Kenexis Integrated Safety Suite

Project Manager

User Manual

Rev 0

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Introduction

This guide describes how to use the Kenexis Instrumented Safeguard Suite (KISS) Project Manager to create, organize, and control accessibility to facilities and studies within KISS. KISS provides technical safety and security professionals with a cloud-based multi-user platform for the design of engineered safeguards.

The KISS suite of software includes multiple applications focused on various process safety related tasks including PHA/LOPA, SIS Design, Fire & Gas Mapping and more. Regardless of the software applications you use in the KISS suite you will need to navigate the KISS Project Manager to access your Kenexis software.

About Kenexis

Kenexis, an independent consulting engineering firm that provides technical safety services for process industries, and other industries that manage risks related to chemicals or stored energy. Kenexis is helping change the way that safety and security are incorporated into industrial business practices by providing safety engineering services, best-in-class software tools, associated training, and comprehensive technical support.

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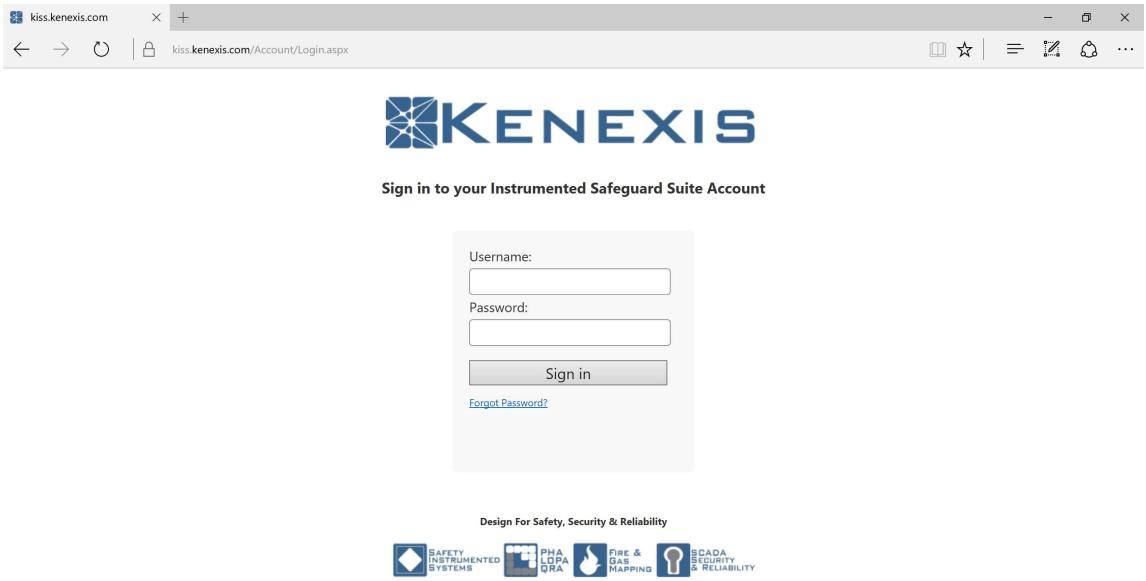
Section 1 – Getting Started

1.1 Instructions for First Time Login

Welcome to Kenexis Instrumented Safeguard Suite (KISS). If you are new to the Kenexis Instrumented Safeguard Suite (KISS) you should have received a welcome package from support@kenexis.com via email with your login credentials. Once you have received this package, it means that your account has been configured and is ready to use. You can access your account by directing your browser to https://kiss.kenexis.com. This will navigate your browser to the KISS login page, shown below.

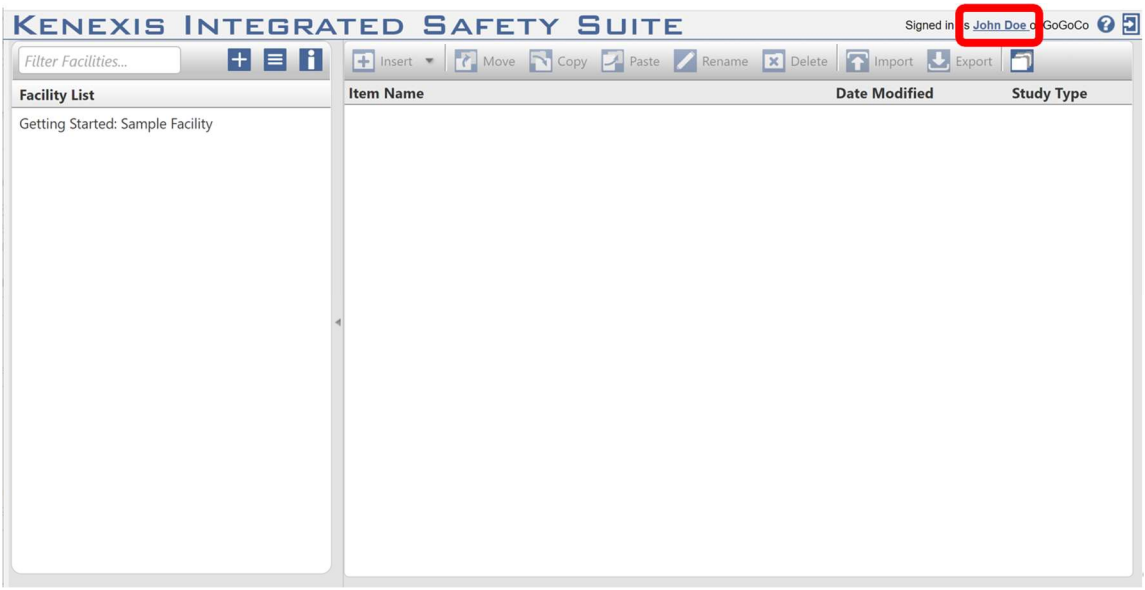


From here you can login using the login credentials provided in your KISS welcome email. If you've lost your temporary password or believe your welcome package may have been blocked by a corporate firewall or spam filter, it can be restoring by using the "Forgot Password?" link. If you've lost your username, please contact support@kenexis.com for assistance.

Section 1 – Getting Started

After Successful login, you should arrive at the Study Manger page.

From here, it is highly recommended that you reset your temporary password. You can reset your password by clicking on your name in the top right corner.



This will open the account settings window where you have the option to change your password and user information. This window also contains License Status information for each app including access type and expiration date.

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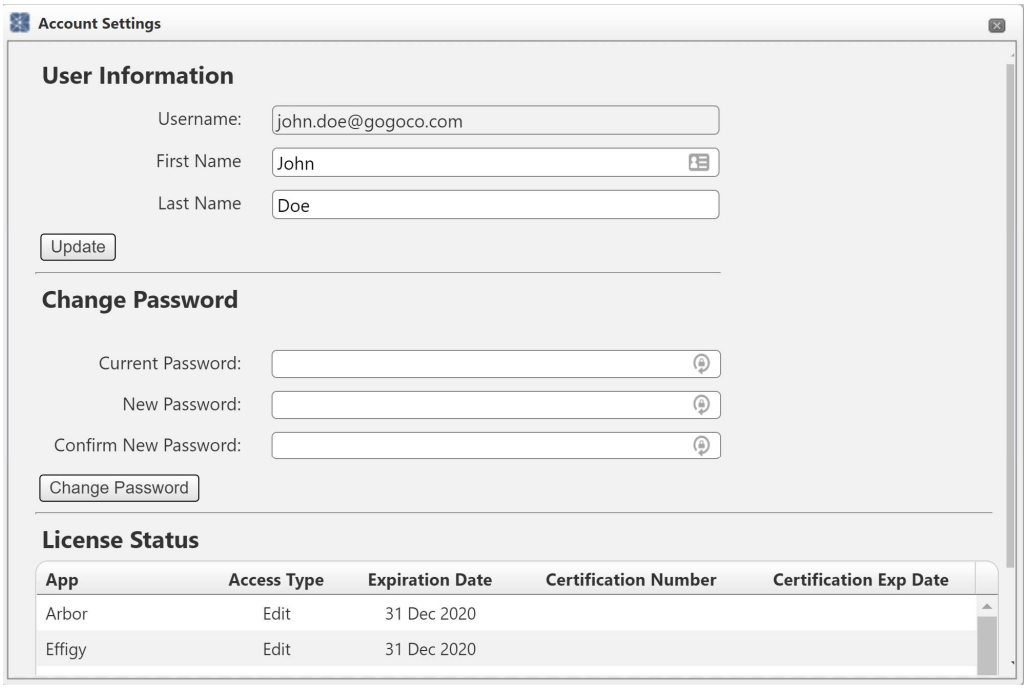
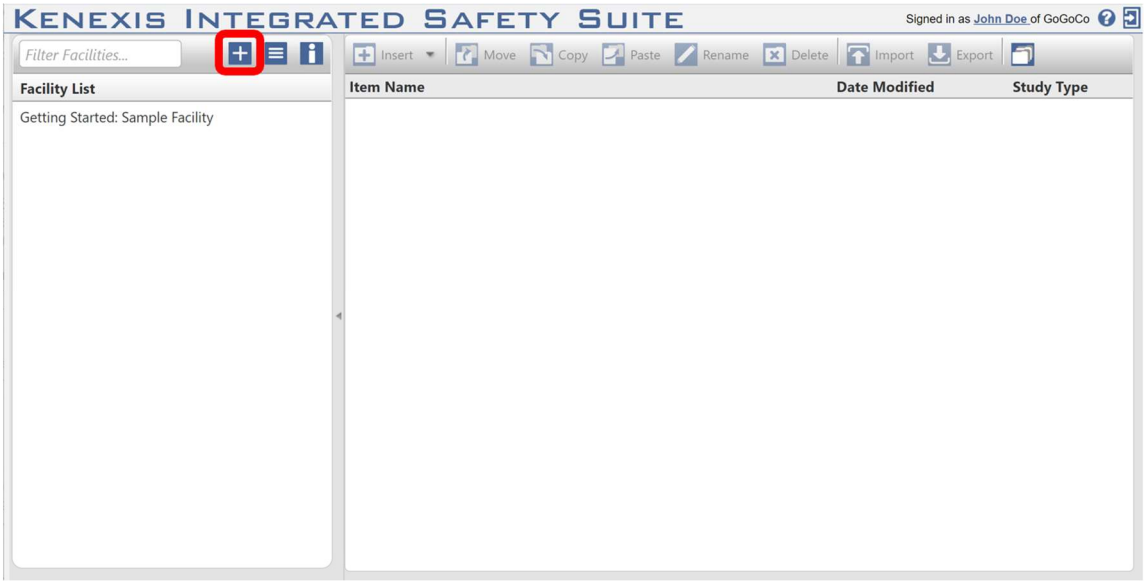


1.2 Login Issues

This section describes some of the common causes and solutions for trouble with logging into the Kenexis Instrumented Safeguard Suite (KISS).

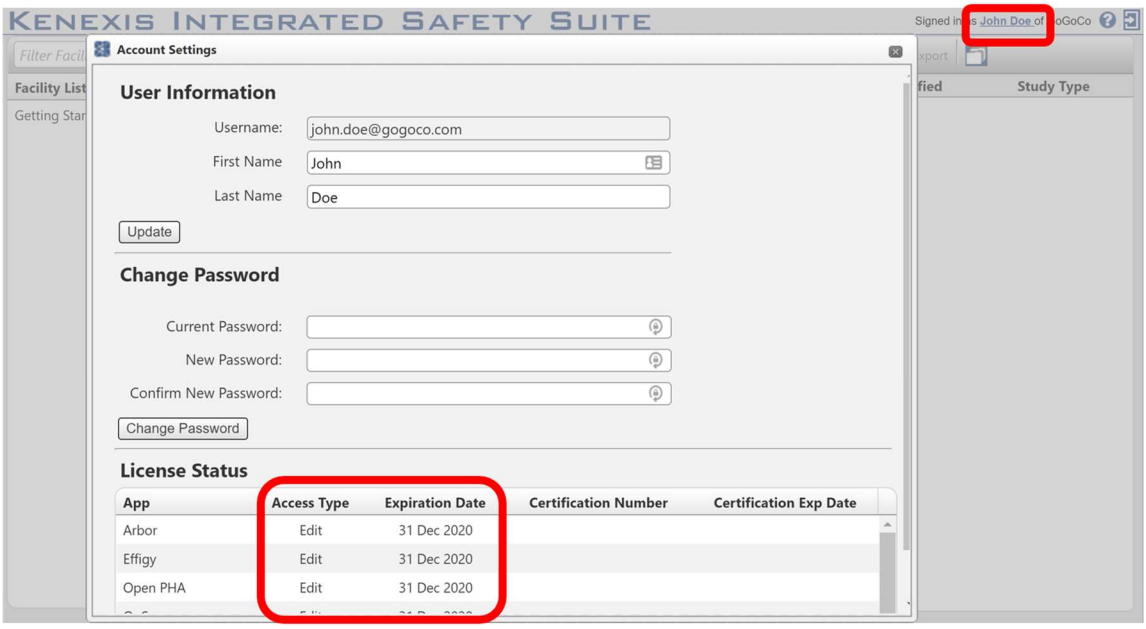
Issue	Trouble-Shooting
I forgot my password	Visit Kiss.Kenexis.com and click on the "Forgot Password?" link.
I forgot my username	Contact Support@Kenexis.com to restore your account
There are no studies on the Study Manager Page	If you are not able to view any facilities or studies on the Study Manager page it is because you do not have access to any study information. Depending on your roles within your company you may have privileges to create a new facility by clicking on the Add Facility button (shown below).

Section 1 – Getting Started



If you are a first time user and unfamiliar with the data structure you may want to consider following the "Creating Your First Study" tutorial.

Alternatively, if your account has been assigned read-only permissions you will need to contact your project manager/company administrator to grant you access to the desired studies. You can view your account permissions on your account settings window, which is accessed by clicking on your name in the top right corner.



Section 1 – Getting Started

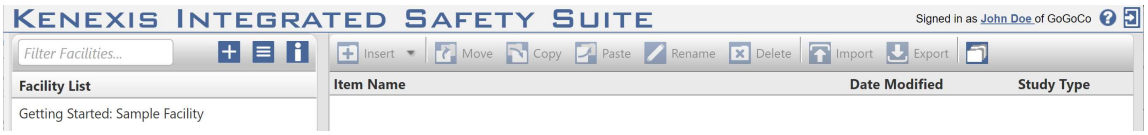
1.3 Other Resources

In addition to the information provided in this user manual, help and support for use of the KISS Manager can also be obtained from the following resources:

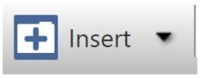
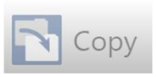
- Live Support from Kenexis Staff. Support requests can be submitted to Kenexis staff via the Kenexis support system, which can be accessed from https://www.kenexis.com/support .

Section 2 – Interface

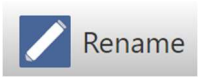
2.1 Navigating KISS



The navigation toolbar serves as the primary means for navigating the KISS interface and appears on all pages KISS. This section details the available buttons on the toolbar:

Button	Description
	Add New Facility This button allows you to create a new facility. The creator of a facility is the default owner of the facility. Once created the owner can assign access to other users as described in Section 3.1.2.
	Facility Properties View the properties of the facility and assign user access as described in Section 3.1.2.
	Facility Dashboard View dashboard information for studies in the facility. Dashboards provide a graphical aggregation of data for certain applications including Open PHA and Vertigo.
	Insert a new folder or study.
	Move a folder or study.
	Copy a study. Is only active for studies.
	Paste a folder or study. Is only active after using “Move” or “Copy”.

Section 2 – Interface

Button	Description
	Rename a folder or study.
	Delete a folder or study.
	Import a study. Study must be a compatible file extension and formatted correctly. Can import a single file or a zip folder, dependent upon application being imported. Additional details on importing and exporting can be found in the user manual for each KISS application.
	The export button can be used to export study data. Formats and file extensions are dependent on the study type being exported. Exported files can later be imported into KISS using the import described above.
	Library Manager Launch the library manager. Libraries are described in Section 3.3.
	Organization Settings Manage settings for your company or organization including, security & privacy settings and user management. Organization management is described in Section 3.4

Section 3 – Using KISS

3.1 Facilities

Upon initial login, any facilities to which you have been granted access will be visible in the "Facility List" area. By default, all new accounts will have access to a facility named "Getting Started: Sample Facilities". This facility contains sample studies for most applications in the KISS suite to help users learn how to work with each software application.

3.1.1 Creating Facilities

Any user can create a facility. In order to do so, click on the "Add New Facility" button above the Facility List area. The creator of a facility is assigned ownership of the facility.

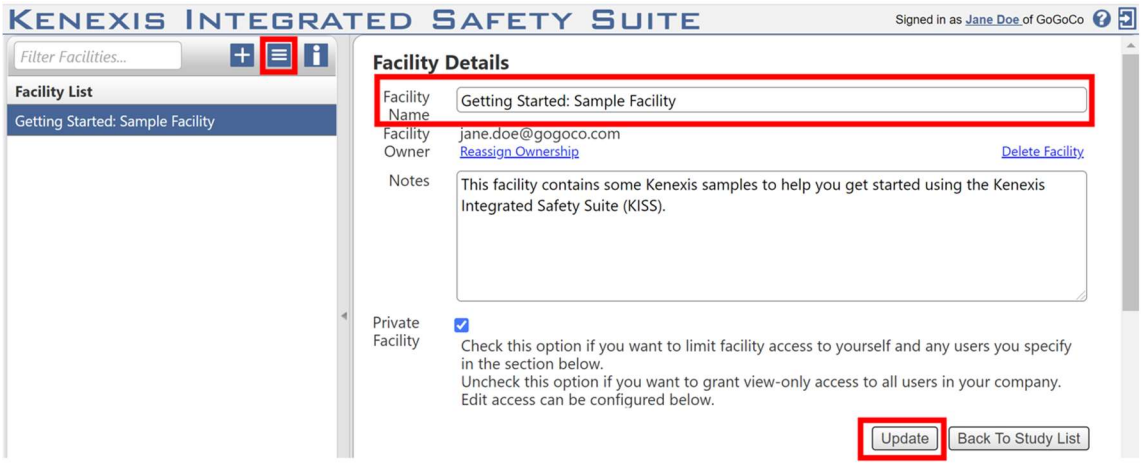
3.1.2 Editing a Facility

To edit or view the properties of a facility, click on the "View Facility Properties" button above the Facility List area. The Facility properties can be viewed by any user who has been granted view/edit access to the facility. However, facility properties can only be edits by the facility owner or a user with administrator access.

Section 3 – Using KISS

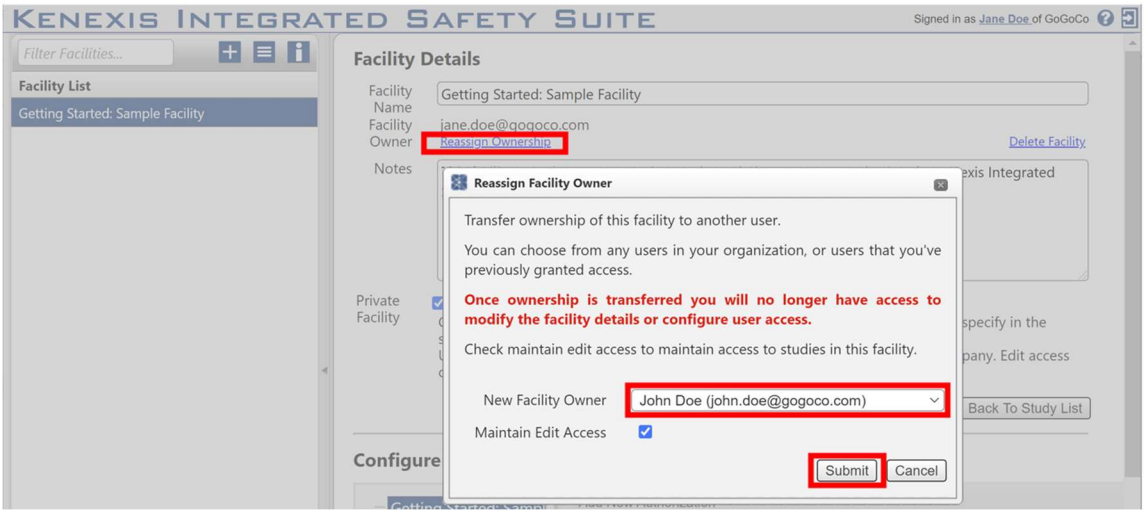
3.1.2.1 Updating the Facility Properties

From the facility details page you can update the Name, Notes and privacy setting for the facility. By default, all facilities are private, which means that only the facility owner and users explicitly granted access can view it. Unchecking the private facility setting will make a facility public within your organization. A public facility can be viewed, but not edited, by any user in your organization. With public facilities higher level access (edit or administrator) will override the view-only access granted by the private facility setting.



3.1.2.2 Changing Facility Ownership

The owner of a facility can be viewed on the Facility Details page. The owner of the facility can reassign ownership to any user within their organization by clicking on "Reassign Ownership". A window will open allowing a new owner to be selected from a dropdown list. Click "Submit" for changes to take effect. If you do not wish to maintain edit access, uncheck the appropriate check box prior to clicking submit.



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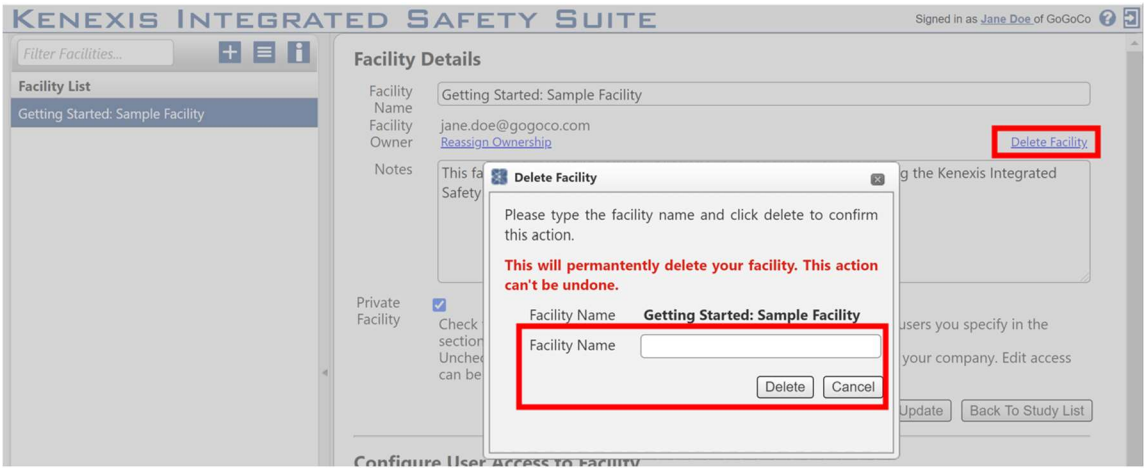
3.1.2.3 Deleting a Facility

The owner of a facility has the option to delete an entire facility. This will delete all data contained within the facility. A facility is deleted from the Facility Details page by clicking on "Delete Facility". A window will open requiring you to retype the facility name that will be deleted prior to clicking the "Delete" button. This is to prevent accidental deletions of facilities. Deleted facilities can't be restored without assistance from Kenexis support.



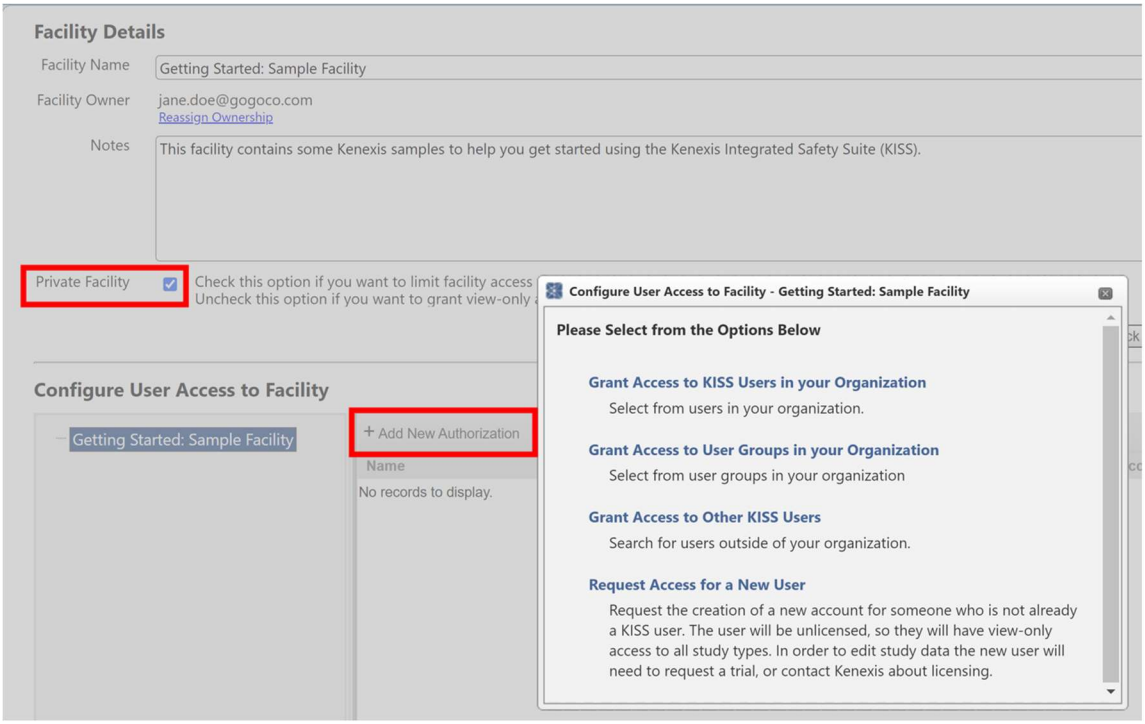
3.1.2.4 Configuring User Access to a Facility

The facility owner or any user assigned administer access to a facility can create facility authorizations for additional users. There are multiple access levels:

Access Level	Access Description
View	Studies and sub-folders are visible but not editable.
Edit	Studies can be edited, provided that the user has the appropriate software licensing to edit a given Study.
Administrator	Edit privileges plus access to assign authorizations to other users

Section 3 – Using KISS

Access levels are edited on the Facility Details page. Scroll to the Configure User Access to Facility section of the page and click on "+Add New Authorization". This is where you can grant View, Edit or Administrator access to users or user groups.



To grant acess to a user outside of your organization you will need to ask that user to provide their KISS username, which must be a valid email address. You will be asked to provide this username to enable access.

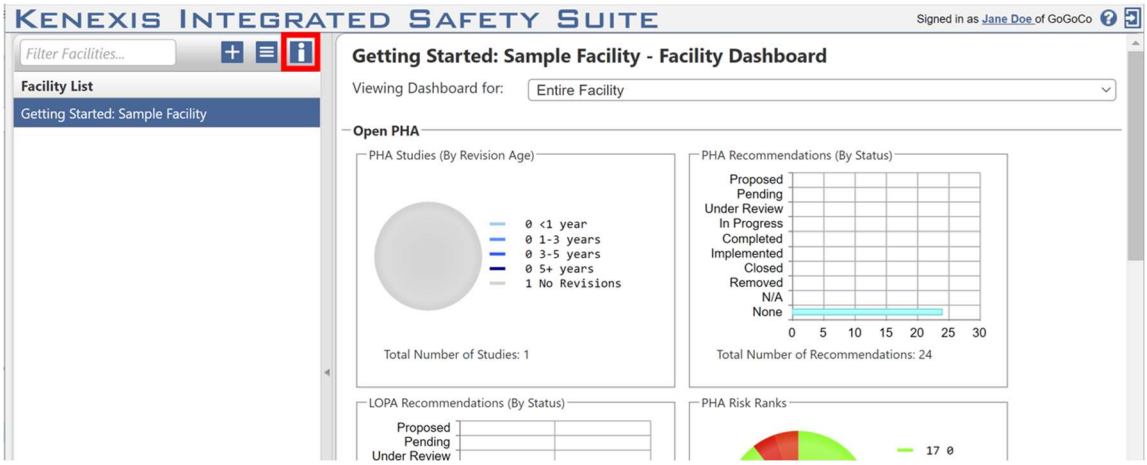
Additionally, you can request access for a new KISS user by providing the users name and email. The new user will be asked to confirm their email before their account is created.

Authorizations can be created at any level in the folder tree within a facility. If an authorization is created on a sub-folder the user will only have that authorization for folders below the folder where the authorization was created. Any studies outside of the folder where the authorization was created will be hidden to that user.

3.1.3 Facility Dashboard

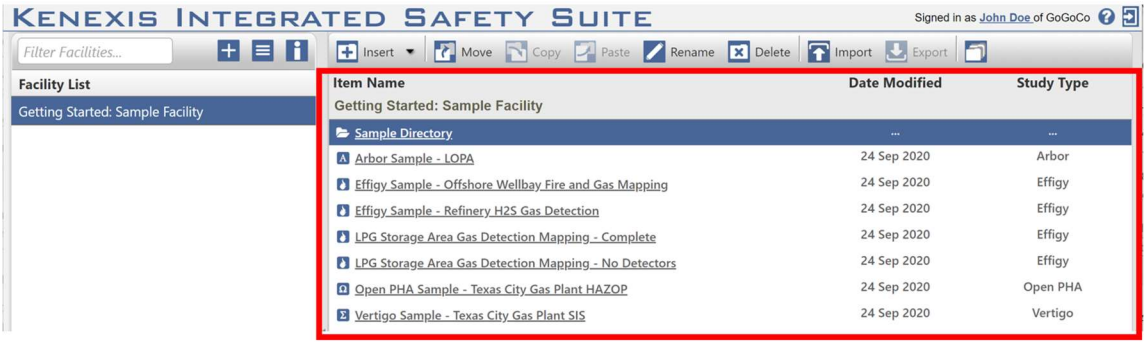
The facility dashboard summarizes some key metrics from studies of certain types including Open PHA Process Hazards Analysis and Layer of Protection Analysis software and Vertigo SIS Lifecycle Management software. The charts on the dashboard can be

aggregated for all studies in a facility or for any level of the folder structure in facility. You can change the aggregation level by selecting from the "Viewing Dashboard For" dropdown.



3.2 Studies and Folders

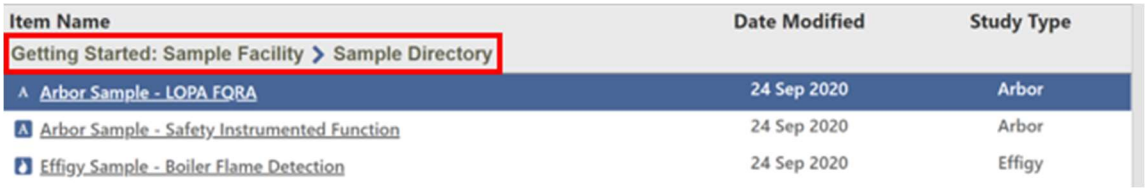
When a facility has been selected, any directories and studies located in that facility will be visible to the right of the facility list. This list may contain directories (folders) or single studies. The type of item can be determined by either the icon to the left of the name or in the "Study Type" column on the far right. If there is no study type listed, it is a directory which may contain additional studies or directories.



A folder or study can be opened by either clicking on the underlined name "link" or by double clicking anywhere else in the row. To select a row without opening, single-click anywhere in the row other than the underlined name. When selected, the row will be highlighted blue. For all the features described here, the file or folder needs to be selected.

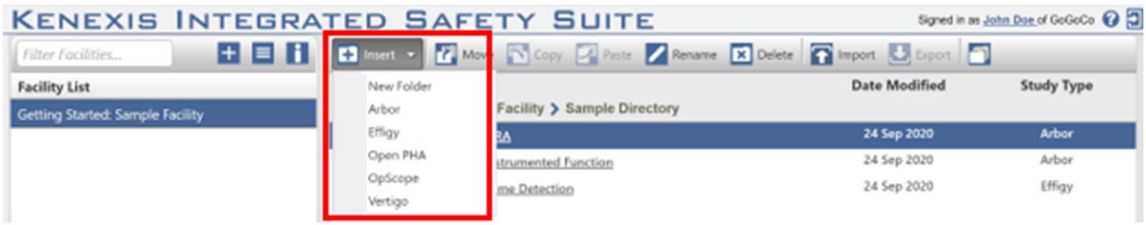
When you are viewing the studies within a folder of a facility, the path is shown above the item list. The current folder is shown on the furthest right. To navigate back to a previous folder, click on the name above the list. The furthest left item is the main

facility list.



3.2.1 Creating Studies and Folders

A folder or study can be located directly in the facility or within a folder in the facility. Navigate to the location where you would like the file to exist and click “Insert”. A drop-down menu will appear where you will be able to choose to insert a folder or a type of new study.



3.2.2 Organizing Studies and Folders

3.2.2.1 Moving a File

After selecting a study or folder, click “Move”. Navigate to the location where you want the file to be moved and click “Paste”. This will remove the file from the original location and put it in the new location. The paste function will not be active unless you have previously clicked Move or Copy.

3.2.2.2 Copying a Study

First select a study and then click “Copy”. Navigate to the location where you want a copy of the study to be located and click “Paste”. KISS will place a copy of the study with the name updated by adding ‘-copy’ to the name string. This function will not

alter the original study. Only studies can be copied; folders cannot be copied.

3.2.2.3 Renaming a File

After selecting a file, click “Rename” and follow the onscreen instructions. This is the only way to rename a folder within a facility. A study can also be renamed this way, or alternatively you may rename a study within the study. When you return to the study list, the updated name will be displayed.

3.2.2.4 Deleting a File

To delete a file, first select and then click “Delete”. You will be required to confirm your request. Folders deleted in this way also delete all files within a study. Deleted studies or folders can’t be recovered without support from Kenexis.

3.2.3 Importing / Exporting a Study

Exporting a study will create a local file complete with all the data needed to open or recreate the study within KISS. Depending on the application, the file may be a type that can be edited offline or it may be a file to store for local back-ups.

Studies can be imported by clicking on the import study icon in the main navigation toolbar, highlighted above. Before importing a study you must select a facility from the facility list on left side of the interface. Once a Facility is selected, the facility will be highlighted blue in the facility list and the import study icon will be enabled, as shown

below. Additionally, studies can be imported to a folder within a facility if one has been selected.

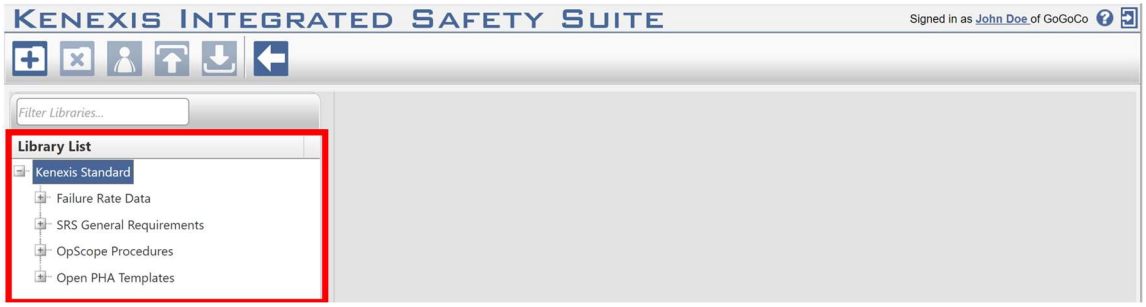
Clicking the import study button will open a file selection dialog which can be used to select the study you would like to import. If the data contained in the file is valid, the import will be performed, and the imported study will be automatically opened in KISS.

For more information related to exporting / importing a specific application, see the user manual for that application.

3.3 Library Manager

The library manager is used to add, edit, or view data used within each of the applications. To view libraries, click on the "Library Manager" button shown after logging into KISS.

Libraries include failure rate data for SIS engineering and application templates for SRS, PHA and Security studies.



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By Default, all KISS Users have read-only access to the Kenexis Standard Library. The Kenexis Standard Library contains the standard libraries available for all KISS users to consume. Most notably the Kenexis Standard Library provides all Vertigo and Arbor users with access to the comprehensive Kenexis Failure Rate Database. Only Users licensed for software applications which utilize libraries will have access to the library manager. Applications which leverage the library manager are listed below.

Application	Library Type(s)
Vertigo	Failure Rate Data SRS General Requirements
Arbor	Failure Rate Data
Open PHA	Open PHA Node Templates
OpScope	OpScope Procedures Templates

In addition to the read-only Kenexis standard libraries. You can also create and manage your own private libraries which can be shared with users inside your organization.

3.3.1 Adding a New Library

To add a new library, click on the "Add New Library" in the control ribbon. This will create a new library and assign you as the owner. When a new library is added, it will be prepopulated with placeholders for the types of libraries to which you have been granted access.

3.3.2 Deleting a Library

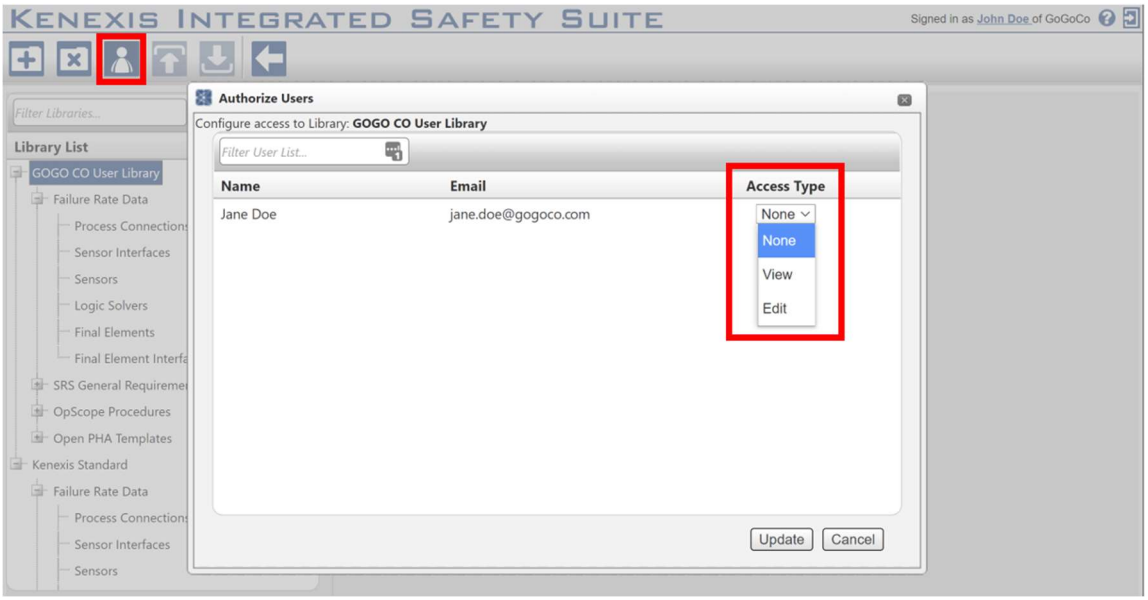
To delete a library and all of its contents, first select the library and then click on "Delete Library" in the control ribbon. This will require you to confirm your deletion request, after which the library will be deleted and all its associated data will be removed. Alternatively, libraries may be deleted by right-clicking on the library and

selecting the “Delete Library” item.

Once a library has been deleted, studies cannot assign associated library data for new use within the study. When a library is deleted, it does not directly impact the results of any studies using data within the library. For the Vertigo application there will be indication that the data being used is no longer “current” with the library, whereas for other applications there will be no impact to references. For more information, see the application user manual for each application.

3.3.3 Authorizing Library Users

Only a library owner my authorize or restrict library access. To edit user access, first select the library and then click on the “Authorize Users” in the control ribbon. This will open a new window that allows you to view users in your organization and remove access to a library entirely or to allow “View” or “Edit” access. Changes will take effect when the “Update” button is clicked. View access does not allow the user to make any changes to the library whereas Edit access will allow them to alter library items as well as adding/deleting library items. Alternatively, the authorized users window may be accessed by right-clicking on the library and selecting the “Authorized Users” item.



3.3.4 Editing a Library

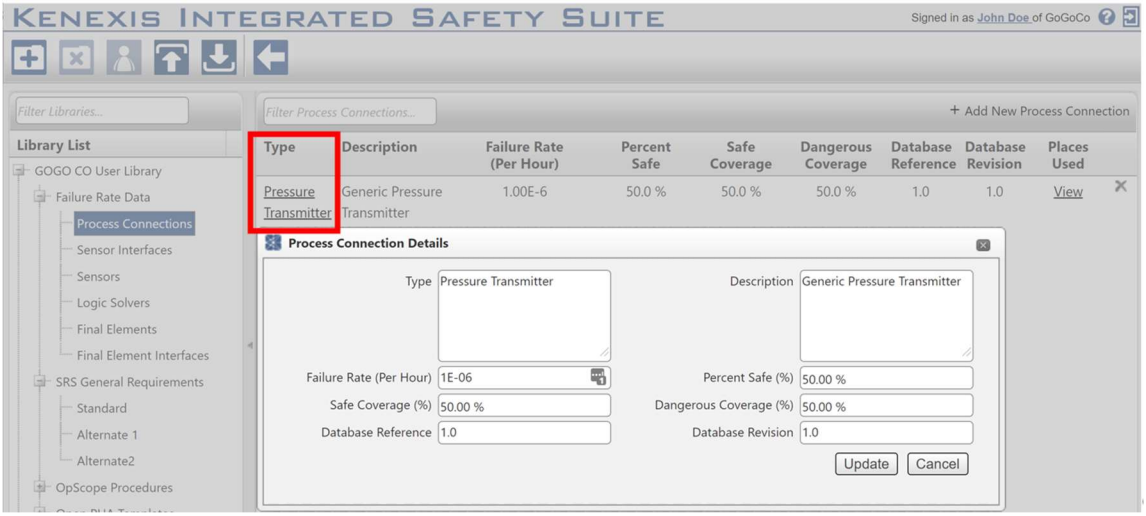
Library editing is reserved for the library owner and only those users granted edit access. Items can be added / deleted or updated by users with edit access.

3.3.4.1 Add New Item to Library

Each library contains sections relevant to the library type. For instance, the failure rate library is divided based on the components that may exist in a safety function. Once a subsection is selected, each subsection can be updated with new items by clicking on the "+ Add New . . ." above the component list. A window will open where the user can input relevant information.

3.3.4.2 Edit Existing Library Item

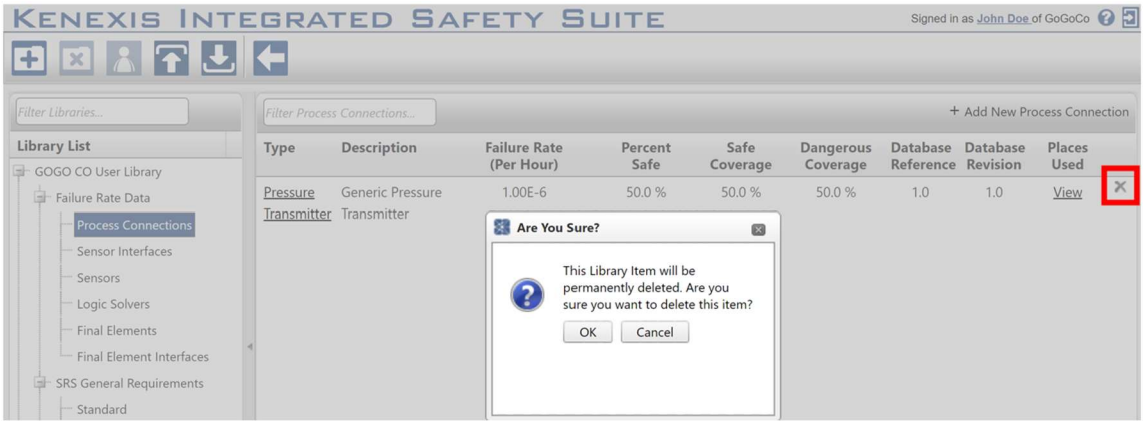
To edit the attributes of an existing library item, the device information must be accessed. This can be done by either clicking on the link in the "Type" column or by double-clicking anywhere in the item row. A window will open where relevant information can be edited. Clicking update will apply the information.



Updating a library item does not update it in any applications previously using the data. In order to update application library items, please refer to the application user manual.

3.3.4.3 Delete Item from Library

To delete an existing library item, the library subsection must be selected. This will provide a list of the items located within that library. To delete an item, click on the 'X' icon on the far right of the item row. A window will open to confirm deletion of the item.



When a library item is deleted, it does not directly impact the results of any studies using data. For the Vertigo application there will be indication that the data being used is no longer "current" with the library, whereas for other applications there will be no impact to references. For more information, see the application user manual for each application.

3.3.5 Appending / Exporting a Library

Library subsections can be appended (importing) or exported. Appending allows, the user to add many items at once. Library subsection Exporting a will create a local file complete with all the data in the library. Depending on the library, the file may be a type that can be edited offline (Excel) or it may be a file to store for local back-ups.

Section 3 – Using KISS

Library items can be imported by clicking on the Append Library Items icon in the control ribbon, highlighted above. Before appending a library, a subsection must be selected from list on left side of the interface. Once a subsection is selected, the append library items icon will be enabled.

Clicking the append button will open a file selection dialog which can be used to select the file you would like to import. If the data contained in the file is valid, the import will be performed, and the imported items will be added to the subsection that was selected.

For first time imports, it can be helpful to first export the library subsection that you wish to update. This will provide the proper format for importing. Information from this export should be removed so that only the new information is included prior to import.

Exported files will be available from your browser download tab or in the downloads folder on your computer.

3.3.6 Returning to the KISS Main Page

The user can navigate back to the main page of KISS using the "Back to Study List" button in the control ribbon.

3.4 Managing Your Organization

When your organization licenses it's first KISS application Kenexis will ask you to designation one or more users as administrators for your organization. Organization administrators will have access to manage your organization settings including security & privacy settings, managing users and managing user groups. Organization settings can be accessed by clicking on the "Manage Your Organization" button in the control ribbon. This button is only visible to organization administrators.

Section 3 – Using KISS

3.4.1 Security and Privacy

From the security & privacy tab of the organization settings you can manage your organization name, privacy settings and login options. By default, when users in your organization create a new facility it will be private which means that only that user and any users who have been granted access can see the new facility. Enabling the "Make Facilities Public By Default" setting will make any new facilities created by users in your organization visible to all users in your organization unless the user chooses to make that facility private through the facility properties (see Section 3.1.2).

By default, sharing is allowed outside your organization. This means that users in your organization will have the option to grant access to your organizations data to other KISS users outside the organization. You can disable this feature by disabling "Allow Sharing Outside of your Organization".

By default, all KISS users sign into KISS with local logins. The login credentials are maintained on Kenexis servers and in order to block access to KISS data for a user either leaves the organization or is suspected or having compromised credentials you will need to disable login from KISS.

To provide easier to manage security, many organizations opt to leverage single sign-on through an LDAP provider such as Microsoft. KISS supports single sign-on through Microsoft Azure Active Directory and it can be configured from the security & privacy tab. For detailed instructions on configuration of single-sign on, click on the "get help with single sign-on configuration" link.

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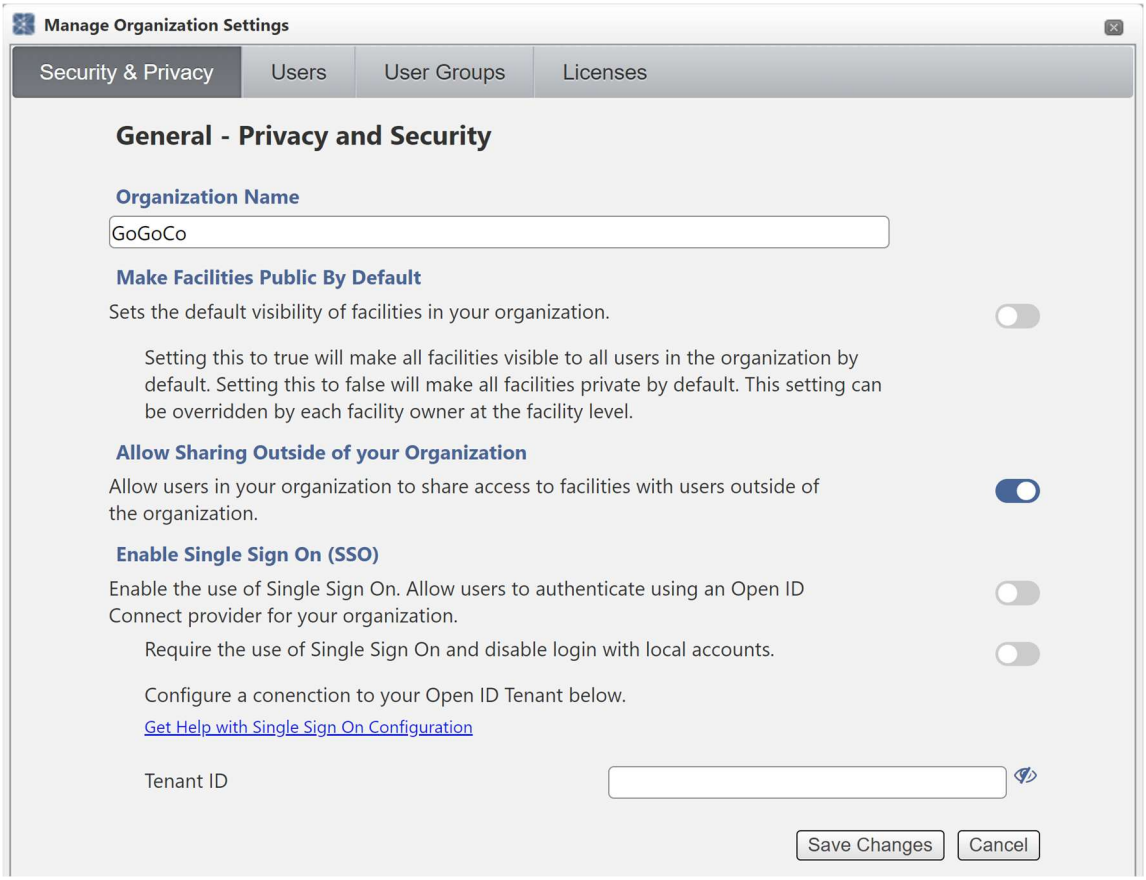


3.4.2 Assigning User Roles for your Organization

User roles are used to allow and restrict actions that can be performed by users in your organization. There are two roles which can be assigned to user's those roles are administrator and editor.

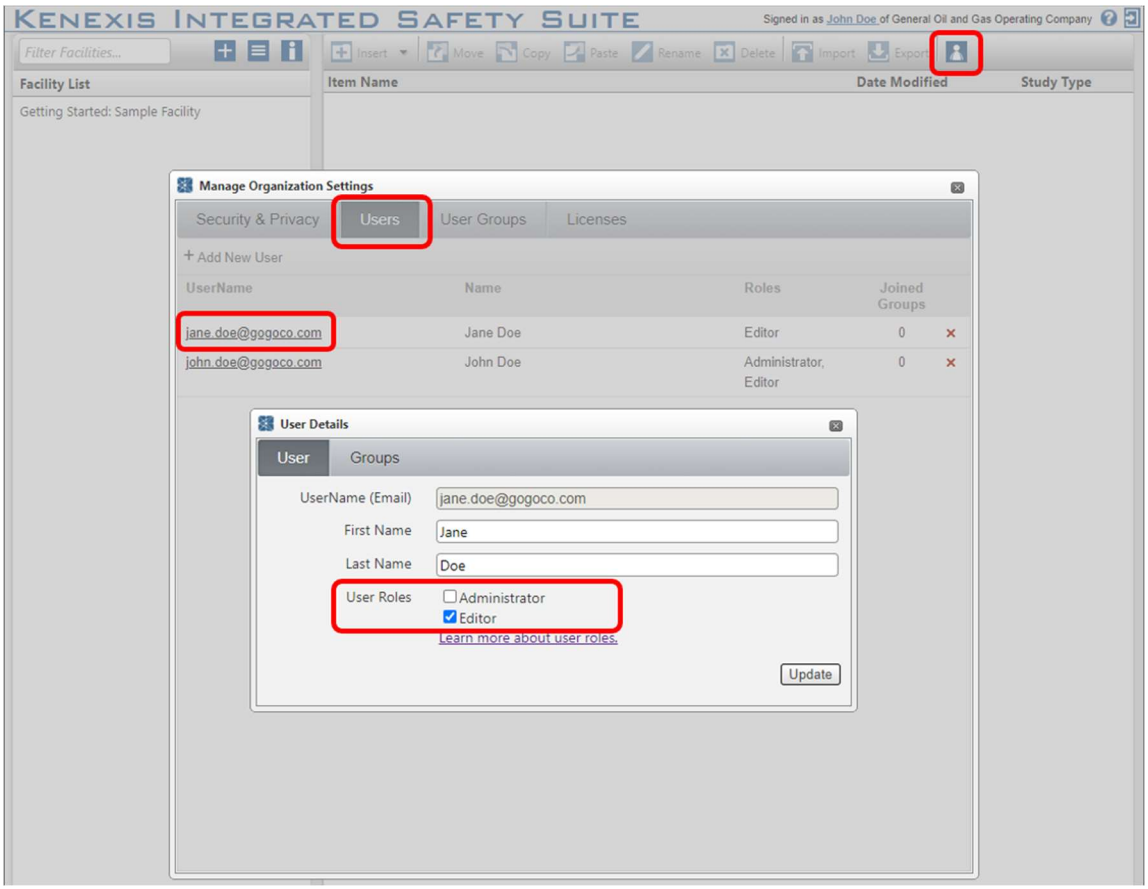
- Administrator: The administrator roles gives the user access manage security and privacy settings for your organization and manage users / user groups. The administrator role should not be assigned to normal users. Administrators have elevated privileges to manage organization settings including deleting user accounts.

- Editor: The editor role gives a user access to edit studies. If a user is not in the editor role, they will have view-only access to all study data regardless of the level of access that is given by an authorization at the facility or folder levels. The editor role is the most common role and should be assigned to any users who are planning to perform work on the Kenexis Integrated Safety Suite.

- No Roles Assigned: If a user is not placed into the administrator or editor roles, they will have the lowest level of access. They will be able to log into the Kenexis Integrated Safety Suite, view any data that they have been authorized to view but have no access to create, modify, or delete any data.

User roles are assigned from the "Users" tab of the Manage Organization Settings window.

From the user list you can view a user's details by clicking on the username. Under the user details you can assign roles by checking the administrator or editor check boxes as well as assigning users to groups.



3.4.3 User Groups

The purpose of user groups is to assign users to a group which can then be used to grant access to facilities or studies as a single entity instead of on a user-by-user basis.

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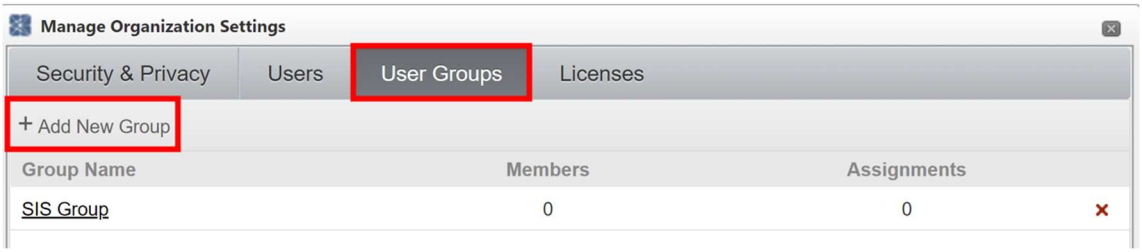
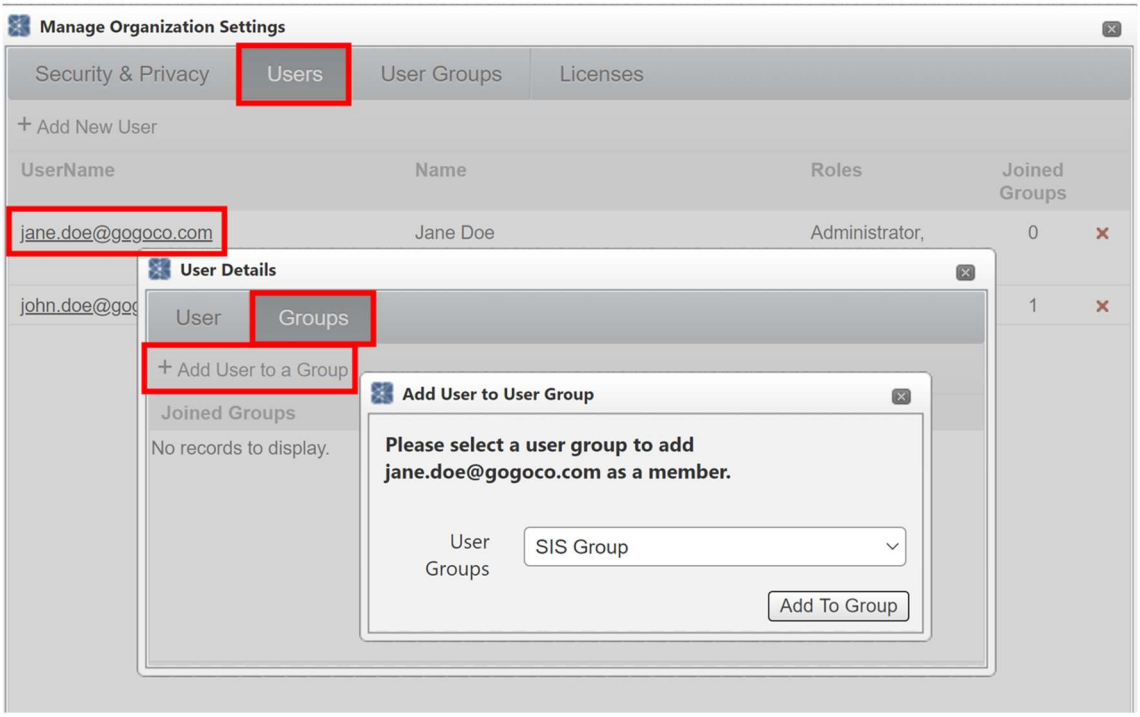
3.4.3.1 Adding a User Group

From the Manage Organization Settings window, click on the "User Groups" tab. To add a group, click on the "+ Add New Group" button. A window will open that will allow a new group to be created. Once a group is made, the Organization Administrator can see how many members are in the group and the number of assignments. To view which users are in a group, click on the group link from the User Group tab.



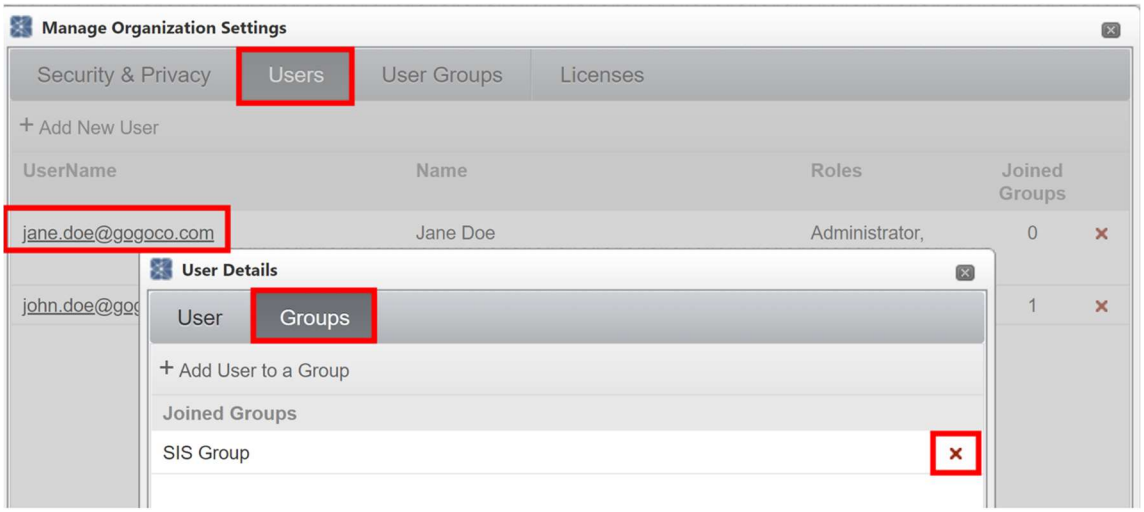
3.4.3.2 Adding a User to a User Group

Adding users to a group is performed for each unique user under the User tab. By clicking on a username, and the Groups tab, the "+ Add User to a Group" button is available. A group must be created prior to adding a user.



3.4.3.3 Removing a User from a User Group

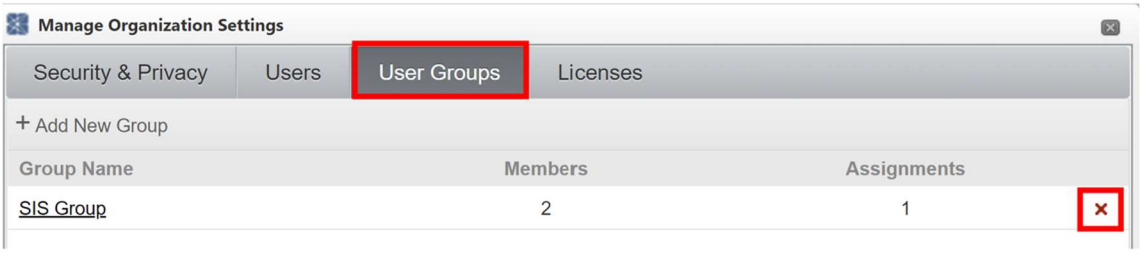
Removing users from a group is also done from for each unique user under the Users tab. By clicking on a username, and the Groups tab, the groups to which they belong will be listed. To remove the user from a group, click the 'X' on the far right side of the row.



Anyone who was granted access to a facility or study through a user group will no longer have access to those files when they are removed from the group.

3.4.3.4 Removing a User Group

From the Manage Organization Settings tab, click on "User Groups". The existing groups for your organization will be visible. To remove the user group, click the 'X' on the far right side of the row.



Anyone who was granted access to a facility or study through a user group will no longer have access to those files when a group is removed.

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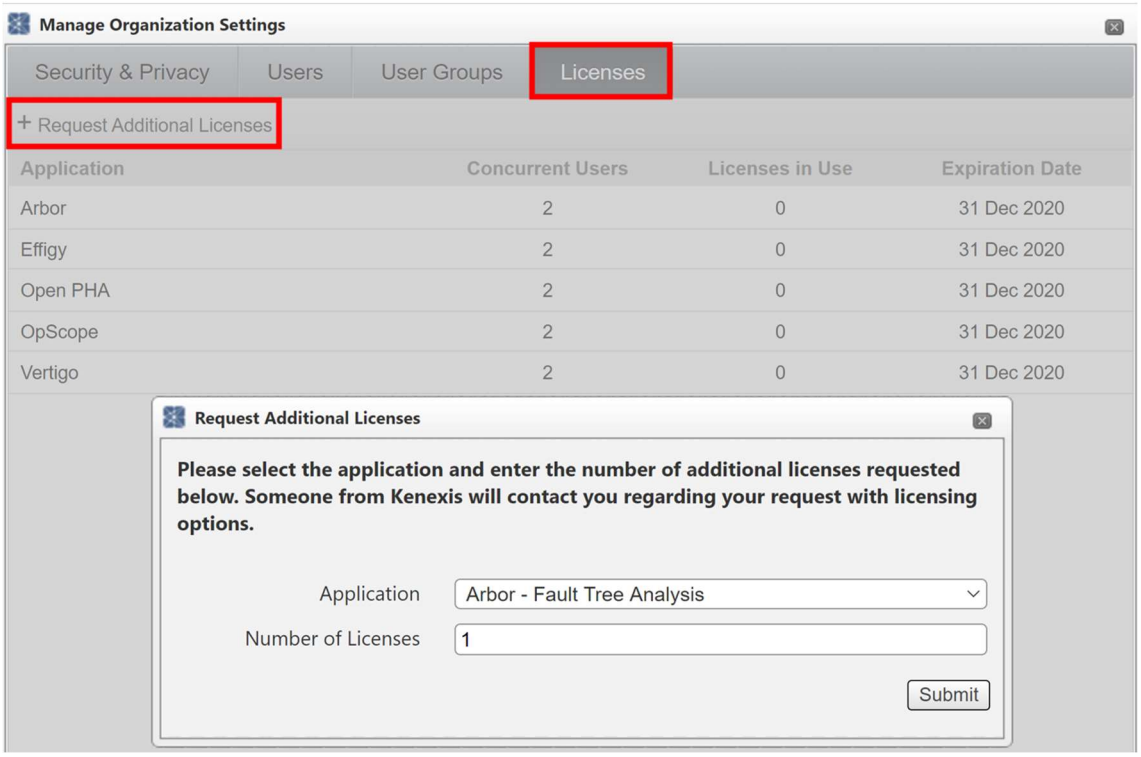
3.4.4 Licenses

From the Manage Organization Settings tab, click on “Licenses”. This page will allow you to view which applications for which your organization currently has licenses as well as how many are currently in use and when they expire.

From this page, you can also request additional license for applications by clicking on the “+ Request Additional Licenses” button. This will open a window where the application and number of licenses that are requested can be chosen. Kenexis will follow-up after the license request has been made.