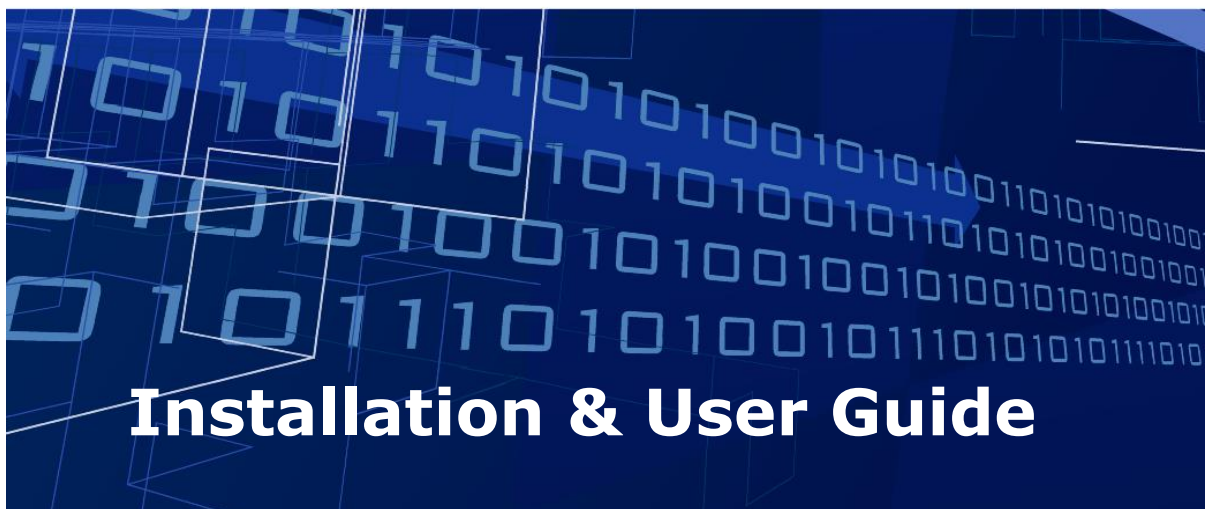




SharePoint Risk Management Chart
web part



Installation & User Guide



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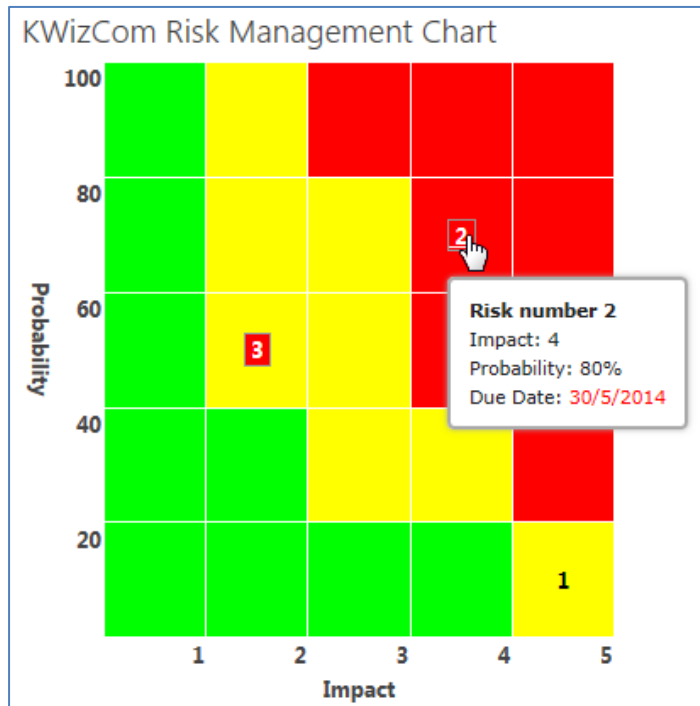


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Introduction

SharePoint Risk Management Chart web part visually shows projects' risks on a probability-impact matrix, based on the PMBOK risk management methodology.



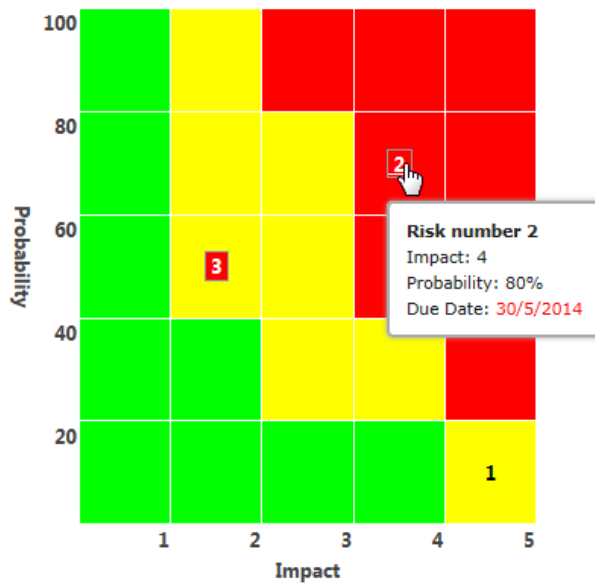
This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product overview
- Installation guide
- Component activation
- User Guide
- Administrator guide

Overview

Easily visualize, identify and manage your project's risks!

KWizCom Risk Management Chart



This KWizCom solution includes 2 modules:

1. **Risk Management list template** – use this template to create Risks lists where you can define your project's risks and update your mitigation plans (optional, you can use your own risk list as well).
2. **Risk Management Chart web part** – this web part connects to a risk list or to aggregated risks from multiple lists/sites and displays those risks on a probability-impact configurable chart.



Key Features & Benefits

| Feature | Risk Management Chart web part | |
|---|--------------------------------|------|
| | STD. | PRO. |
| Support SharePoint 2010/2013/2016 Server/Foundation | ✓ | ✓ |
| Displays risks in a probability-impact chart | ✓ | ✓ |
| Risks list template where you can manage and update the risks | ✓ | ✓ |
| Customizable Risk chart scales | ✓ | ✓ |
| Customizable Risk chart colors | ✓ | ✓ |
| Configurable on-screen notifications about upcoming risks | ✓ | ✓ |
| Display "Risk Path" chart showing changes in a selected risk's probability and impact over time | | ✓ |
| Aggregate risks from multiple project risk lists | | ✓ |
| Allow end-user to filter risks using configurable filtering form | | ✓ |



Installation

Software prerequisites

Server Requirements

1. SharePoint Server/Foundation 2010/2013/2016/2016

Client PC Requirements

1. Windows Windows 7+
2. Microsoft Internet Explorer 8+ / Mozilla Firefox (Latest version) / Google Chrome (Latest version)

Installation Procedure

SharePoint 2010/2013/2016

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.
This will start the KWizCom web installer

Notes:

- The PRO. edition includes also the KWizCom List Filter Plus web part. If you are evaluating/purchased the Pro. edition please make sure you install this add-on as well.
- The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

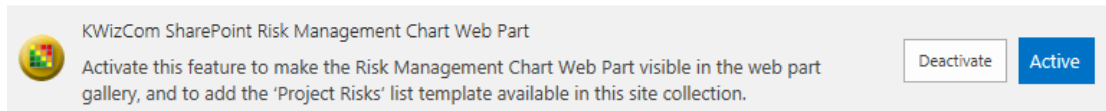
3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the “Download only” option (3rd page in the installer’s wizard), OR download the product WSP packages by clicking their links under the “Download Installable Packages” section.

After you manually download and unzip the product’s WSP packages or use the web installer to download the product’s packages, install the KWizCom product by simply running the “SP-WSPInstaller” powershell script.

Post Installation

SharePoint 2010/2013/2016

1. A new “KWizCom Risk Management Chart” is available in the S.C feature gallery:



Activate this feature in site collections where you want the Risk Management Chart web part to be available.

Un-Installation Procedure

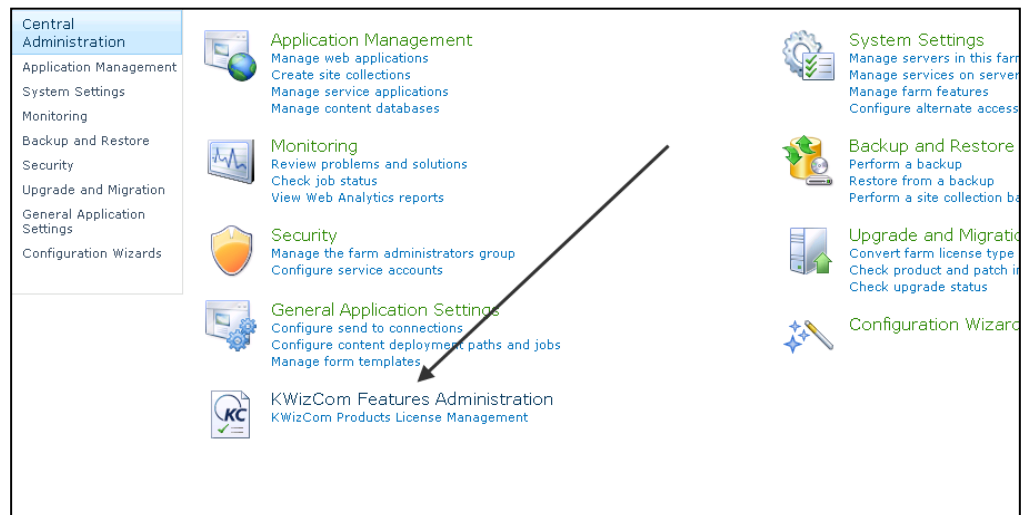
SharePoint 2010/2013/2016

1. Retract the solution using SharePoint central admin or by using stsadm/powershell command line.

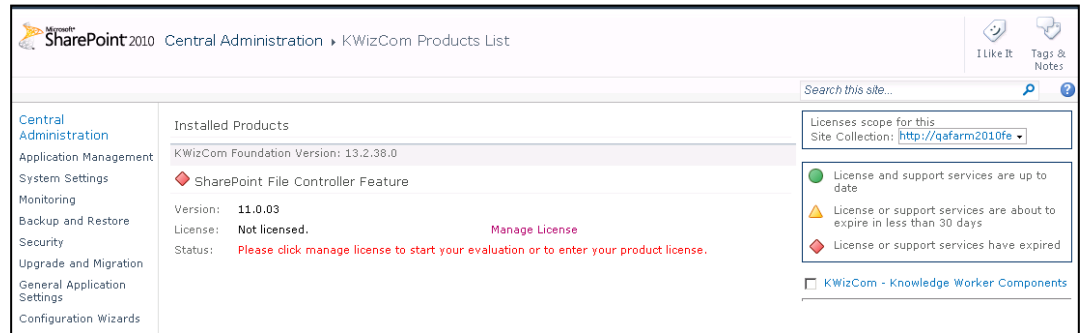
Component Activation

SharePoint 2010/2013/2016

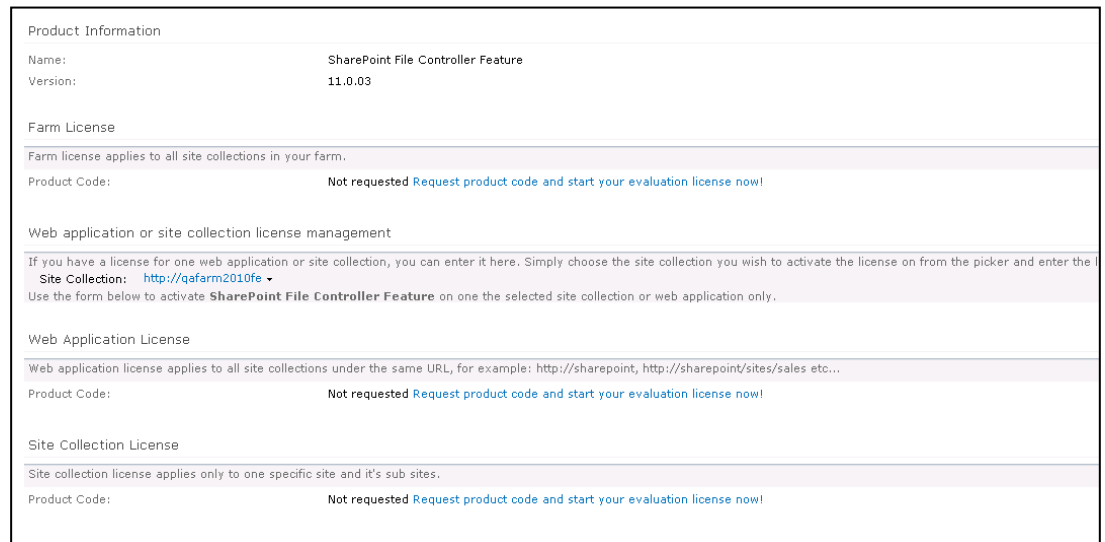
1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
 - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:



- b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:



- c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



- d. Click on the “Request product code and start your evaluation now” link, under the required license type (Farm, Web application, Site Collection).
A product code will be generated and displayed as in the following screenshot:

Product Information

Name: SharePoint File Controller Feature
Version: 11.0.03

Farm License

Farm license applies to all site collections in your farm.

Product Code: TNWV07J8[07QZMJUVEVHJ8MMEVH7QMM57885VVV53VM-.5VQMUM.MM]MVNXJX [Copy to clipboard](#)

Activation Code: [Activate now!](#)

License Notifications: [Update](#)
Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email address, separate each email address with a comma.

License type: Evaluation
Expiration: Thursday, November 18, 2010

Web application or site collection license management

If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from the list below.

Site Collection: <http://qafarm2010fe> ▼

Use the form below to activate **SharePoint File Controller Feature** on one the selected site collection or web application only.

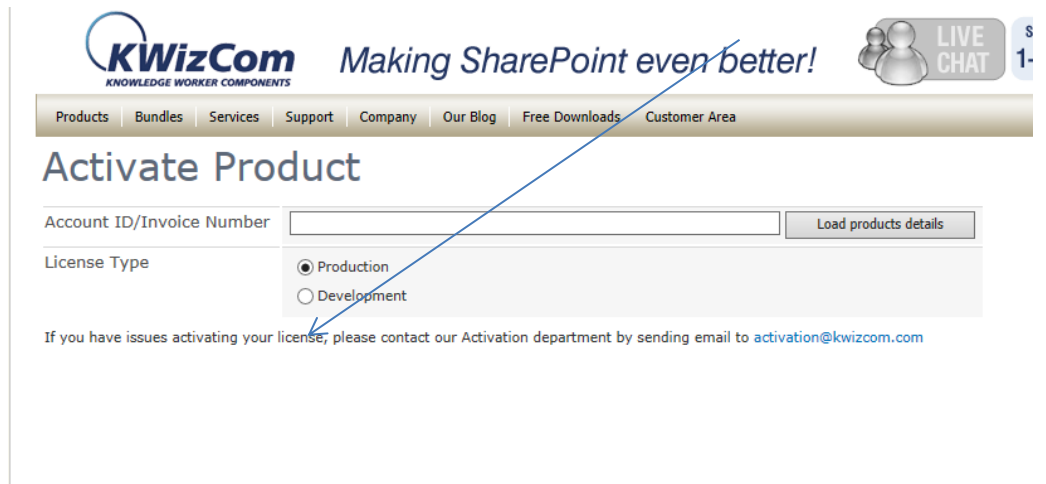
Web Application License

Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...

Product Code: **Not requested** [Request product code and start your evaluation license now!](#)

Site Collection License

- e. Copy the product code.
- f. Browse the Product Activation Request page on KWizCom's web site: <http://www.kwizcom.com/ProductReg>.



Account ID/Invoice Number: [Load products details](#)

License Type: Production Development

If you have issues activating your license, please contact our Activation department by sending email to activation@kwizcom.com

Fill-out and submit the form.

- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the "Activation Code" field in the product's license management page and click "Activate now!"

link.

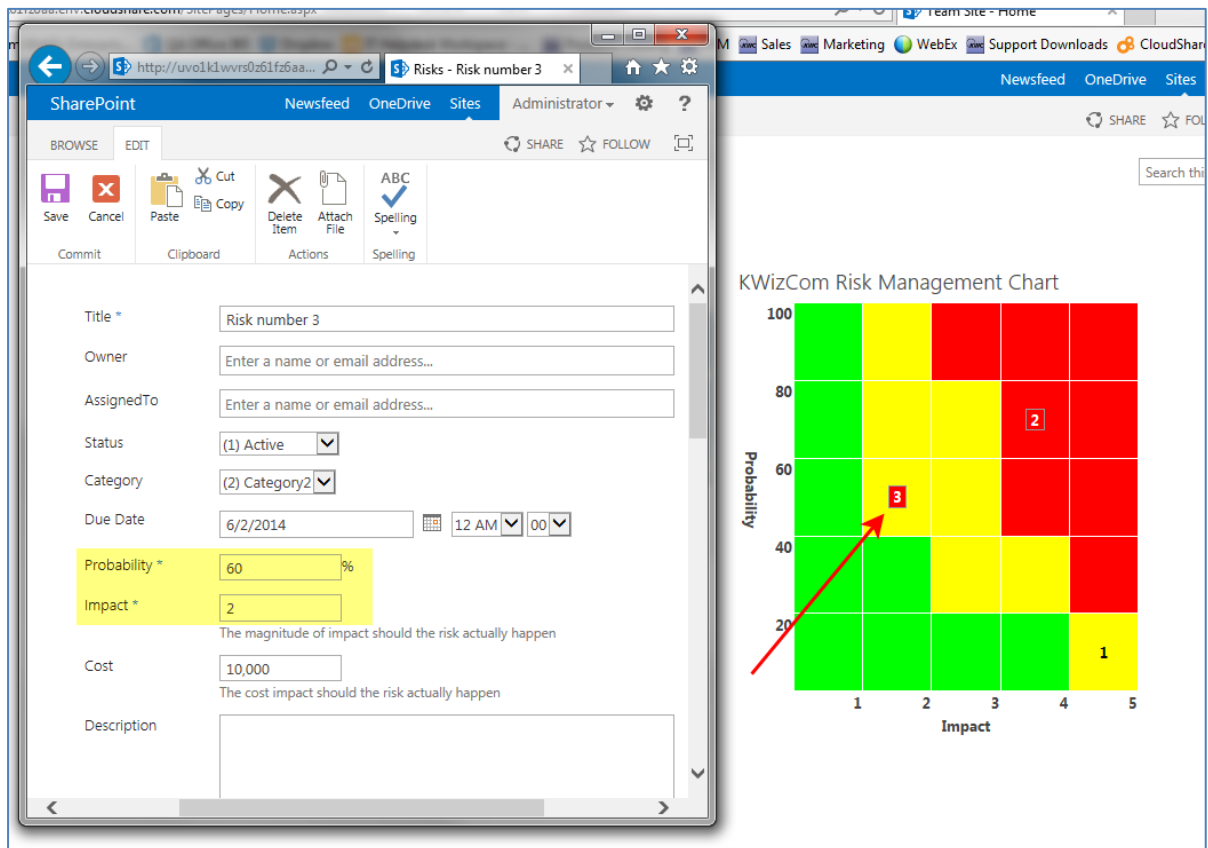
| | |
|---|--|
| Product Information | |
| Name: | SharePoint File Controller Feature |
| Version: | 11.0.03 |
| Farm License | |
| Farm license applies to all site collections in your farm. | |
| Product Code: | TNWW07J8[07QZMJUVEVHJ8MMEVHPQMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX Copy to clipboard |
| Activation Code: | <input type="text"/> Activate now! |
| License Notifications: | <input type="text"/> Update |
| Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one | |
| License type: | Evaluation |
| Expiration: | Thursday, November 18, 2010 |
| Web application or site collection license management | |
| If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license | |
| Site Collection: | http://qafarm2010fe ▾ |
| Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only. | |
| Web Application License | |
| Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc... | |
| Product Code: | Not requested Request product code and start your evaluation license now! |
| Site Collection License | |
| Site collection license applies only to one specific site and it's sub sites. | |

That's it! Your product is now fully activated.

User Guide

Risk Management Chart basic features – Standard edition

The Risk Management Chart web part retrieves Risks information from a Risks list, and displays those risks in a graphic colored matrix display. The graphic matrix has an **Impact** axis and a **Probability** axis. When you add a new risk to the risks list, it will be shown accordingly on the Risk Management Chart.



The screenshot shows a SharePoint form for adding a risk. The form fields are as follows:

- Title: Risk number 3
- Owner: Enter a name or email address...
- Assigned To: Enter a name or email address...
- Status: (1) Active
- Category: (2) Category2
- Due Date: 6/2/2014, 12 AM, 00
- Probability: 60%
- Impact: 2
- Cost: 10,000
- Description: (empty)

The Risk Management Chart is a 5x5 matrix with Impact on the x-axis (1-5) and Probability on the y-axis (20-100). The matrix is color-coded as follows:

| Probability \ Impact | 1 | 2 | 3 | 4 | 5 |
|----------------------|-------|--------|--------|--------|--------|
| 100 | Green | Yellow | Red | Red | Red |
| 80 | Green | Yellow | Yellow | Red | Red |
| 60 | Green | Green | Yellow | Yellow | Red |
| 40 | Green | Green | Green | Yellow | Red |
| 20 | Green | Green | Green | Green | Yellow |

Three risks are marked on the chart:

- Risk 1: Yellow cell at Impact 5, Probability 20.
- Risk 2: Red cell at Impact 4, Probability 70.
- Risk 3: Green cell at Impact 2, Probability 50.

- The matrix 3 (configurable) colors representing the risks level (exposure):
 - **Green** – Risk is acceptable and mitigation is optional

- **Yellow** – Risk is undesirable and mitigation is required within specified period (12 months for example).
- **Red** – Risk is unacceptable and mitigation is required within a short specified period (6 months for example).

Looking at the risks displayed in the matrix you will see whatever the administrator configured to be displayed for each risk. In the screenshot below that web part was configured to display the risk ID and below the project name – both are columns in the Risks list.

When you hover over a risk, you will see a tooltip with the risk's details:



Risks have also a Due Date property (the expected mitigation date).

When a risk is due in X days (this is a configurable web part property), it will be marked with a red background as displayed for risk no. 3 above.

Risk Path Chart (Pro. edition)

The Risk Path chart displays a selected risk's saved instances over time, on the same probability vs Impact chart. This enables analysing how a risk's probability/Impact was changed during the project in order to understand if the mitigation plan is working as expected etc.

When you click a risk on the chart, the "Risk Path" chart will open in a popup window as appears in the following screenshot:



In this example, the selected risk was saved twice:

The 1st instance has Impact of 4, and Probability=20%

The 2nd instance (see screenshot below), was updated on March-30, has Impact of 10, and Probability=10%.

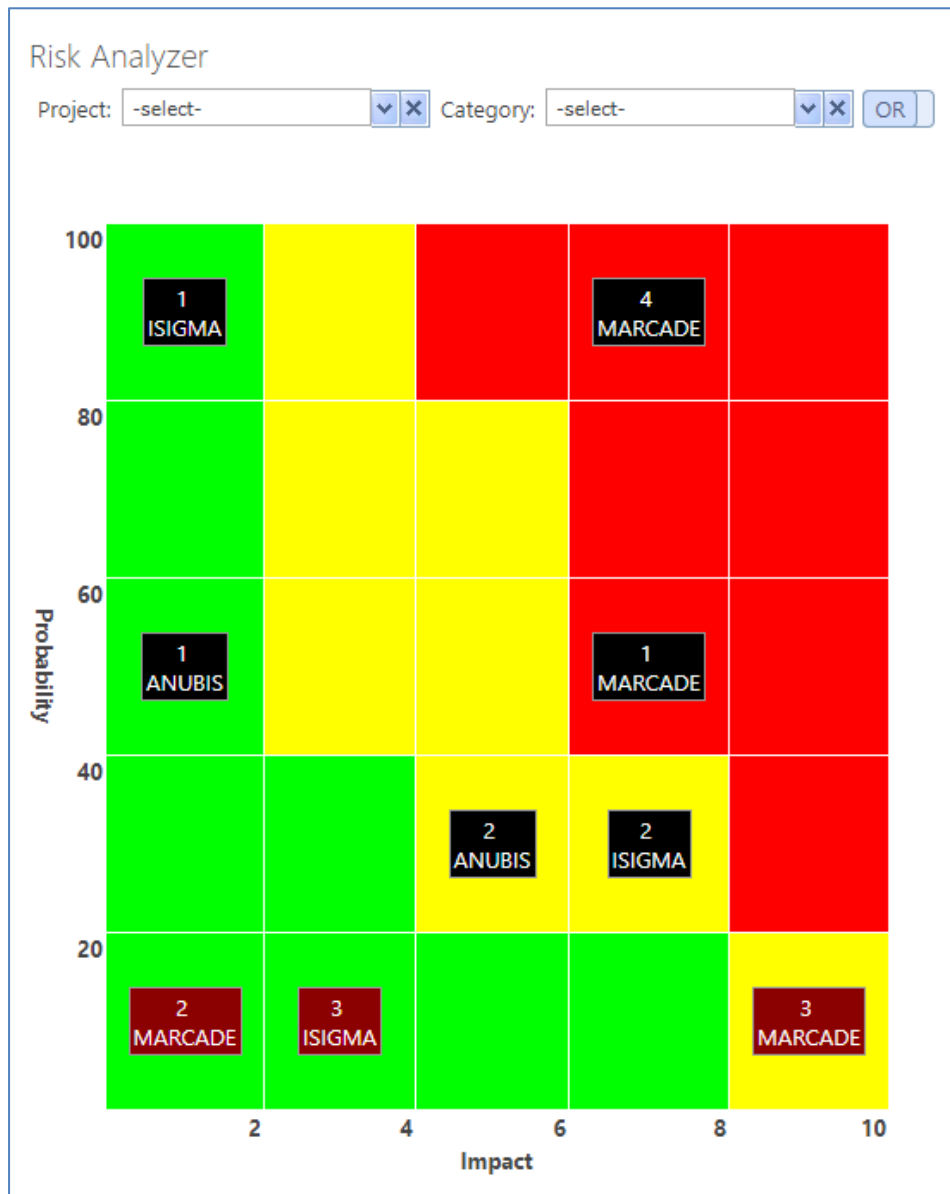


IMPORTANT:

The "Risk Path" chart requires the Risks list to include versions. Each saved version where either impact or probability column was changed, will appear as an instance in the Risk Path chart.

Risk aggregation from multiple sites (Pro. edition)

With the Risk Management Chart Pro. edition you can display risks aggregated from multiple sites. In the following example the Risk Management chart web part displays risks aggregated from 3 project sites:



As you can see, we also have a filtering form above the chart, which enables filtering the displayed risks by project and category. This is also part of the Pro. edition – the ability to configure a filtering form with the exact filtering



fields that you need.

For more details please refer to the Administration guide in the next section.

Administration Guide

General

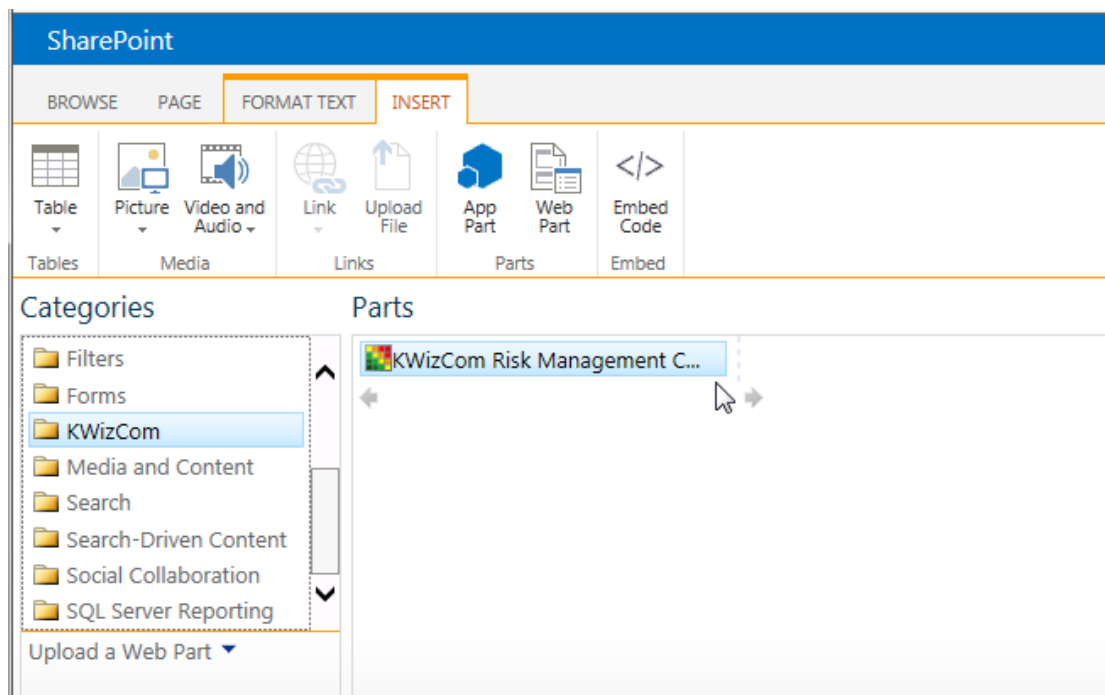
After you have successfully installed the product and activated the site collection feature – see “Post Installation” section), please follow the following steps to start working with the Risk Management Chart:

Step 1: Create a Risks list

You can use the “KWizCom Risk Management” list template (available after you activate the S.C feature), or use any other list to store your risks, you just need to make sure you have the following 4 columns:

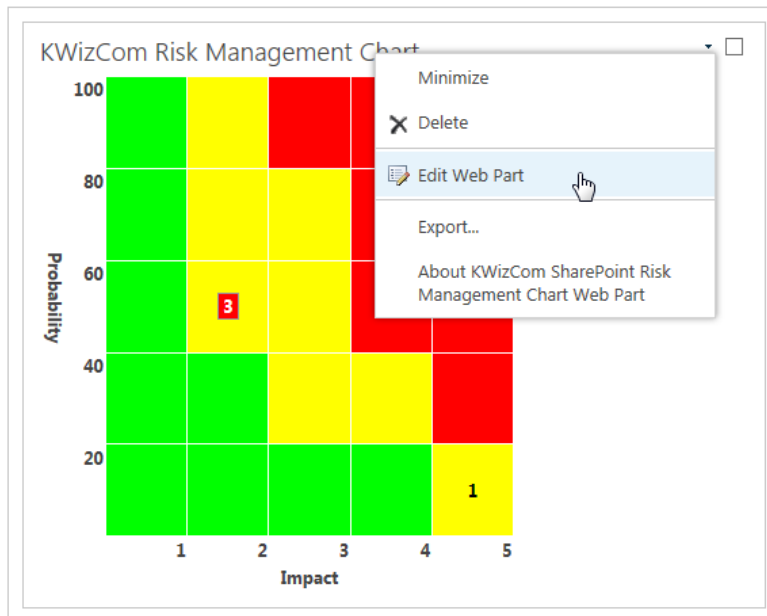
| Column | Type |
|-------------|---------|
| Title | text |
| Impact | Numeric |
| Probability | Numeric |
| DueDate | Date |

Step 2: Add the Risk Management Chart to your site/s

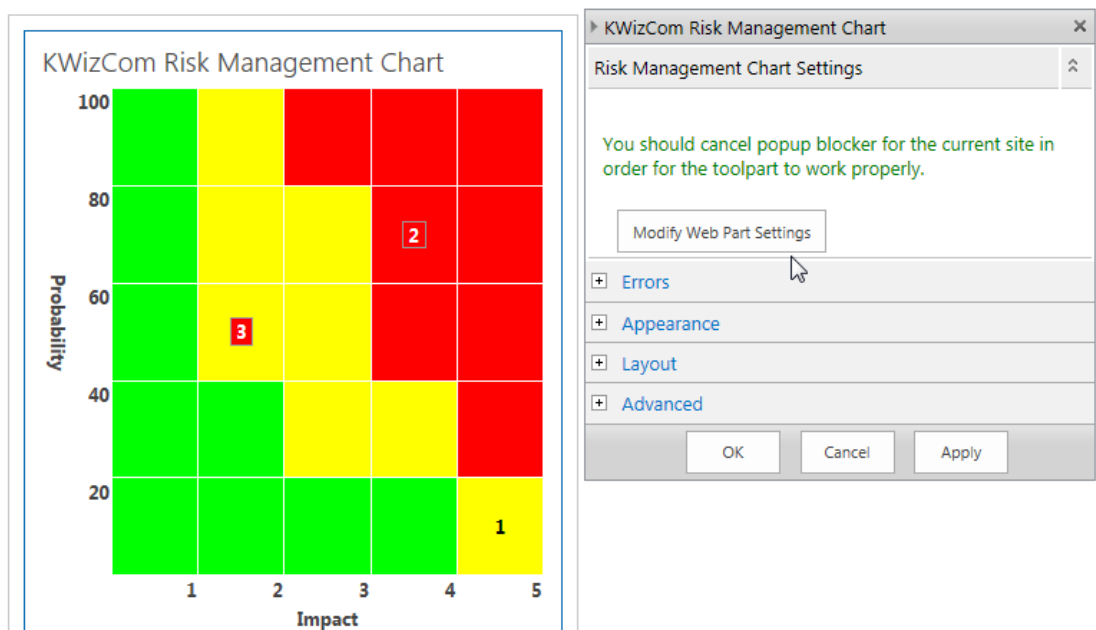


Step 3: Configure the Risk Management Chart

1. Click the web part's "Edit web part" menu:



- And then click the "Modify web part settings" button:



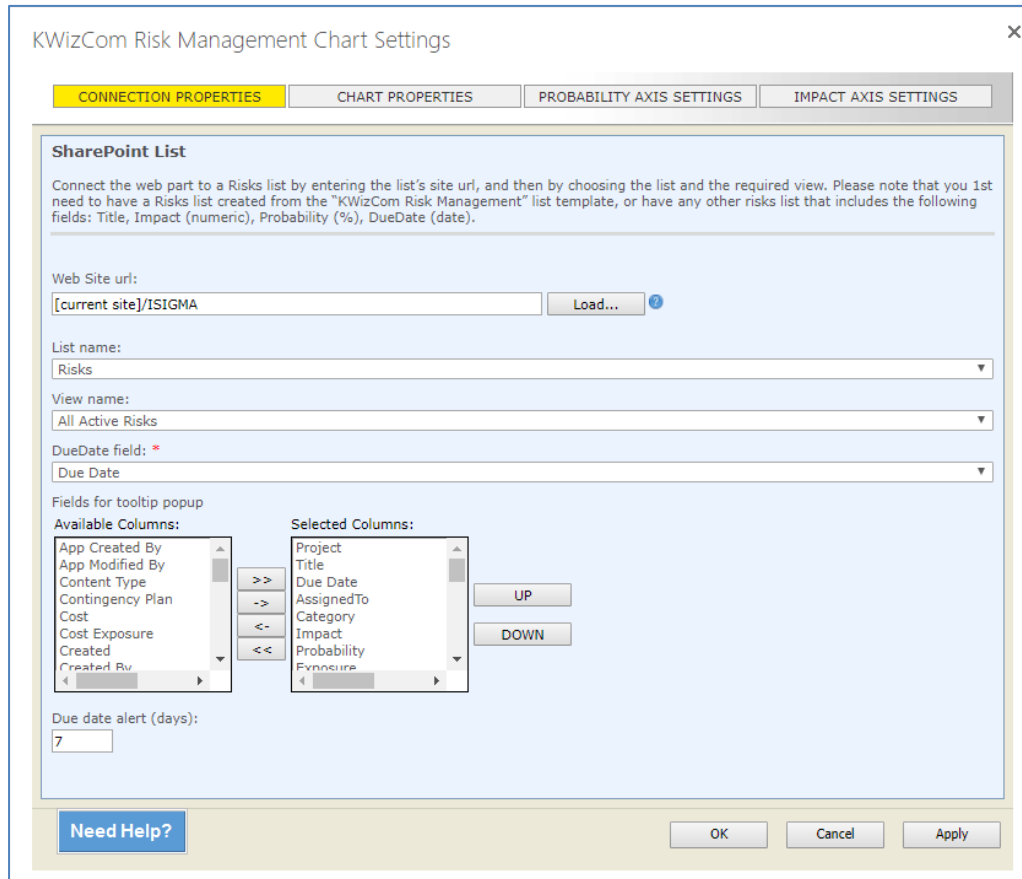
2. A tool part pane will appear on a new window with the following tabs:



- a. Connection properties
 - b. Chart properties
 - c. Probability axis settings
 - d. Impact axis settings
- 3.** Configure Risk Management Chart properties and save the settings (see details about the toopart settings in the next section).

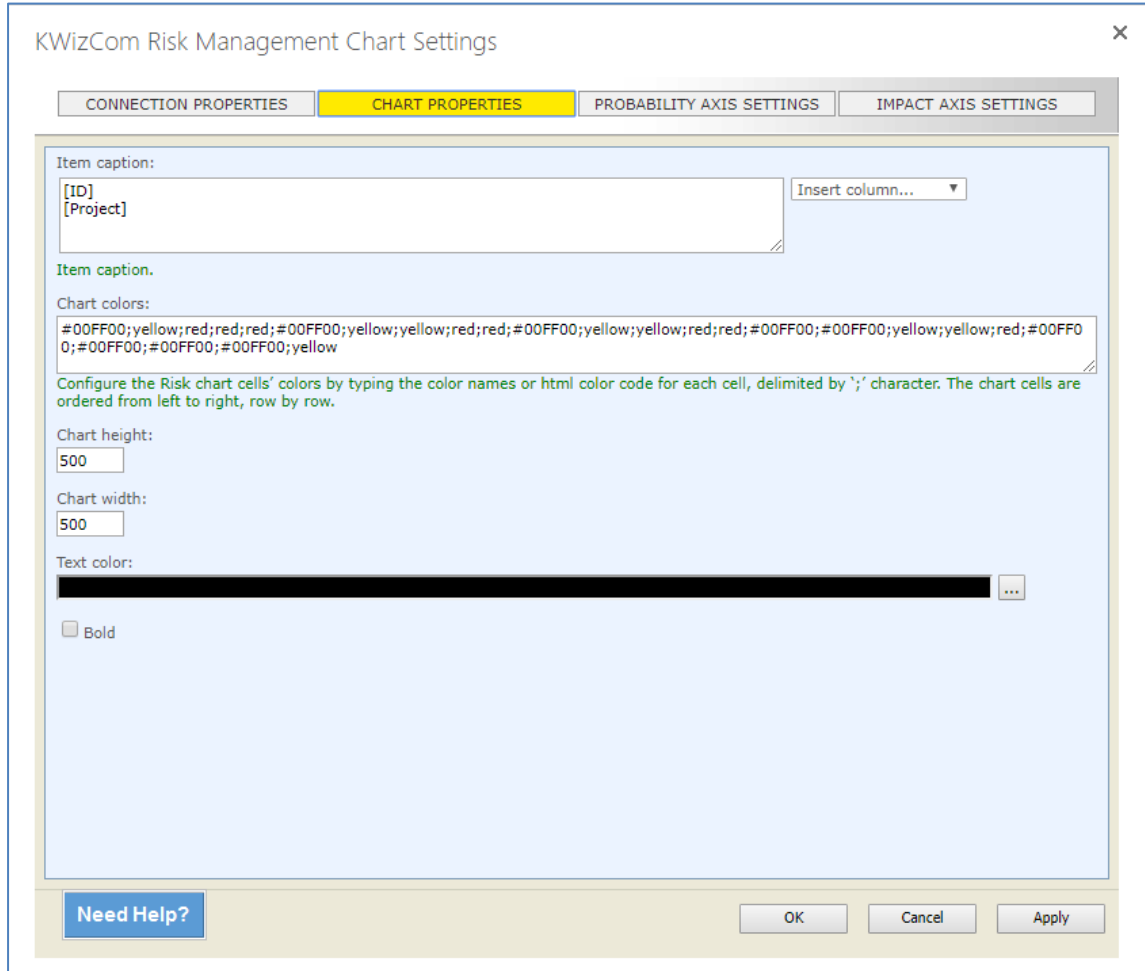
Toolpart properties

Connection Properties tab



| Property | Description |
|--------------------------|--|
| Website url | Site url where your Risks list is located. |
| List name | The risks list name |
| View name | View name, sets which items to show on the matrix. |
| DueDate field | Select the field that contains the risks' due date value. |
| Fields for tooltip popup | Select the column you wish to be displayed in a tooltip when end-user hovers over a risk item in the chart. |
| Due Date alert (days) | Set an alert about risks that are due within the number of days specified (default is 7 days). Risk that is due soon, will be marked with a surrounded red rectangle. |

Chart Properties tab

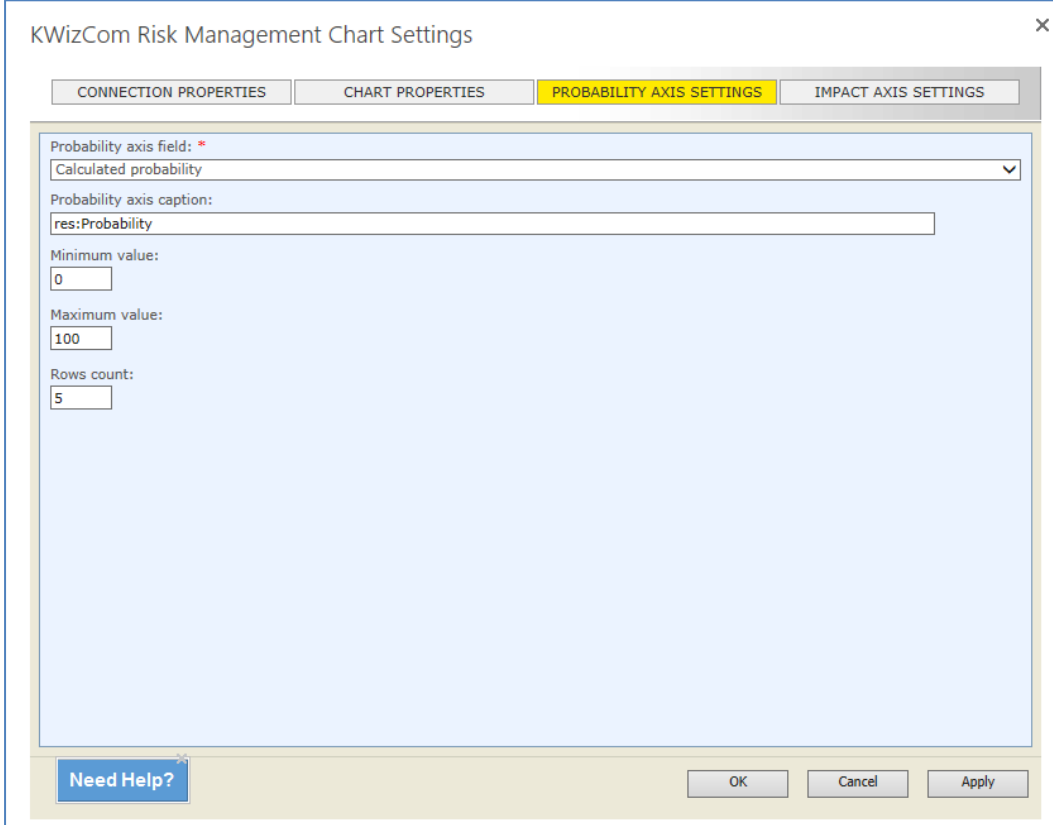


| Property | Description |
|--------------|--|
| Item caption | Configure which columns/text should appear for every displayed risk in the chart. To display a column simply type its name surrounded by brackets, or select it from the "Insert column.." drop-down. |
| Chart colors | Change the color of each square in the Risks chart, by entering the color name or HTML color code, according to their order in the chart. The squares are ordered from left to right, row by row. (The first line is represented by: "Green;Yellow;Red;Red;Red"). Find color codes at http://html-color-codes.info/ |
| Chart height | The graphic chart's height in pixels |
| Chart width | The graphic chart's width in pixels |



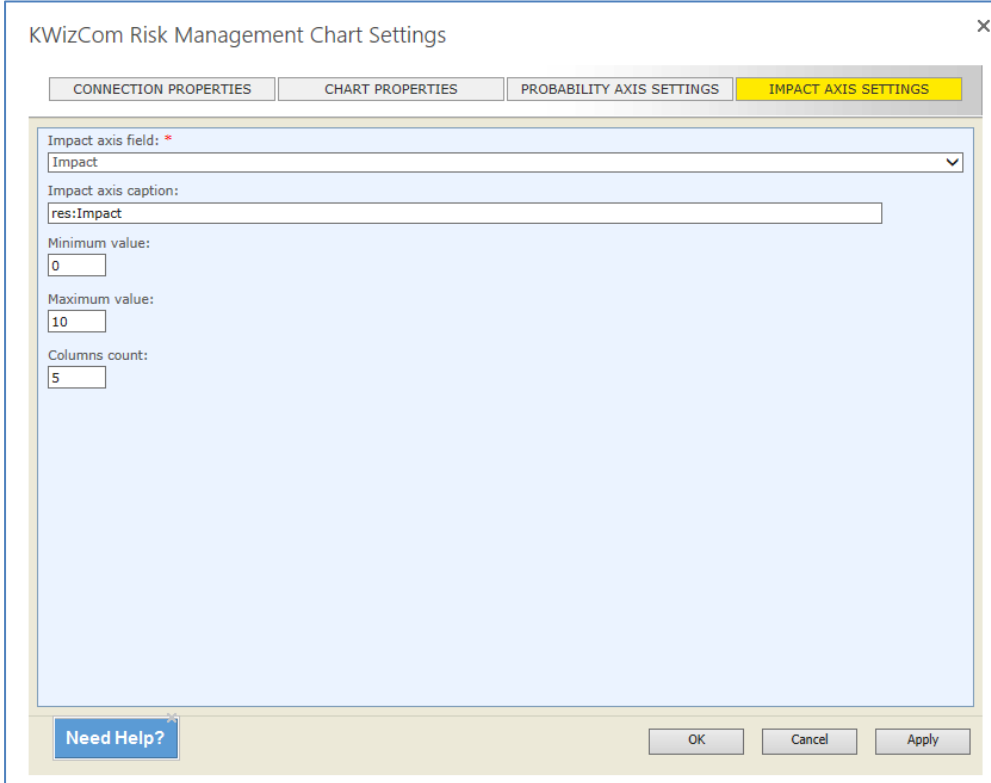
| | |
|------------|--|
| Text color | Select the font color of displayed risks in the chart. |
| Bold | Check to display bold risk ID numbers in the chart |

Probability axis settings tab



| Property | Description | Comment |
|--------------------------|--|--|
| Probability axis field | Select the field that should be displayed in the chart's "Probability" axis. | |
| Probability axis caption | Type the caption to be displayed in the chart's "Probability" axis | |
| Maximum Value | The maximum value to show on the Probability scale | Items with an out-of-range probability won't be shown on the chart. You can adjust the min and max value of the Probability column on the Risks list itself, to prevent the user from entering a not-allowed value. |
| Minimum Value | The minimum value to show on the Probability scale | |
| Rows Count | Number of chart rows. | |

Impact axis settings tab



| Property | Description | Comment |
|---------------------|---|--|
| Impact axis field | Select the field that should be displayed in the chart's "Impact" axis. | |
| Impact axis caption | Type the caption to be displayed in the chart's "Impact" axis | |
| Maximum Value | The maximum value to show on the Impact scale | Items with an out-of-range Impact won't be shown on the chart. You can adjust the min and max value of the Impact column on the Risks list itself, to prevent the user from entering a not-allowed value. |
| Minimum Value | The minimum value to show on the Impact scale | |
| Columns Count | Number of chart columns | |

Configuring Risk aggregation (Pro. edition)

The Pro. edition includes an additional web part called "List Filter Plus" web part.

This web part performs 2 tasks:

1. Aggregate items and provide them to a consumer web part.
2. Display configurable filtering form that filters the connected web part/s.

For more details about the List Filter Plus web part, please refer to the product user guide:

<http://www.kwizcom.com/sharepoint-add-ons/sharepoint-list-filter-plus/download/#documentation>

Configuration steps for risk aggregation & filtering

In case you have multiple project sites, each with its Risks list, and you wish to aggregate risks from all your projects and display them in the Risk Management chart, follow these steps:

1. Add the Risk Management Chart and the List Filter Plus web part to your page.
2. Configure the Risk Management chart and connect it to one of the Risks list. It doesn't matter to which list it is connected, the purpose of this connection is only to configure which columns should be displayed in the chart.
3. Configure The List Filter web part's "Table Viewer Properties" - This will configure the filter web part to aggregate risks from all sites below and provide a data table with the required columns.
4. Connect the List Filter web part to the Risks Management chart web part using the "Send DataTable to" type of web part connection. From this point you should see aggregated risks on the Risk Management chart web part.



5. Configure the List Filter web part to display the required filtering fields.
IMPORTANT: Make sure that the source of the filtering columns have exactly the same name as the target columns that you wish to filter in the Risks list.

For more details about the List Filter Plus web part configuration, please refer to the product's userguide:

<http://www.kwizcom.com/sharepoint-add-ons/sharepoint-list-filter-plus/download/#documentation>