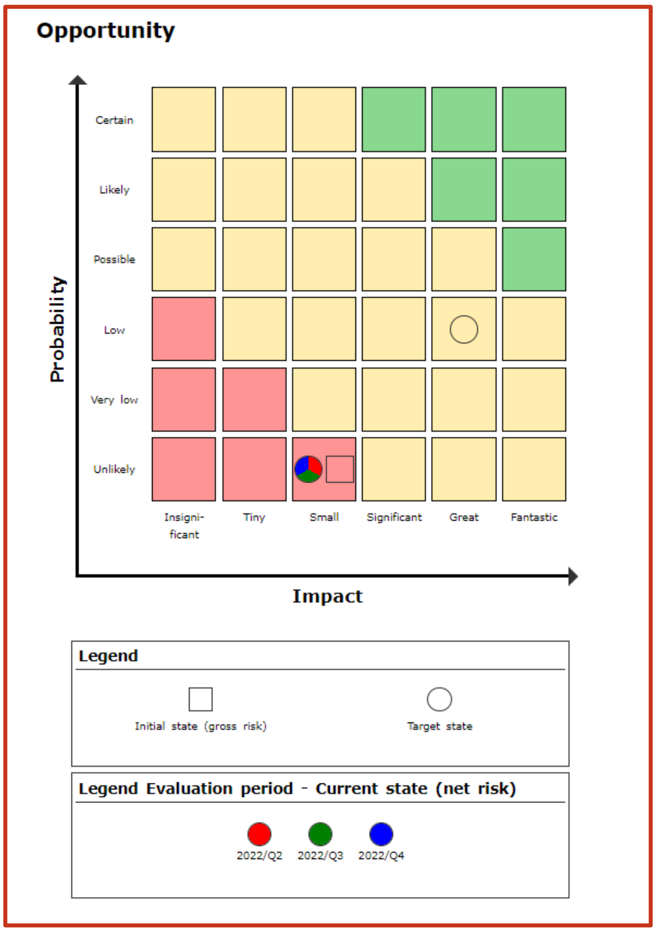
- Open the desired risk evaluation in the detail view.
- Click on More and select **Comparison matrix**.

A new tab opens, in which now multiple **Evaluation periods** of the current risk can be selected for comparison. Besides the possibility to print the comparison matrix as PDF, a preview can be shown.

The normal risk matrices for threat and opportunity are shown below each other, together with the **Initial state** and **Target state** as already displayed in the risk matrix view. Additionally, each **Current state (net risk)** of the selected evaluation periods is shown with an unequivocally coloured dot. A legend below the matrices shows the meaning of the symbols and colours.

> **Note:** If during different evaluation periods the same evaluation results happen, the dots are split into the corresponding colours.


Comparison matrix (Delivery delay)
Threat
Probability
Certain
Likely
Possible
Low
Very low
Unlikely
Insigni-
ficant
Tiny
Small
Significant
Critical
Catastro-
phic
Impact
Legend
Initial state (gross risk)
Target state
Legend Evaluation period - Current state (net risk)
2022/Q2
2022/Q3
2022/Q4


Opportunity
Probability
Certain
Likely
Possible
Low
Very low
Unlikely
Insigni-
ficant
Tiny
Small
Significant
Great
Fantastic
Impact
Legend
Initial state (gross risk)
Target state
Legend Evaluation period - Current state (net risk)
2022/Q2
2022/Q3
2022/Q4

Print the comparison matrix

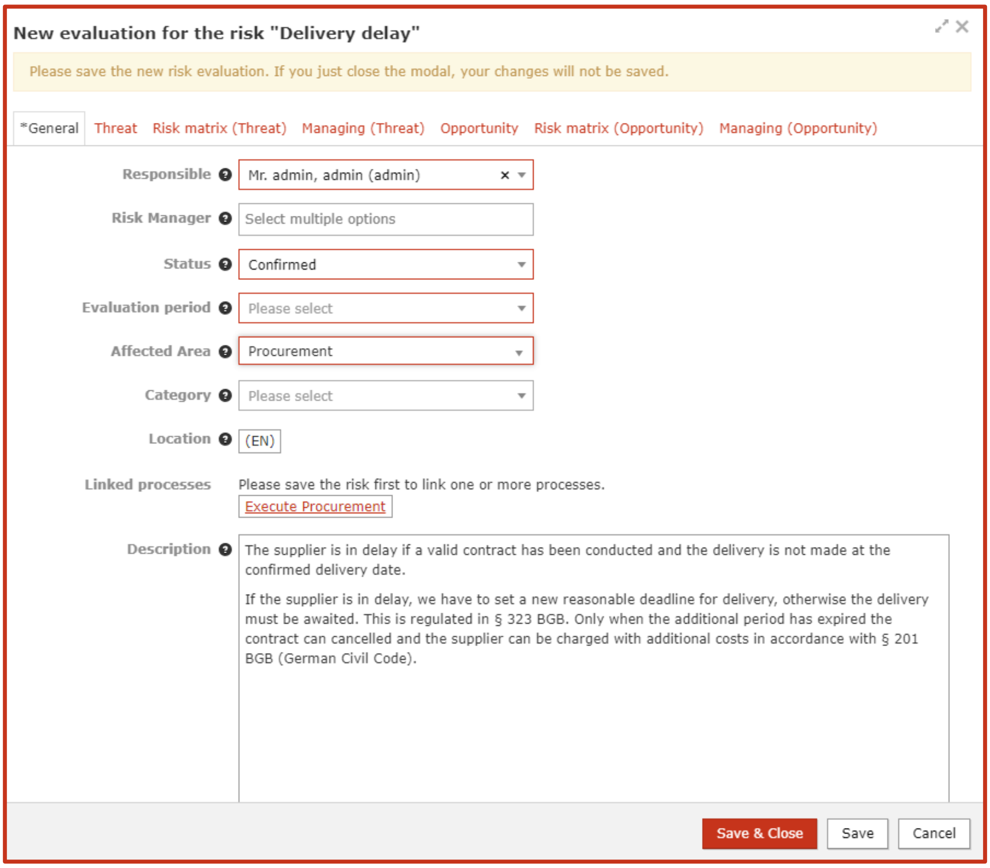
- Click on Create PDF to print the comparison matrix.

A new tab will open and the comparison matrix can be printed as PDF. Both risk matrices for threat and opportunity are shown below each other, together with the two legends displaying the meaning of symbols and colours for the selected evaluation periods.

4.2 Create new risk evaluation

Note: It is not possible to create multiple risk evaluations for the same evaluation period. Therefore, make sure that your administrator has created additional evaluation periods.

- Open the detail view of the risk for which you want to create a new evaluation.
- Click on More and select **New evaluation**.



A new modal opens, in which all contents of the risk from that you have created the new evaluation are already filled.

- Select a different **Evaluation period** and you can save the new evaluation.
- Now you can change all fields as you wish and store the information for the new evaluation.

4.3 Delete a risk or risk evaluation

You have two options for deleting a risk or risk evaluation.

Delete using the detail view

- Open the detail view of the risk or risk evaluation.
- Click on [More ▲] and select **Delete evaluation**.
- Confirm the security prompt to delete the rating.

Note: This procedure deletes only the currently opened evaluation, all other evaluations for this risk remain.

Delete in the overview table

- Select the checkbox in front of the desired risk evaluation in the table.
- Click on **Delete evaluation** and confirm the security prompt to complete the process.

	Status	Title	Evaluation period	Affected Area	Responsible	Risk manager
☑	Confirmed	Delivery delay	2016	Procurement	Mr. Schwarz, Paul (Schwarz)	
☑	Identified	Delayed procurement order	2017	Procurement	Mr. Schwarz, Paul (Schwarz)	
☐	Identified	Delivery delay	2017	Procurement	Mr. Schwarz, Paul (Schwarz)	

In this way, you can also delete several risk evaluations at the same time.

Caution: As soon as you delete the last evaluation of a risk, WissIntra NG no longer contains any information about this risk.

4.4 Print a risk evaluation

The WissIntra NG Risk Manager offers you the possibility to print a risk evaluation with all tabs as PDF to get a general overview of the risk.

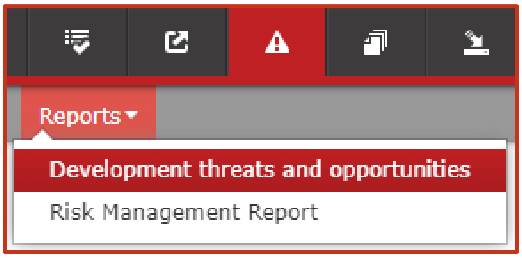
Proceed as follows:

- Open the desired risk evaluation in the detail view.
- Navigate to [More ▲] and select **Print**

A new tab will open where you will find the print of the risk evaluation. The information of the individual tabs are listed in separate pages.

5 Reports

5.1 Development threats and opportunities



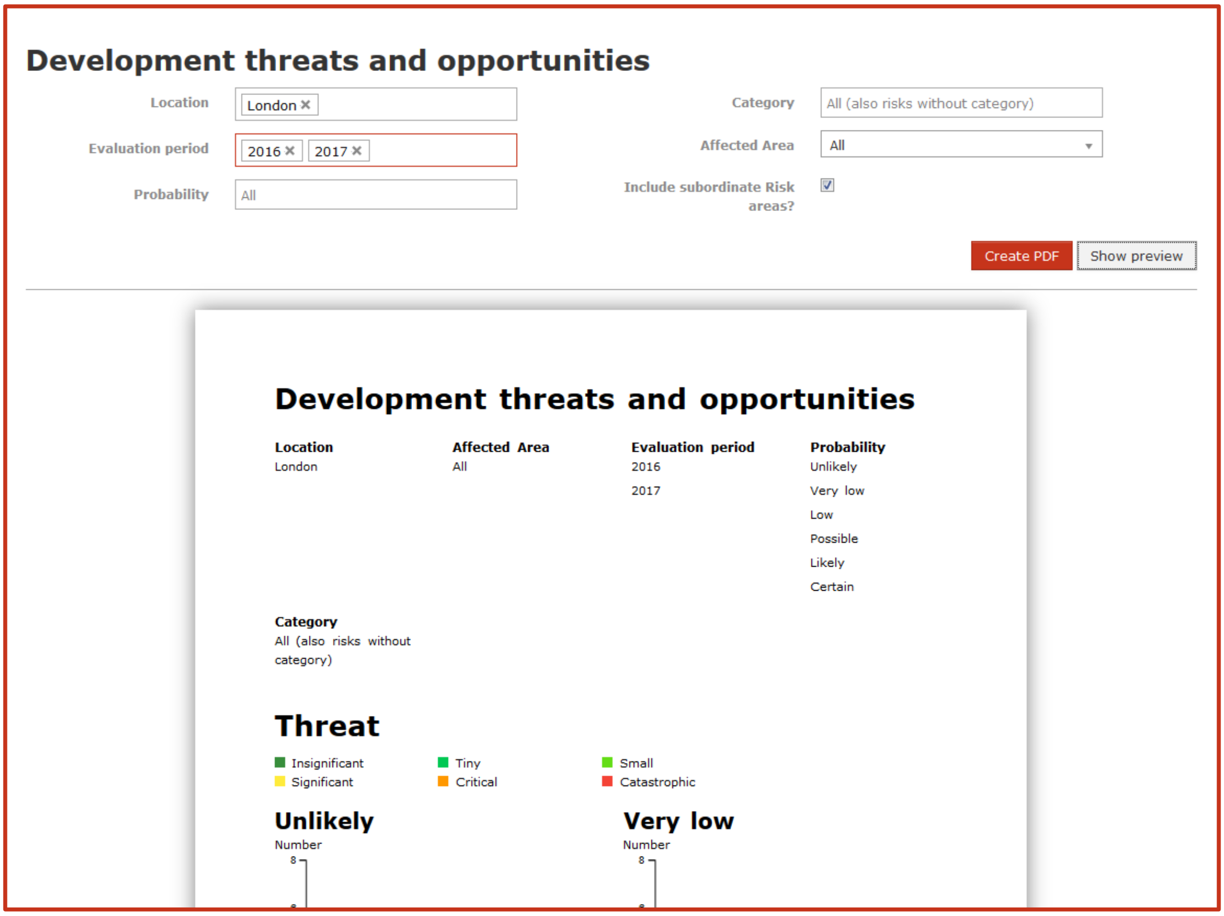
You can use this report to display the threats and opportunities of the risk evaluations created for the **Current state (net risk)** in a clear and concise way.

For each probability you will find a chart with the number of associated risk evaluations where you can see the selected impact based on the colour.

You can use filters to restrict the displayed contents of the report.

- Select at least one **Evaluation period**.
- In the filters **Location**, **Probability**, **Category** and **Affected Area** you can select the desired values from the existing entries.
  If you leave these fields empty, all existing entries are automatically taken into account for the report.
- You can use the checkbox under the filter **Affected Area** to decide whether or not to **include subordinate risk areas**.

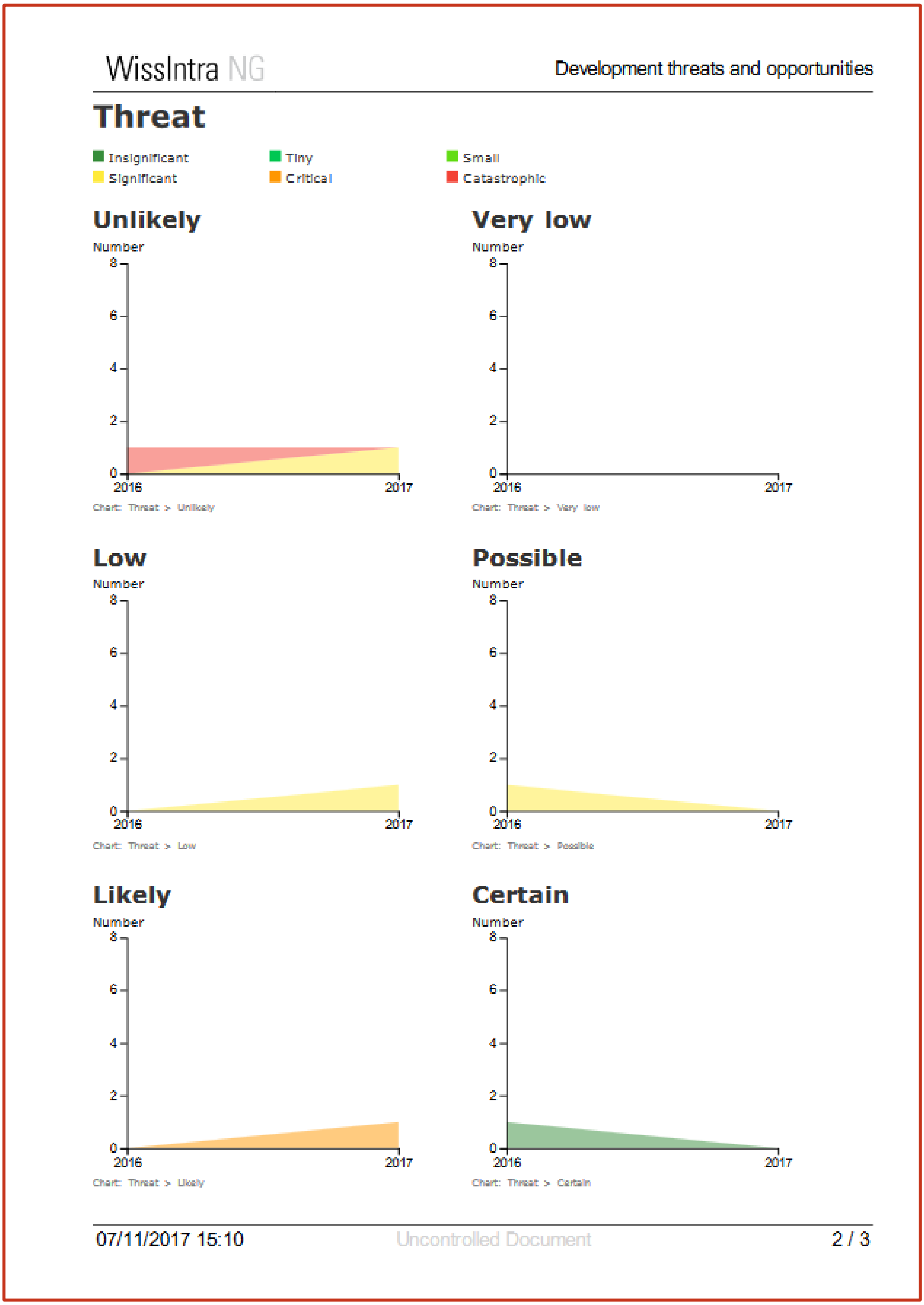
- Click on Show preview to display a preview of the report.



- Click on Create PDF to generate the report as PDF in a new tab.

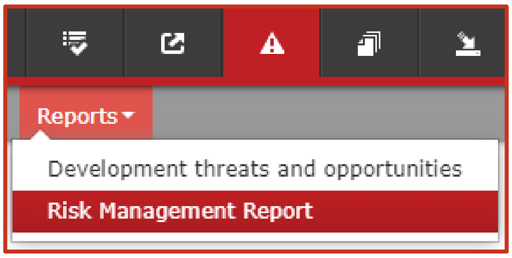
The first page of the PDF contains all the filters you have selected.

The following pages display the threats and opportunity graphs. This enables you to assess and compare all threats and opportunities with the probabilities and impacts you have selected at a glance.

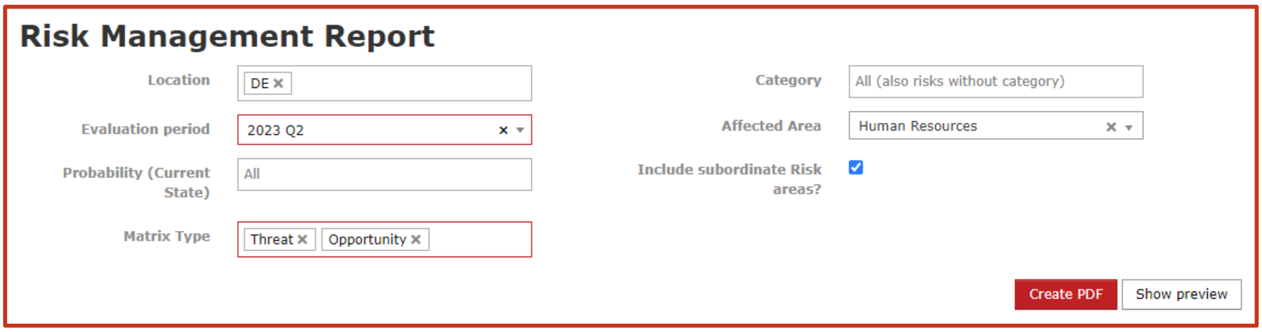


5.2 Risk Management Report

You can use this risk management report to display all risk matrices during a selected evaluation period.

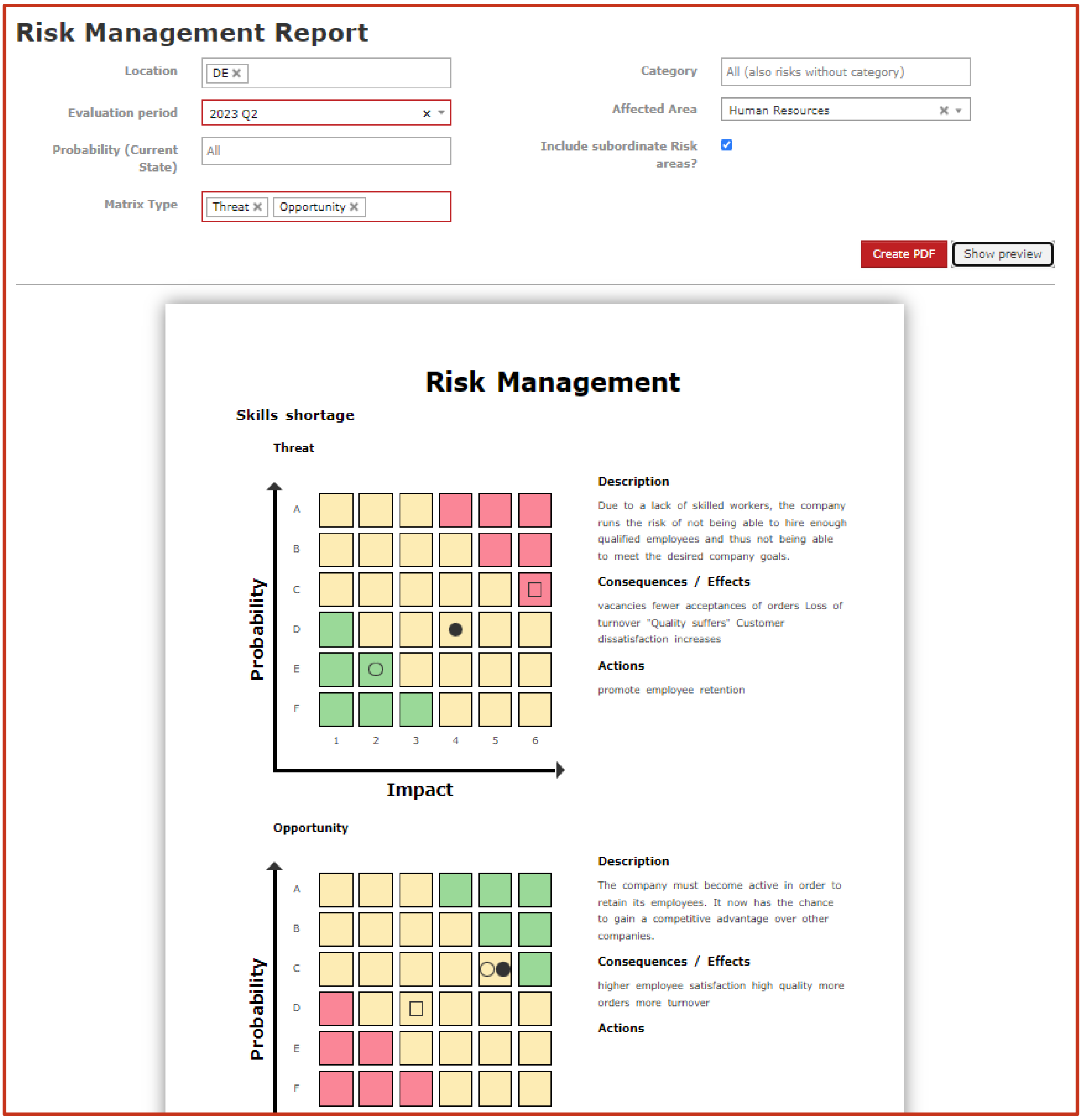


The filters allow you to define the contents of the report. The red-bordered filters are mandatory fields and must be filled in.



- Select at least one **Evaluation period**.
- Use the Matrix Type filter to define whether you want to display the Threat and/ or Opportunities area.
- In the filters **Location**, **Probability (Current State)**, **Category** and **Affected Area** you can select the desired values from the existing entries.
  If you leave these fields empty, all existing entries are automatically taken into account for the report.
- You can use the checkbox under the filter **Affected Area** to decide whether or not to **include subordinate risk areas**.

- Click on Show preview to display a preview of the report.



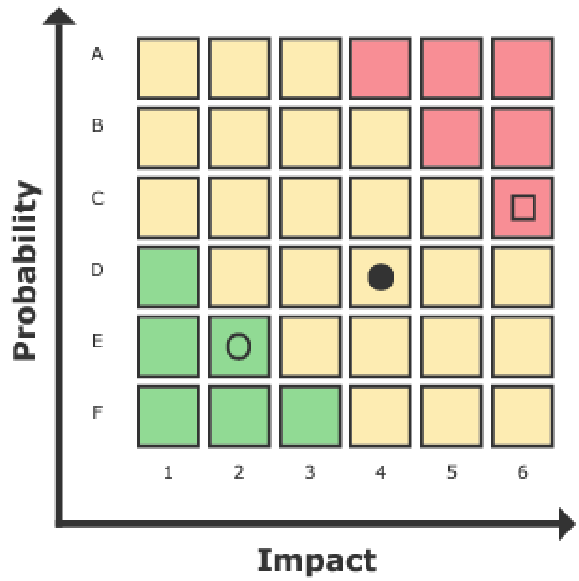
- Click on **Create PDF** to generate the report as PDF in a new tab.

WissIntra NG — Risk Management

Risk Management

Skills shortage

Threat



Description

Due to a lack of skilled workers, the company runs the risk of not being able to hire enough qualified employees and thus not being able to meet the desired company goals.

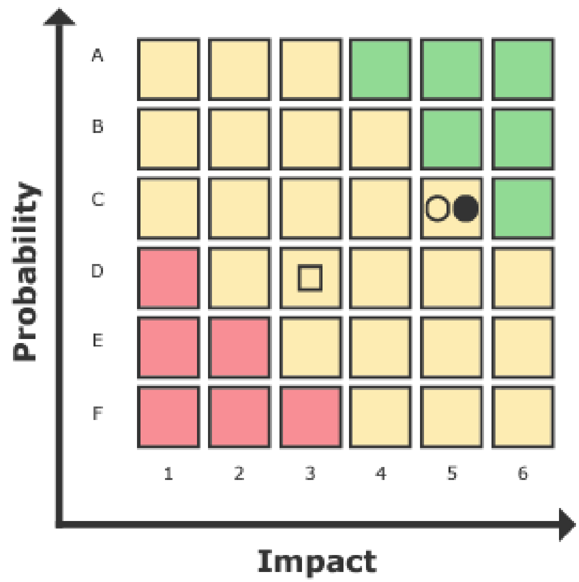
Consequences / Effects

vacancies fewer acceptances of orders Loss of turnover "Quality suffers" Customer dissatisfaction increases

Actions

promote employee retention

Opportunity



Description

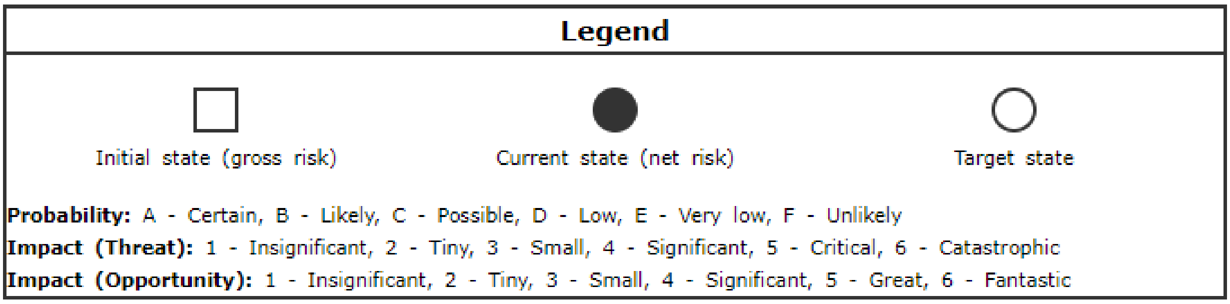
The company must become active in order to retain its employees. It now has the chance to gain a competitive advantage over other companies.

Consequences / Effects

higher employee satisfaction high quality more orders more turnover

Actions

At the end of the report there is a legend regarding the matrix labelling.



6 Keyboard Shortcuts

General	
CTRL + SHIFT + UP	Navigates to the main navigation
CTRL + SHIFT + DOWN	Navigates to the breadcrumbs (mini-view of the process card)
CTRL + SHIFT + LEFT	Navigates to the first navigation sidebar entry
CTRL + SHIFT + RIGHT	Navigates to the main content (first process card or first table entry)

Modal	
CTRL + E	Opens Modal
CTRL + S	Saves the date in the modal
ESC	Closes the Edit / Detail modal
CTRL + ALT + 1	Opens the first tab
CTRL + ALT + 2	Opens the second tab
And so on.	

Depending on what has been activated, the navigation buttons have a different function:

Main navigation	
LEFT	Previous Module
RIGHT	Next Module
ENTER	Enters the module

Table	
UP	Cursor jumps back one line
DOWN	Cursor jumps to the next line
LEFT	Navigates to previous page
RIGHT	Navigates to next page
ENTER	Opens the modal
SPACE BAR	Opens the checkbox
ESC	Deactivates all checkboxes

Matrix/Function lane (matrix itself)	
UP	Navigates to the overlying process card
DOWN	Navigates to the underlying process card
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level downwards
ESC	Undo the move

Matrix/Function lane (Breadcrumbs)	
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level upwards

Treeview	
UP	Cursor jumps one element higher
DOWN	Cursor jumps one element lower
LEFT	Folds a branch
RIGHT	Unfolds a branch
ENTER	Opens or select the entry (modal opens)

7 FAQ – Frequently Asked Questions

In this chapter you will find answers to frequently asked question when working with WissIntra NG:

Why do some hyperlinks from MS Office documents not work correctly?

This problem may occur if the name of the page from which you want to create a hyperlink contains a hash character (#).

When you right-click a hyperlink in a Word document and use the Insert Hyperlink option, the hash sign is displayed incorrectly and the inserted link cannot be opened correctly.

Note: The hash sign (#) is a valid character when using file names, but is not accepted for hyperlinks in MS Office documents.

To avoid this problem, use on of the following methods:

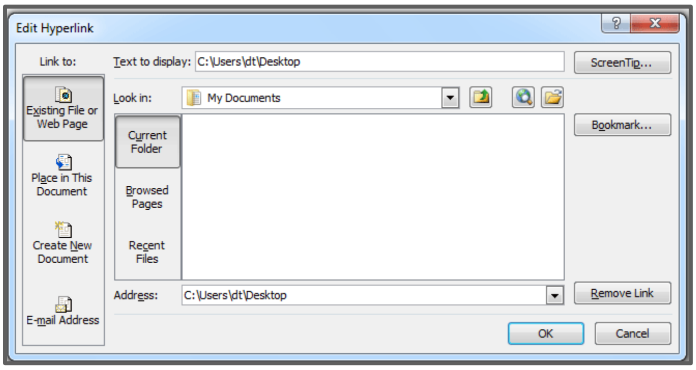
- Use CTRL + C to copy the address of the hyperlink and insert it into the Office document.
- Press **Enter** to automatically generate a link.

Or

- Right-click the corrupt link in the Office document.
- Click on **Edit Hyperlink**.

The following window will open:

- Insert the correct address of the hyperlink and click OK.



Note: For more information about this MS Office issue, visit Microsoft Support at: https://support.microsoft.com/de-de/kb/202261

The same problem can appear when creating a PDF with the integrated PDF tool in Office (PDF / XPS document). Again, the hyperlink may be displayed incorrectly and cannot be opened correctly.

To avoid this problem, we recommend using an alternative external tool for creating PDFs. For further questions about this issue, please contact Microsoft Support.

When opening a document, a login window appears. How can I avoid that?

If you are using a version of Microsoft Office 2010 or older and open WissIntra NG with the Internet Explorer, it may happen that a login window appears when you open Office documents in the Document Manager or within a modal, prompting you to log in with your Windows user data.

To solve this problem, please contact your administrator. **Chapter 4.3** in the **Administrator Manual Configuration** describes how to bypass this behaviour.

What is the difference between modules and modals?

The various software applications, such as the Process Manager or the Audit Manager are called modules.

The dialog windows are called modals where you can navigate in tabs and insert input.

8 Customer Support and Service Desk

Follow the instruction in this manual to make the best preparations for working with WissIntra NG. Should you still have any questions and you need support from our service team, please contact us under consideration of your service level.

We would be pleased to receive your feedback and suggestions.

We wish you a lot of success and pleasure working with WissIntra NG!

Customer Support

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Service Desk

E-Mail: **Servicedesk@WissIntra.de**

Tel: +49 711 578813 -13

Monday to Friday from 9am – 12am and 1pm – 5pm (CET)

Note: Before you contact the Service Desk, please contact your internal WissIntra NG contact person to learn more about your service level and the resulting contract terms.

Note: Please let us know your current program version with each contact. You will find this on each WissIntra NG page at the lower right corner.

WissIntra Online Support via pcvisit:

With pcvisit, we switch directly to your screen.

This is how it works:

- Make an online support appointment.
- Download the guest module for pcvisit.
- Follow the step by step instructions.

For detailed instructions, please visit:

https://www.kuk-is.de/files/kuk-is/userfiles/Kundenzentrum/Support/kk_information_services_Anleitung_pc_visit.pdf

Our service staff will be available at any time to answer your questions.

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