# Kenexis® Project Manager

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SERVICES
ENGINEERING CONSULTING SERVICES
SOFTWARE
ENGINEERING SOFTWARE TOOLS
TRAINING
ONLINE & CLASSROOM

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# 1 Introduction

## 1.1 About This Manual

The Kenexis Integrated Safety Suite (KISS) is a cloud-based platform for the engineering of process safety systems. It brings a set of technical applications together behind one sign-in, one organizational structure, and one set of access controls. This manual describes that common ground: the workspace every user passes through on the way to an application, and the administrative surfaces that control who may see and change what.

Specifically, this manual covers signing in and managing your account; the Study List and how facilities, folders, and studies are organized within it; the Library Manager, which holds the reference data that applications draw on; the administrative settings that govern an organization, its users, and its licenses; and the Training module.

It does not describe the engineering applications themselves. Each of those has its own manual, and the analysis they perform — hazard identification, fault tree analysis, safety integrity verification, consequence modeling, and the rest — is documented there. Appendix B lists every study type alongside the manual that covers it.

## 1.2 About Kenexis

Kenexis is an independent consulting engineering firm providing technical safety services to the process industries and to other industries that manage risks arising from chemicals or stored energy. Kenexis combines safety engineering services, software tools, training, and technical support to change the way safety and security are built into industrial practice.

## 1.3 The Kenexis Integrated Safety Suite

The applications in the suite address distinct stages of the process safety lifecycle. A reader working in any one of them will still use the surfaces this manual describes, because studies of every type live in the same facility structure and are governed by the same permissions.

*Table 1-1. Applications in the Kenexis Integrated Safety Suite.*

| Application | Purpose |
|---|---|
| Kenexis Open-PHA | Process hazard analysis and layer of protection analysis. |
| Kenexis SIS | Safety instrumented system design and integrity verification. |
| Kenexis Fault Tree | Fault tree construction, cut sets, and quantification. |
| Kenexis Bowtie | Barrier-based risk analysis and bowtie diagrams. |
| Kenexis Fire & Gas Mapping | Fire and gas detector coverage mapping. |
| Kenexis Consequence Modeling | Release, dispersion, fire, and explosion modeling. |
| Kenexis Open-Audit | Compliance auditing and scoring. |
| Kenexis MOC | Management of change workflow and records. |

## 1.4 Support and Resources

Support requests reach Kenexis staff through the support system at www.kenexis.com/support. The Support button in the top navigation bar opens the same channel from inside the platform, so a question can be raised without leaving the page it concerns.

New accounts are provisioned by Kenexis. If you have not received your sign-in details, or your organization needs an additional user added, contact support@kenexis.com.

# 2 Getting Started

## 2.1 Signing In for the First Time

Access to the platform begins with a welcome message from Kenexis containing your user name and a temporary password. Once that message arrives, your account is configured and ready. Direct a browser to the address in the message to reach the sign-in page.

Sign-in takes two steps. Enter your user name — always an email address — and select Continue. The page then asks for your password. This two-step form is what allows the platform to recognize your organization from the address and offer the sign-in methods available to you, which is covered in the next section.

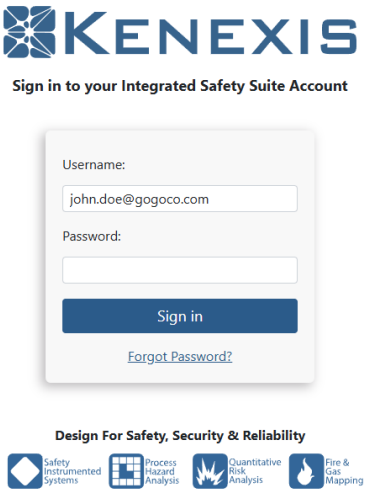



*Figure 2-1. The sign-in page after the user name has been entered.*

Change the temporary password once you are signed in. Open the account panel from the button bearing your initials at the top right of any page, then choose Account Settings.

## 2.2 Signing In with Single Sign-On

Organizations that manage identities centrally can have users sign in with their existing corporate credentials rather than a password held by Kenexis. Entering your user name and selecting Continue tells the platform which organization you belong to, and the page then offers the sign-in methods open to you.

Where your organization requires single sign-on, Continue hands you straight to your identity provider, and you return to the platform already authenticated. Where single sign-on is offered alongside a Kenexis password — the usual arrangement while an organization is still rolling it out — the page presents your provider as a button with the password field kept below it, and either route signs you in. An organization with more than one provider registered sees a button for each.

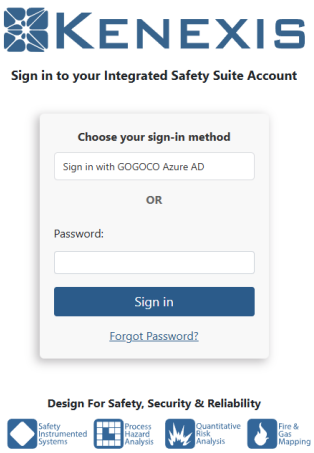



*Figure 2-2. The sign-in page when single sign-on is offered alongside a password.*

An organization administrator sets this up on the Identity Providers tab, described in Section 8.6.

## 2.3 Recovering a Password

The Forgot Password link on the sign-in page sends a reset message to the address you enter, which restores access if a temporary password has been mislaid or the original welcome message was held by a mail filter. Recovering a forgotten user name needs help from support@kenexis.com, since the user name is itself the address the reset message would be sent to.

## 2.4 Your Account

The button showing your initials at the top right opens the account panel. It names the signed-in user, shows the address the account uses, and names the organization the account belongs to.

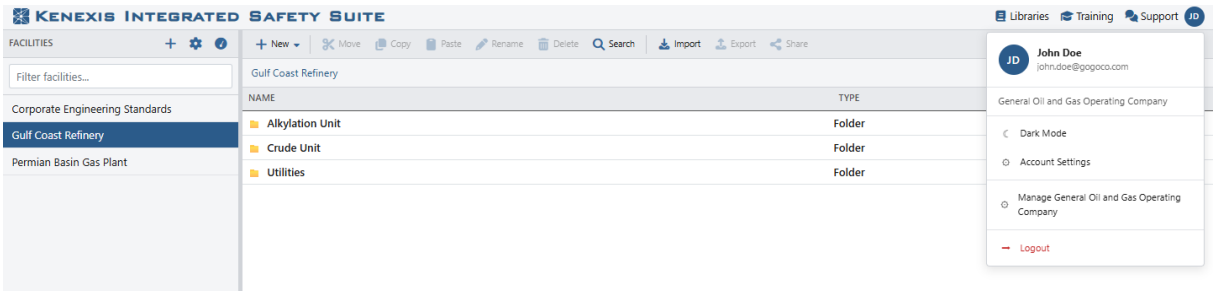



*Figure 2-3. The account panel, opened from the initials button in the navigation bar.*

Account Settings opens a window for changing your password and personal details. The panel also carries the link out of the workspace and into administration for those who hold an administrative role, and the command to sign out. Which entries appear depends on the roles the account holds; Section 3.4 sets out that relationship in full.

## 2.5 Display Preferences

The account panel carries a display-mode control that switches the interface between a light and a dark presentation. The choice is remembered in the browser, so it persists between visits on the same machine and applies from the moment a page begins to load.

The interface language follows the language preference already set in your browser. English, Portuguese, and Simplified Chinese are supported; a browser requesting any of them is served that language automatically.

# 3 Navigating KISS

## 3.1 The Study List

Signing in lands you on the Study List, the workspace from which all study data is reached. It divides into two panes. The left lists the facilities available to you; the right lists the contents of whichever facility is selected.

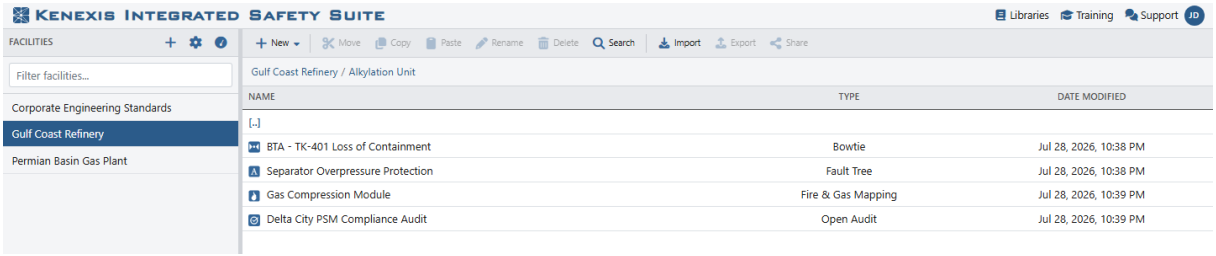



*Figure 3-1. The Study List, showing the facility pane, a folder's contents, and the toolbar.*

Selecting a facility on the left loads its contents on the right. Items are listed with a name, a type, and the date the item was last modified. A folder carries a folder icon and the type Folder; a study carries the icon of its application and the name of its study type.

A single click on a row selects it, which is what enables the toolbar commands that act on a selection. Opening an item is a separate action: either double-click anywhere in its row, or click the underlined name directly. The distinction matters because most of the operations in Chapter 6 require an item to be selected but not opened.

The path above the list records where you are. Its leftmost entry is the facility itself and each subsequent entry is a folder you have opened. Selecting any entry returns you to that level. Inside a folder, a row marked with two dots moves up to the parent.

Facilities can be reordered for convenience. The pin beside a facility name lifts it to a pinned group at the top of the list, which is worth doing for the one or two facilities you work in daily. The filter box above the list narrows it by name.

## 3.2 The Toolbar

The toolbar above the item list carries every command that acts on the current folder or the current selection. Commands that cannot apply are shown but disabled, so the toolbar also indicates why an action is unavailable: a command greyed out with nothing selected simply needs a selection first.

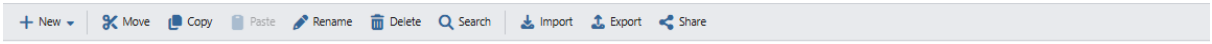



*Figure 3-2. The Study List toolbar with a study selected.*

*Table 3-1. Study List toolbar commands.*

| Command | Acts on | Becomes available when |
|---|---|---|
| New | The current folder | A facility is selected. Offers a new folder or a new study of any |

| Command | Acts on | Becomes available when |
|---|---|---|
| | | licensed type. |
| Move | The selection | A study or folder is selected and the facility permits moving it. |
| Copy | The selection | A study is selected and the facility permits copying it. Folders are not copied. |
| Paste | The current folder | Move or Copy has staged an item and the destination permits creating one. |
| Rename | The selection | A study or folder is selected and the facility permits renaming it. |
| Delete | The selection | A study or folder is selected and the facility permits deleting it. |
| Search | The current facility | A facility is selected. |
| Import | The current folder | The folder permits creating studies. |
| Export | The selection | A study of an exportable type is selected, and the organization permits export. |
| Share | The selection | Any item is selected. |

Two of these conditions reach beyond the toolbar itself. The permissions a facility grants to its editors are set on the facility and are described in Section 5.6; the organization-wide export setting is described in Section 8.2.

## 3.3 Searching a Facility

Search examines the selected facility and returns matching studies and folders wherever they sit in its structure, which is the quickest route to a study whose location you no longer remember. Results identify the folder each item was found in, so a search doubles as a way of confirming where something lives.

## 3.4 Roles and What They Unlock

Every surface described in this manual is governed by the roles held by the signed-in account. Roles are granted by an organization administrator on the Users tab, described in Section 8.3. A reader who cannot see a button described here should look first at this table.

*Table 3-2. Roles and the surfaces they unlock.*

| Role | What it grants |
|---|---|
| Editor | The ability to change study data. An account without this role can open and read everything it has been granted access to, and creates nothing. Most working users hold it. |
| Organization Administrator | The Security & Privacy, Users, User Groups, Licenses, Identity Providers, and Recycle Bin administrative surfaces, and the ability to grant roles to other users. Reserved for the few people who manage the organization. |
| User Administrator | The Users, User Groups, and Licenses surfaces, for delegating day-to-day user management without also delegating the organization's security settings. |
| API Administrator | The API Integrations surface, where tokens scoped to a single study are issued. Appears only where the organization holds an API license. |

| Role | What it grants |
|---|---|
| Training Administrator | Course management, the Course Builder, and the Training Matrix, for the person responsible for the organization's training program. |

Roles combine. The account used for the illustrations in this manual holds Organization Administrator, Training Administrator, and Editor together, which is a typical arrangement for the person who both administers an organization and works in its studies.

Access to an individual facility is granted separately from these roles, through the authorizations described in Section 5.5. The two work together: a role determines what kind of action an account may take, and an authorization determines which facilities and folders it may take that action in. An account without the Editor role holds read-only access to study data however generously its authorizations are written.

# 4 Training for Learners

## 4.1 The Training Hub

Training reaches the platform as courses of recorded modules and quizzes. The Training link in the navigation bar opens the hub, which presents the courses available to you. A badge on that link counts the courses assigned to you that remain incomplete, so outstanding training is visible from wherever you are working.

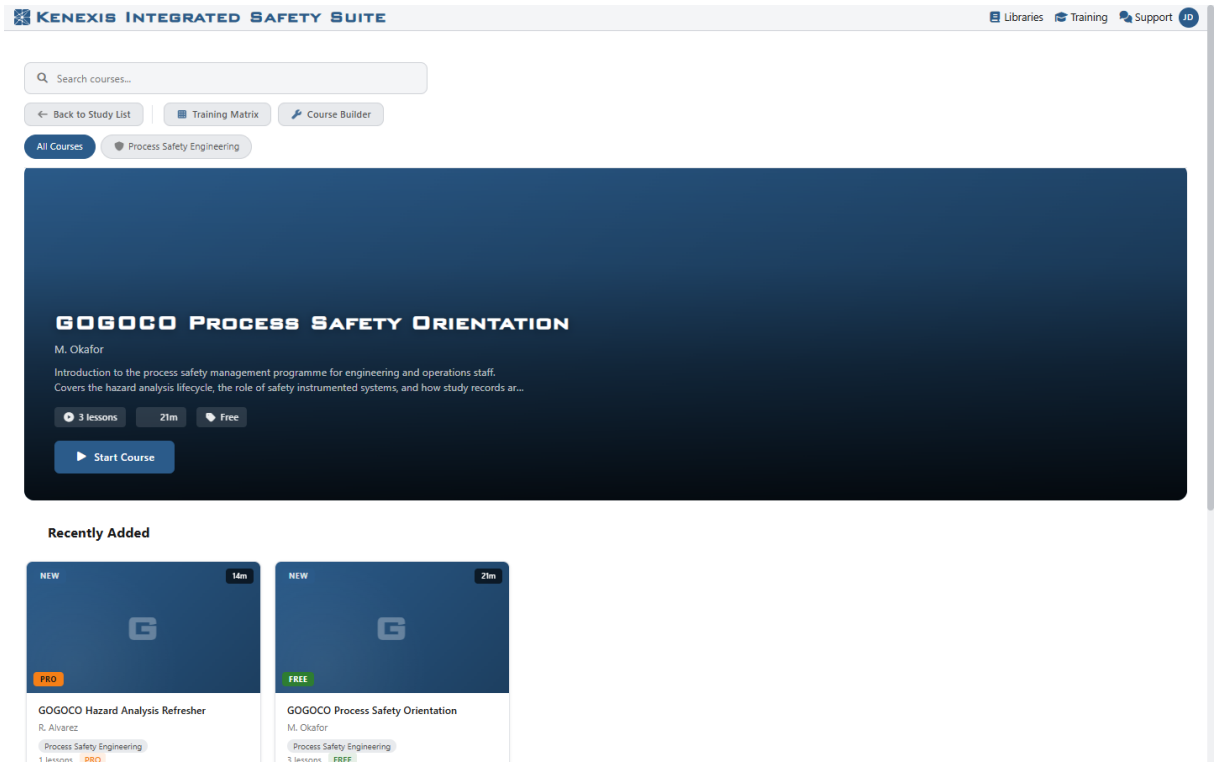



*Figure 4-1. The Training hub, with a featured course above the course rows.*

A featured course occupies the banner at the top, and its button reflects your own position in it: it invites you to start a course you have not begun, and to resume one already under way. Below the banner, courses are grouped into rows. Assigned to You holds courses an administrator has registered you for; Continue Watching holds those you have started; Recently Added holds the newest. Further rows group courses by subject.

Each course appears as a card carrying its title, its presenter, its length, and its subject tags. A card also carries its status: whether the course has been assigned to you, whether it is newly added, and how far through it you are. Courses that need no license are marked Free.

The search box above the rows matches on course title, and the subject chips beside it narrow the hub to a single subject. Selecting either replaces the rows with a single grid of matches.

## 4.2 Course Details

Selecting a course opens its detail page: who developed it, who presents it, the professional development hours it carries, a description, and the full list of its sections and modules with the length of each.

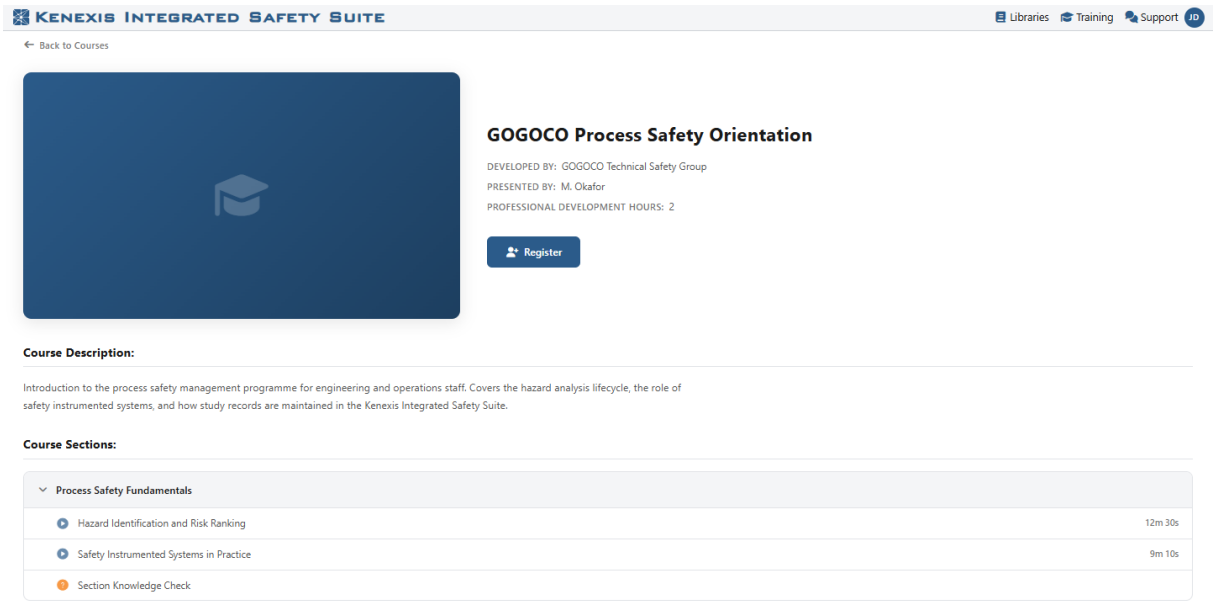



*Figure 4-2. A course detail page listing its sections and modules.*

The action button reflects your position in the course. Register enrols you and is offered where the course is free, where it belongs to your own organization, or where your organization holds a training license. Once registered, the button becomes Start, and then Resume once you are under way. Completing a course turns it into Print Certificate, which produces a certificate recording the professional development hours earned.

Courses that require a license your organization does not yet hold offer to put you in touch with Kenexis about training subscriptions instead.

## 4.3 Playing a Course

Starting or resuming a course opens the player. A contents pane on the left lists every module in the course with its length, marks those already finished, and highlights the one now playing, so the pane doubles as a progress record and a way of moving directly to any module.

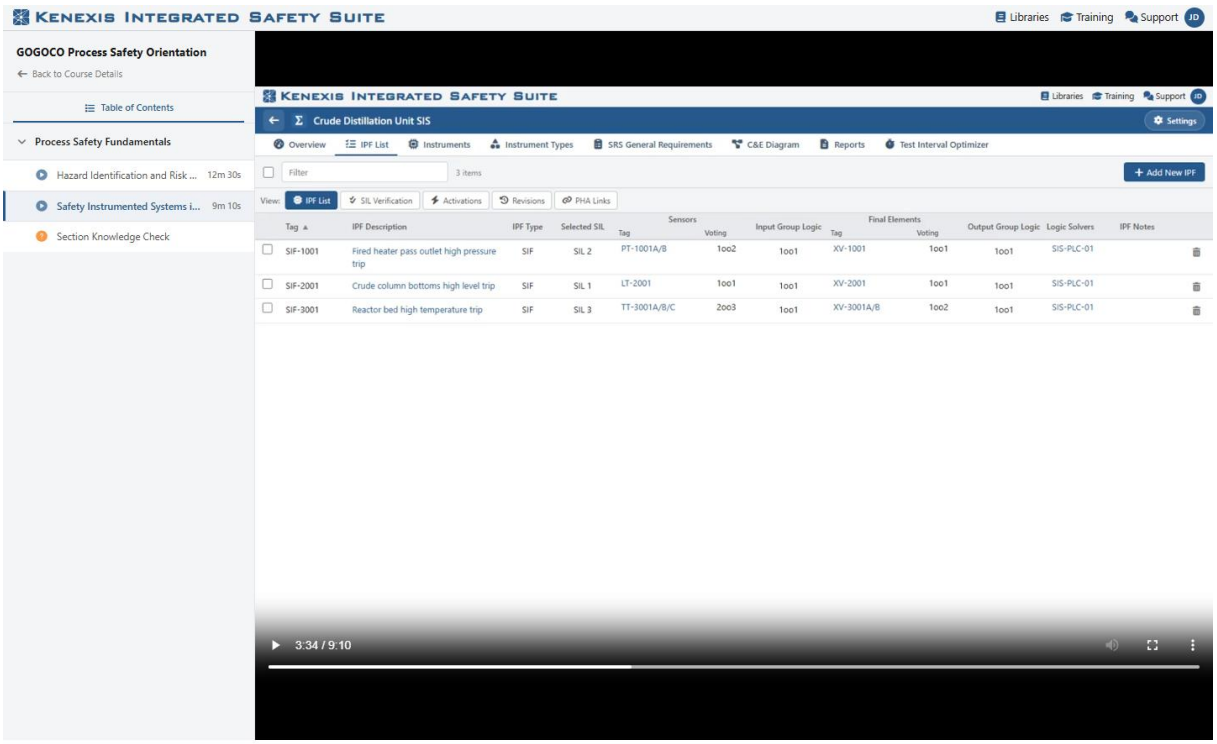



*Figure 4-3. The course player, with the contents pane listing the course's modules.*

A video module plays in the main area. Reaching the end of the video marks the module complete and moves on to the next one, so a course played straight through advances by itself. Where a course carries supporting documents, a second tab beside the contents makes them available to download.

## 4.4 Quizzes and Completion

A quiz module presents its questions together, each with four answers, and submits them as a set.

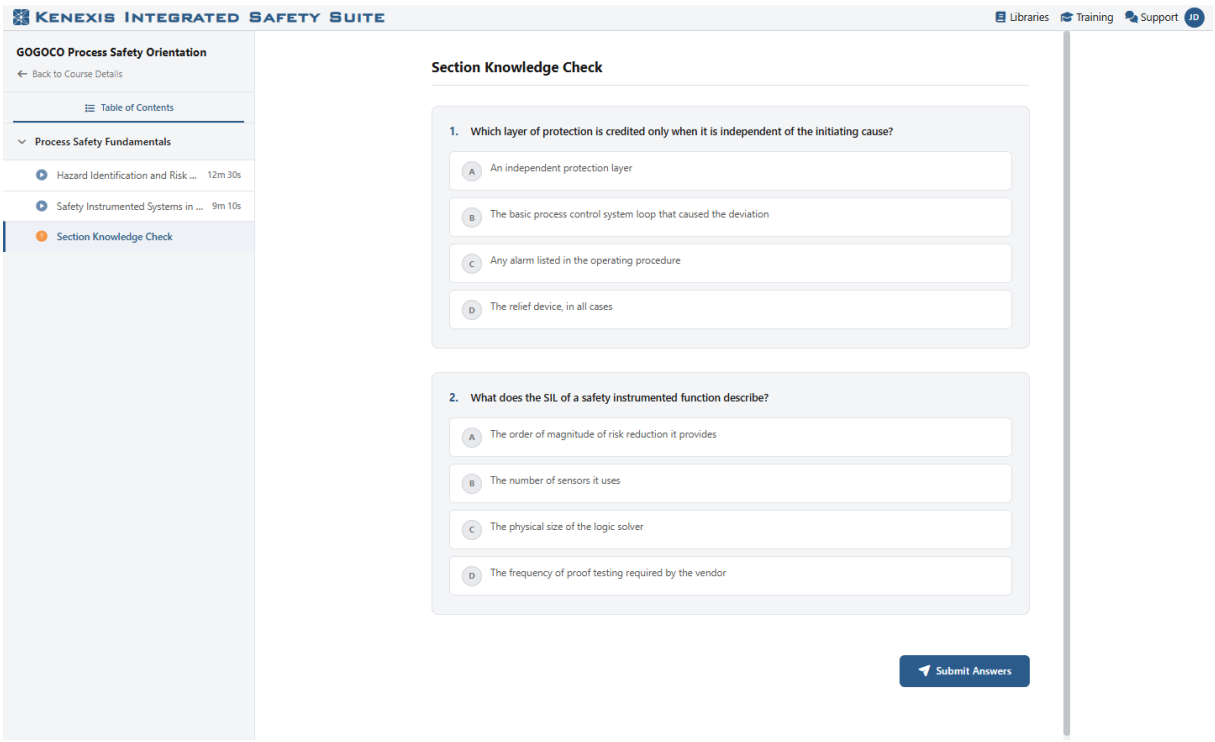



*Figure 4-4. A quiz module, presenting its questions for a single submission.*

Submitting the answers produces a score, both as a percentage and as the number of questions answered correctly, together with the average score other users have achieved. A score above the pass mark stated on the results page completes the quiz; below it, the quiz can be retaken as often as needed, and the results page offers to start it again. Once the final module of a course is complete, the course itself is marked complete and its certificate becomes available from the detail page.

# 5 Facilities

## 5.1 The Role of a Facility

A facility is the top level of the structure that holds study data, and it is also the level at which access is granted. Everything else follows from that: a facility usually represents a physical site, because a site is normally what a given group of engineers works on together, and giving that group access to the facility gives them access to the site's studies in one action.

Facilities are created by users, not by Kenexis. Any user holding the Editor role may create one, and whoever creates a facility owns it.

## 5.2 Creating a Facility

The plus button above the facility list opens the Add New Facility window, which asks only for a name. The new facility appears in the list immediately, owned by you, private, and with all editing permissions granted to those you subsequently authorize. Each of those defaults can be changed afterwards from the facility's own properties.

## 5.3 Facility Details

The gear button above the facility list opens the properties of the selected facility. Any user with access to a facility may view its properties; changing them is reserved for the owner, for a user holding an Administrator authorization on the facility, and for organization administrators who also hold the Editor role. Where an account may view but not change, the window says so at the top.

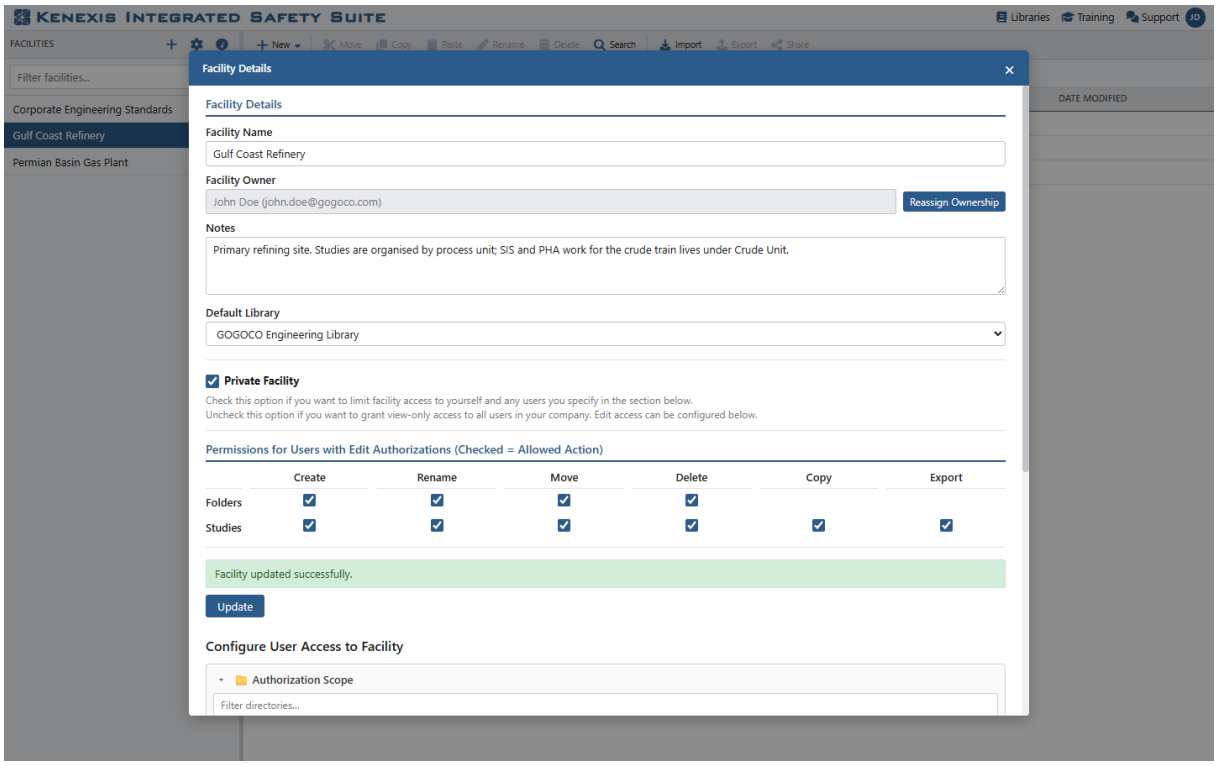



*Figure 5-1. Facility properties, showing the name, owner, notes, and default library.*

The name and the notes are free text. The owner is shown for reference and is changed through the separate process in Section 5.4. The default library determines which library the applications draw reference data from for studies in this facility, and is chosen from those you have access to; libraries themselves are the subject of Chapter 7.

## 5.4 Reassigning Ownership

Ownership moves through the Reassign Ownership panel on the facility properties. It offers the users in your organization, together with anyone outside it you have already granted access to, and it asks what access you wish to keep once ownership has moved.

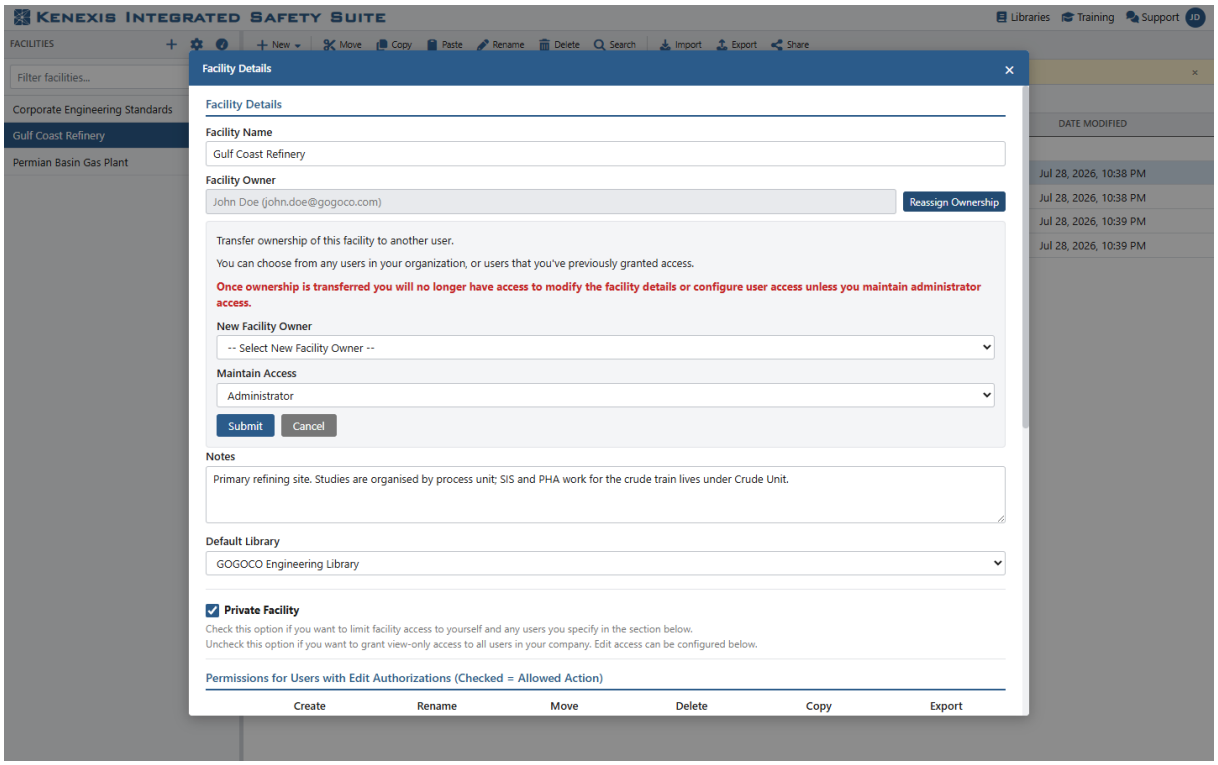



*Figure 5-2. The Reassign Ownership panel, with the access level to retain.*

That second choice deserves attention. Ownership carries the right to change the facility's properties and its authorizations, and transferring it hands those rights to someone else. Retaining Administrator access keeps them; retaining Edit or View access keeps a working relationship with the facility but not control of it; retaining nothing ends your access at the moment the transfer completes. The panel defaults to Administrator. The new owner is notified by email.

## 5.5 Configuring User Access

The Configure User Access section of the facility properties governs who may reach the facility and what they may do there. Three levels of access can be granted.

*Table 5-1. Facility access levels.*

| Access level | What it permits |
|---|---|
| View | Opening and reading studies. No changes of any kind. |
| Edit | Reading studies and changing their data, within the permissions the facility grants to editors. |
| Administrator | Everything Edit permits, and in addition changing the facility's own properties and its authorizations. |

Access need not be granted over a whole facility. The scope selector lists the facility and every folder within it, and an authorization written against a folder reaches that folder and everything beneath it, and nothing else. This is how a contractor working on one process unit is given exactly that unit: the authorization is written on the unit's folder, and the remainder of the facility stays out of view.

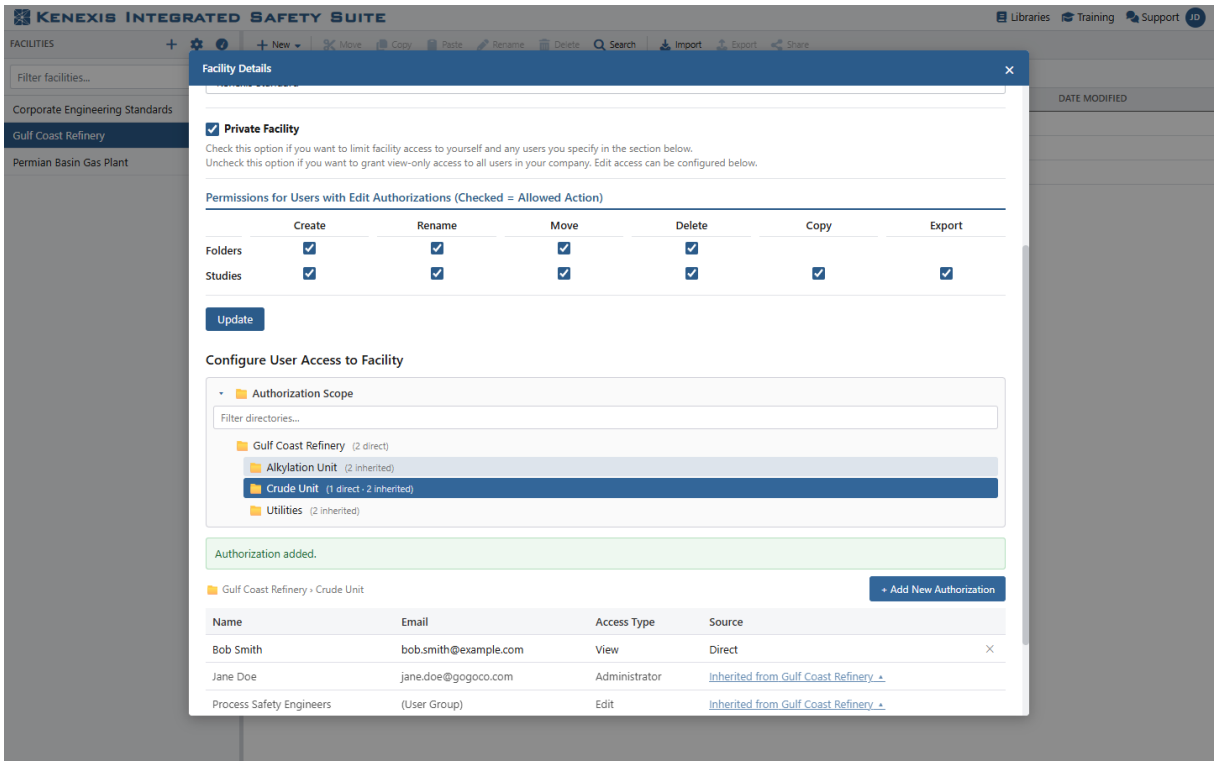



*Figure 5-3. Authorizations in effect at a sub-folder, showing direct and inherited grants.*

The grid lists everyone whose access reaches the selected scope, and the Source column distinguishes how. A direct entry was written at this scope. An inherited entry was written further up and reaches here by descent; selecting it moves the scope selector to wherever it was written, which is the quickest way to find the grant actually responsible for someone's access. The counts beside each folder in the scope selector summarize both kinds at a glance.

Add New Authorization offers four ways to grant access.

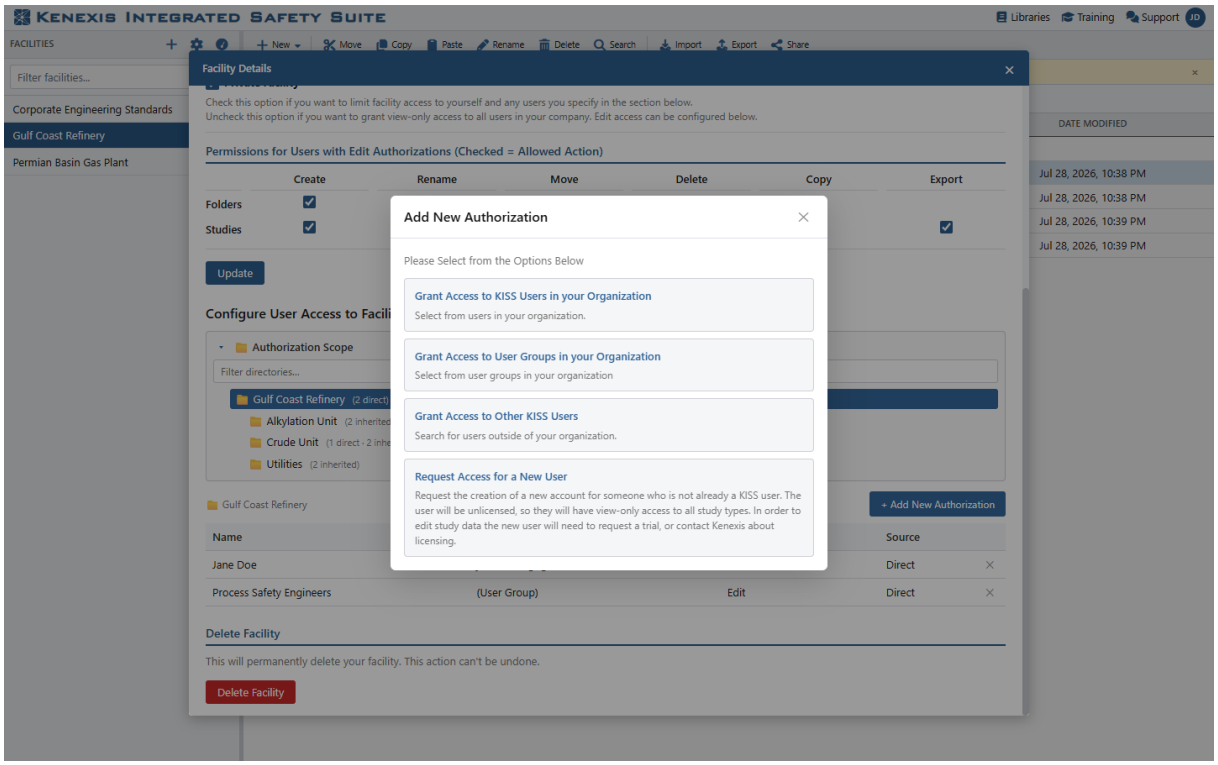



*Figure 5-4. The four ways of granting access to a facility.*

*Table 5-2. Ways of granting access to a facility.*

| Option | Use it to |
|---|---|
| Grant Access to KISS Users in your Organization | Give access to a colleague who already has an account. |
| Grant Access to User Groups in your Organization | Give access to a named group, so that membership of the group carries the access. Section 8.4 covers groups. |
| Grant Access to Other KISS Users | Give access to someone outside your organization, identified by the address their account uses. |
| Request Access for a New User | Ask Kenexis to create an account for someone who does not yet have one, and grant it access. |

The last two options appear where the organization permits sharing outside itself, a setting described in Section 8.2. An account created through the fourth option arrives unlicensed, which means view-only access to study data until a license is arranged.

Granting access to a group rather than to individuals is worth preferring wherever a team is involved. The authorization is then written once, and joining or leaving the team carries access with it, so access ends when someone leaves the group without anyone having to remember the facilities they were granted.

## 5.6 Permissions for Users with Edit Authorizations

An Edit authorization says that someone may change study data. It does not by itself say that they may reorganize the facility. That second question is settled by the permission grid on the facility properties, which applies to everyone holding Edit access to this facility.

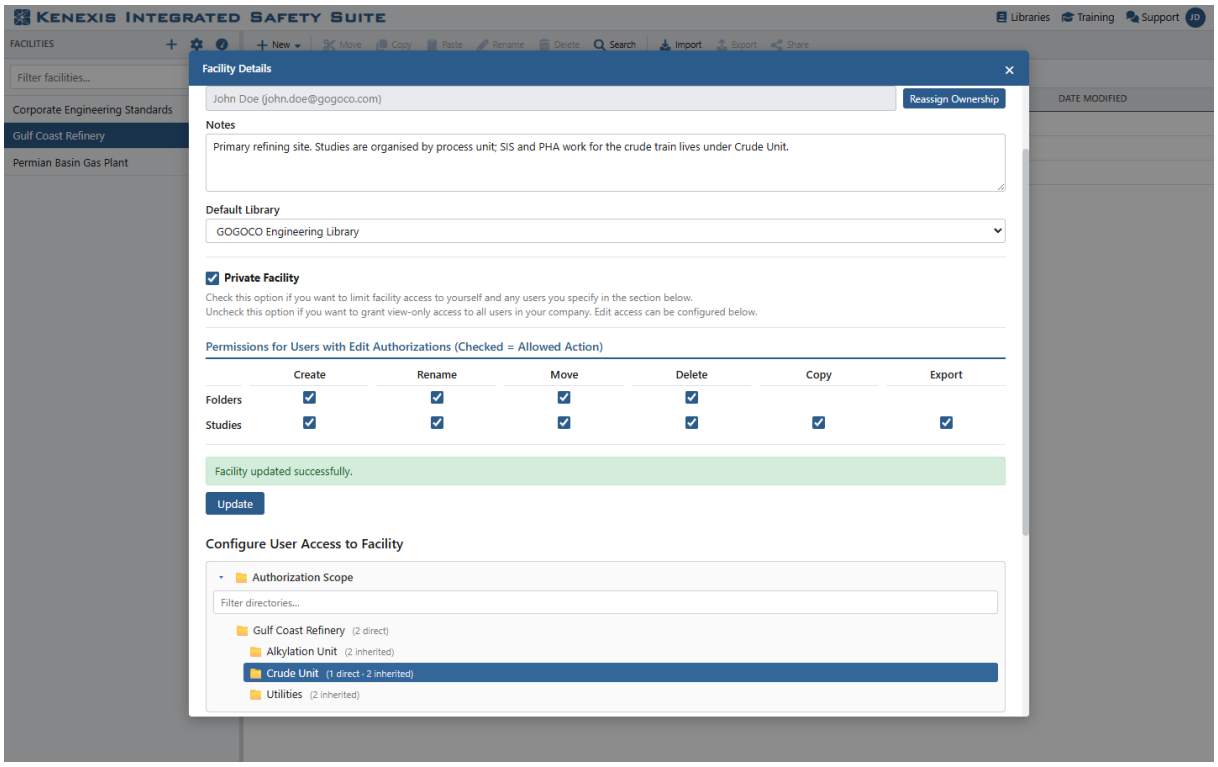



*Figure 5-5. The permission grid governing what users with Edit access may do.*

*Table 5-3. Permissions granted to users with Edit authorizations.*

| Permission | Folders | Studies |
|---|---|---|
| Create | New folders may be created. | New studies may be created, imported, and pasted. |
| Rename | Folders may be renamed. | Studies may be renamed. |
| Move | Folders may be moved. | Studies may be moved. |
| Delete | Folders may be deleted. | Studies may be deleted. |
| Copy | Not applicable. | Studies may be copied. |
| Export | Not applicable. | Studies may be exported to a file. |

Copy and Export apply to studies only, which is why the folder row leaves them blank: folders are not copied, and export produces an application's own study file rather than a folder. Clearing a permission removes the corresponding command from the toolbar for everyone holding Edit access, which is how a facility is made contributable-to without being reorganizable.

The Rename, Move, Delete, Copy and Export settings apply to users holding Edit access; a user holding Administrator access, and the facility's owner, retain those commands whatever the grid says. Create is

the exception, and applies to everyone: clearing it closes the facility to new folders or studies entirely, so that a facility whose contents are final stays that way for its owner as well.

## 5.7 Deleting a Facility

Deleting a facility is offered at the foot of its properties, to the owner and to those holding Administrator access. It takes the facility and everything inside it out of the Study List together, so it asks for confirmation before proceeding.

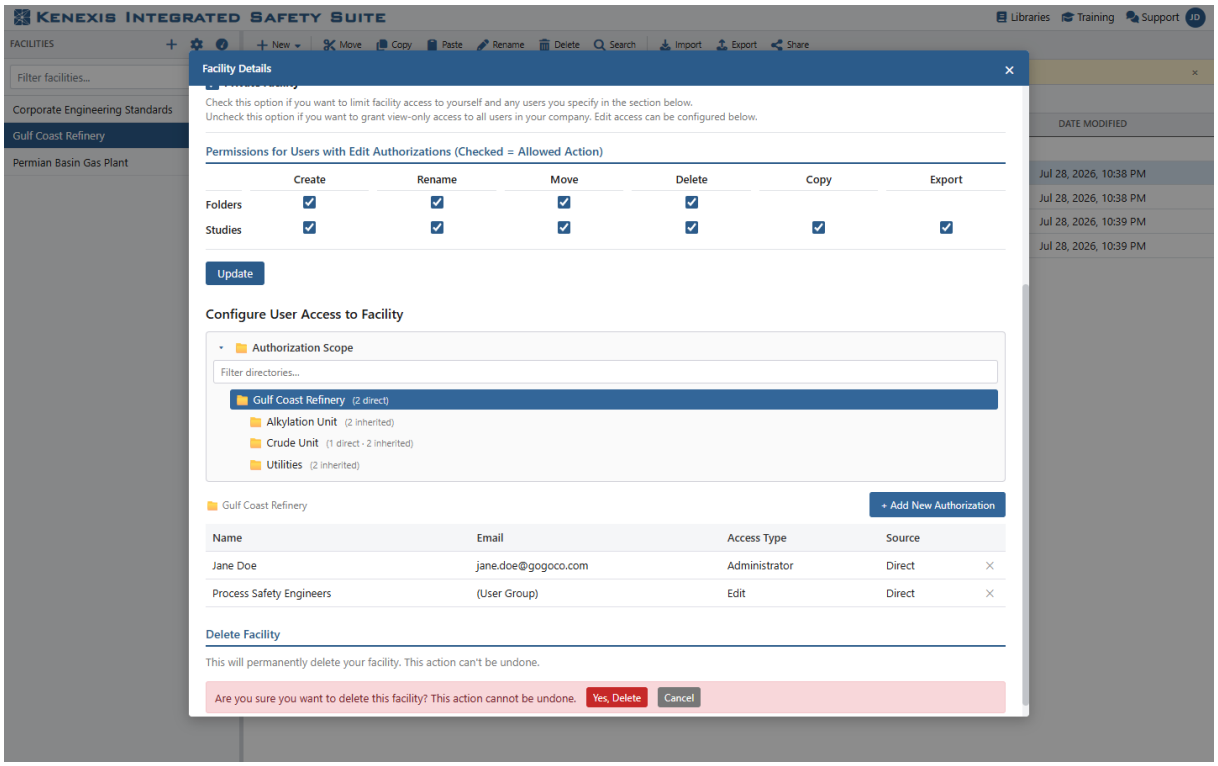



*Figure 5-6. The confirmation shown before a facility is deleted.*

A deleted facility passes to the Recycle Bin, where an organization administrator can restore it, complete with its folders and studies, for ninety days. Section 8.8 describes that process.

## 5.8 The Facility Dashboard

The dial button above the facility list opens the Facility Dashboard, which summarizes the state of the work a facility holds rather than its structure. It reads the studies themselves, so it reflects whatever has most recently been saved in them.

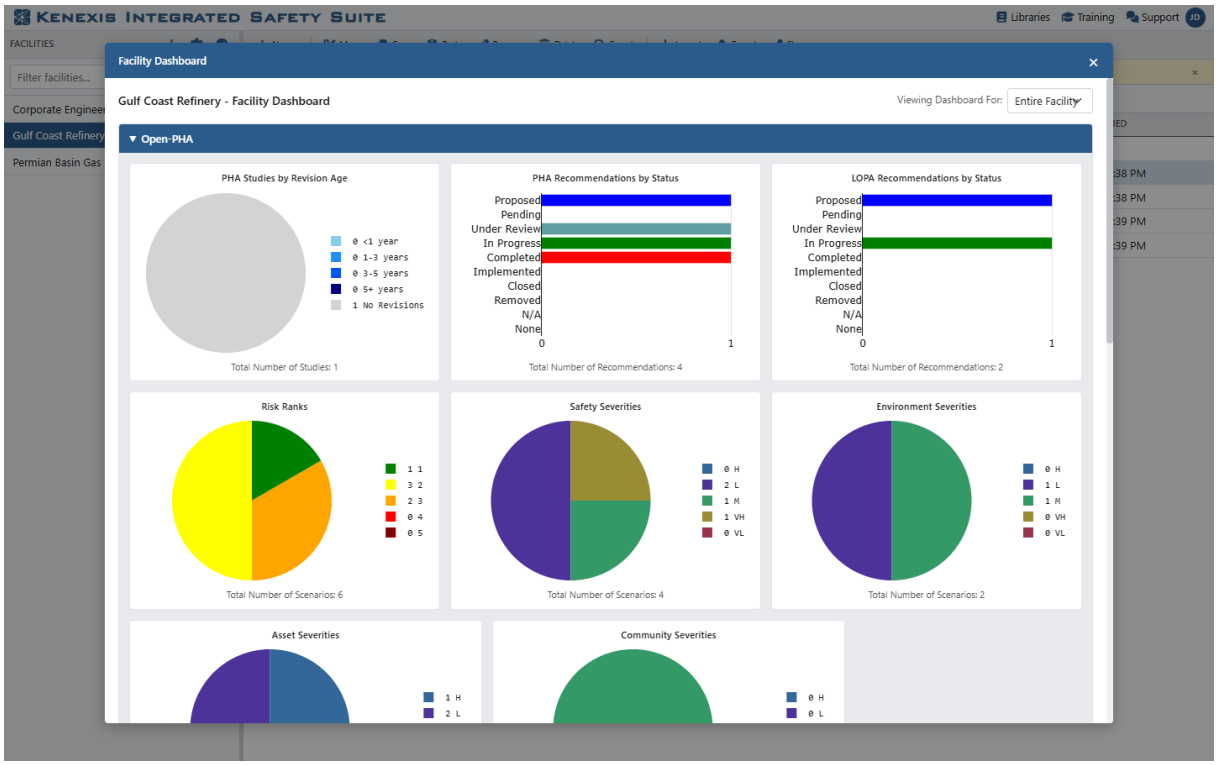



*Figure 5-7. The Facility Dashboard summarizing process hazard analysis data.*

The Viewing Dashboard For selector at the top sets how much is included. It offers the entire facility and every folder within it, so the same charts can describe a whole site or a single process unit — useful when a site's studies are reviewed unit by unit.

The dashboard is arranged in three sections, each drawing on one family of studies. The process hazard analysis section reports how recently studies were revised, the status of their recommendations, and the distribution of risk ranks and severities across their scenarios. The auditing section reports revision age, recommendation status, and scoring. The safety instrumented systems section reports the integrity levels of the functions in the facility, how many have passed verification, the status of testing, and activations recorded over the past year.

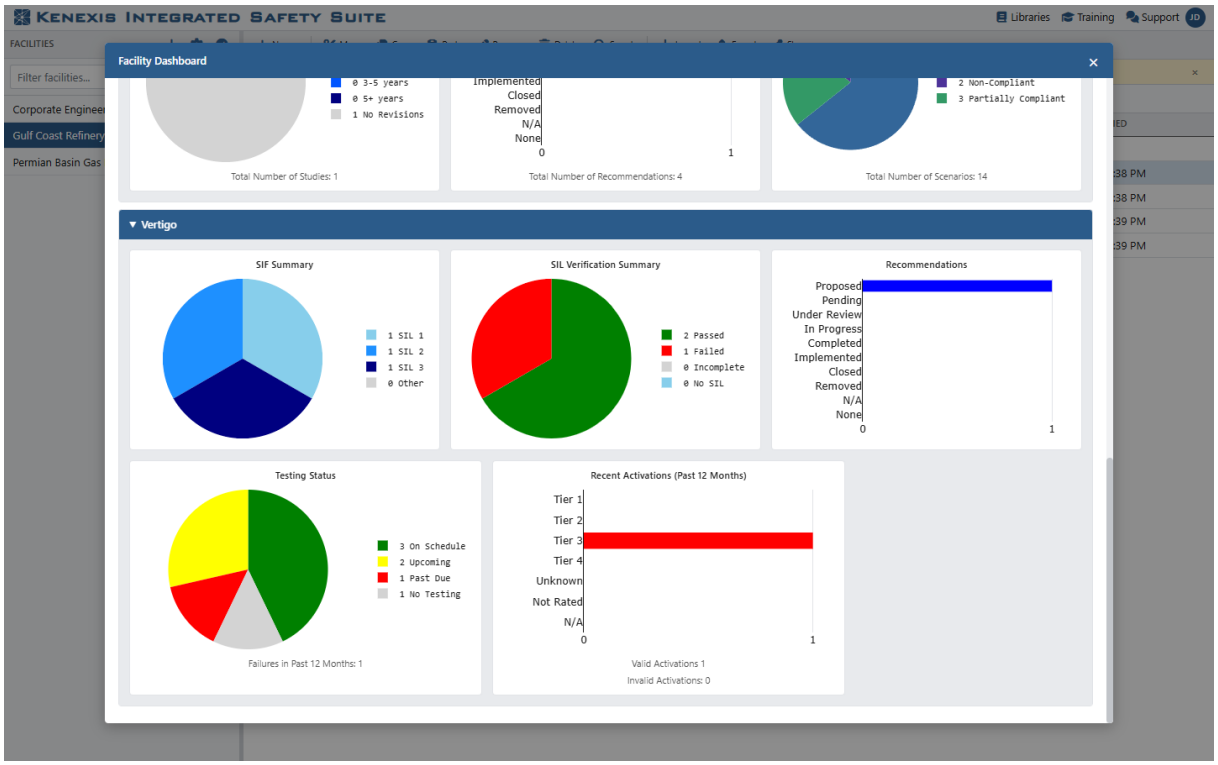



*Figure 5-8. The Facility Dashboard summarizing safety instrumented system data.*

Where a chart would carry more than ten categories it shows the ten most used and says so beneath itself. A section with no studies to draw on reports that instead of showing empty charts.

# 6 Studies and Folders

## 6.1 Creating Studies and Folders

The New command creates both, in whichever folder is currently open. Folders take only a name. Studies take a name and a type, and the menu lists the study types your organization is licensed for, so the menu is itself a statement of what is available to you.

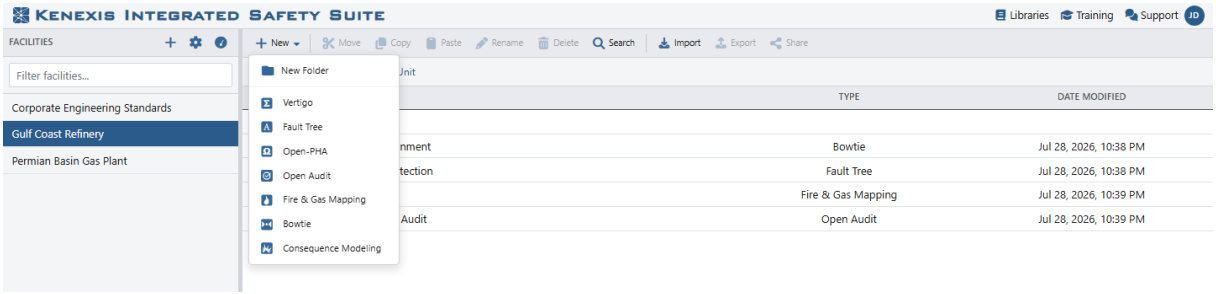



*Figure 6-1. The New menu, listing folders and the licensed study types.*

Most study types then ask for a name and open the new study. Two behave differently and are worth expecting: Open-PHA and Open Audit studies are created and opened directly, without asking for a name first, and are named from within the application. A Fire & Gas Mapping study asks for more than a name, because a mapping study cannot begin without the units, zone dimensions, and analysis elevation it will work in.

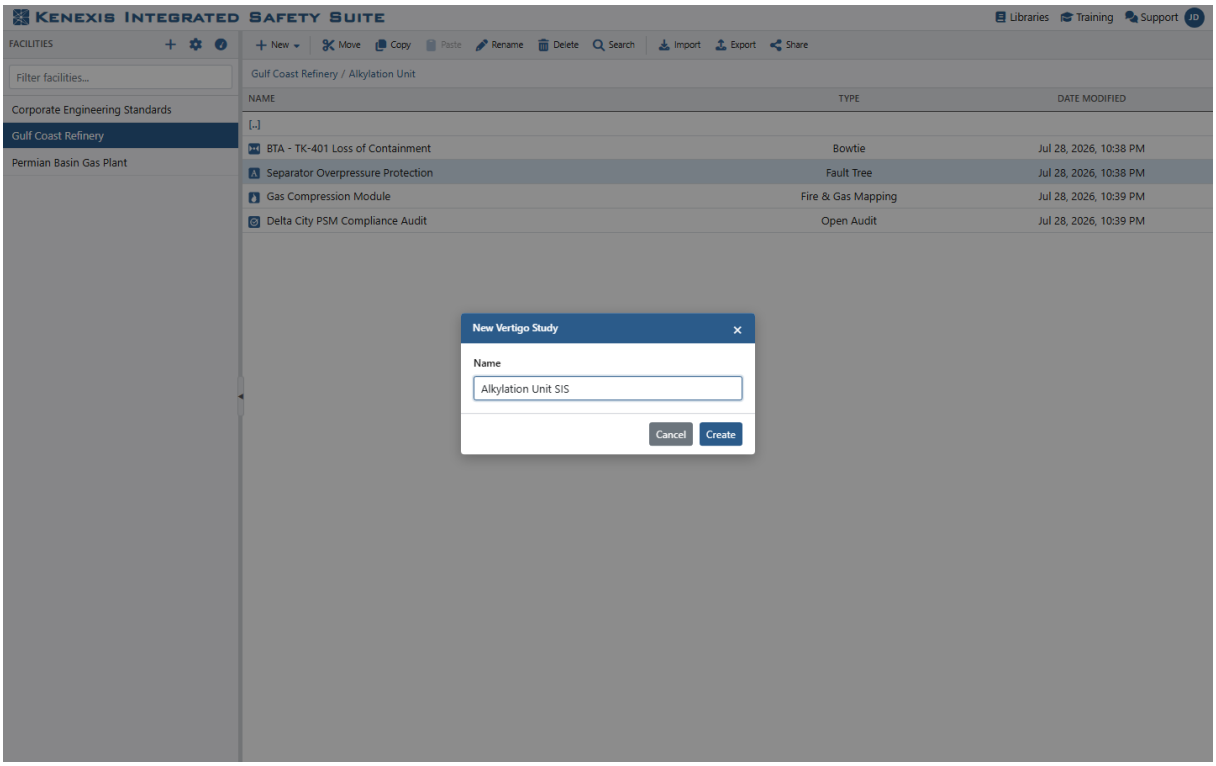



*Figure 6-2. Creating a study.*

Folders may be nested as deeply as an organization finds useful. Because authorizations can be written against any folder, the folder structure is also the structure of access, which is worth bearing in mind when deciding how to arrange a large facility.

## 6.2 Moving, Copying, and Pasting

Move and Copy work through a clipboard. Selecting an item and choosing Move or Copy stages it and enables Paste; navigating to the destination and choosing Paste completes the operation. Nothing changes until Paste is chosen, so an operation begun by accident can be abandoned simply by not completing it.

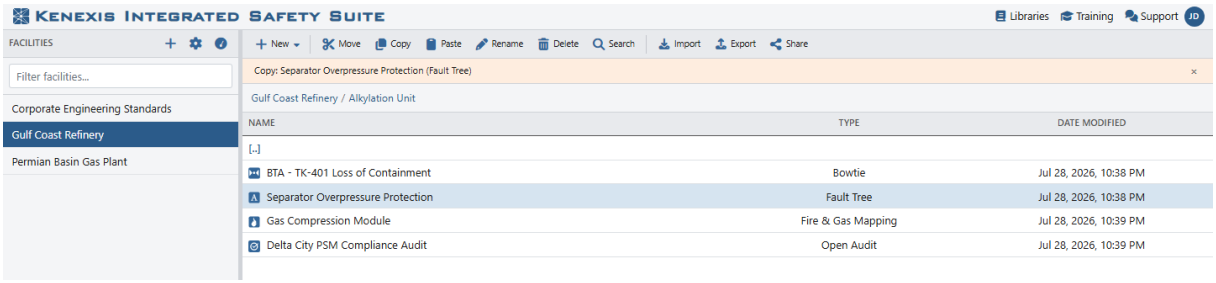



*Figure 6-3. An item staged for pasting, with the destination not yet chosen.*

Move relocates the item. Copy leaves the original untouched and places a duplicate at the destination, named to distinguish it from the original. Copying applies to studies; folders are moved rather than copied.

## 6.3 Renaming

Rename changes the name of the selected study or folder. For a folder this is the only way to do it. A study may also be renamed from inside the application that owns it, and either route produces the same result in the Study List.

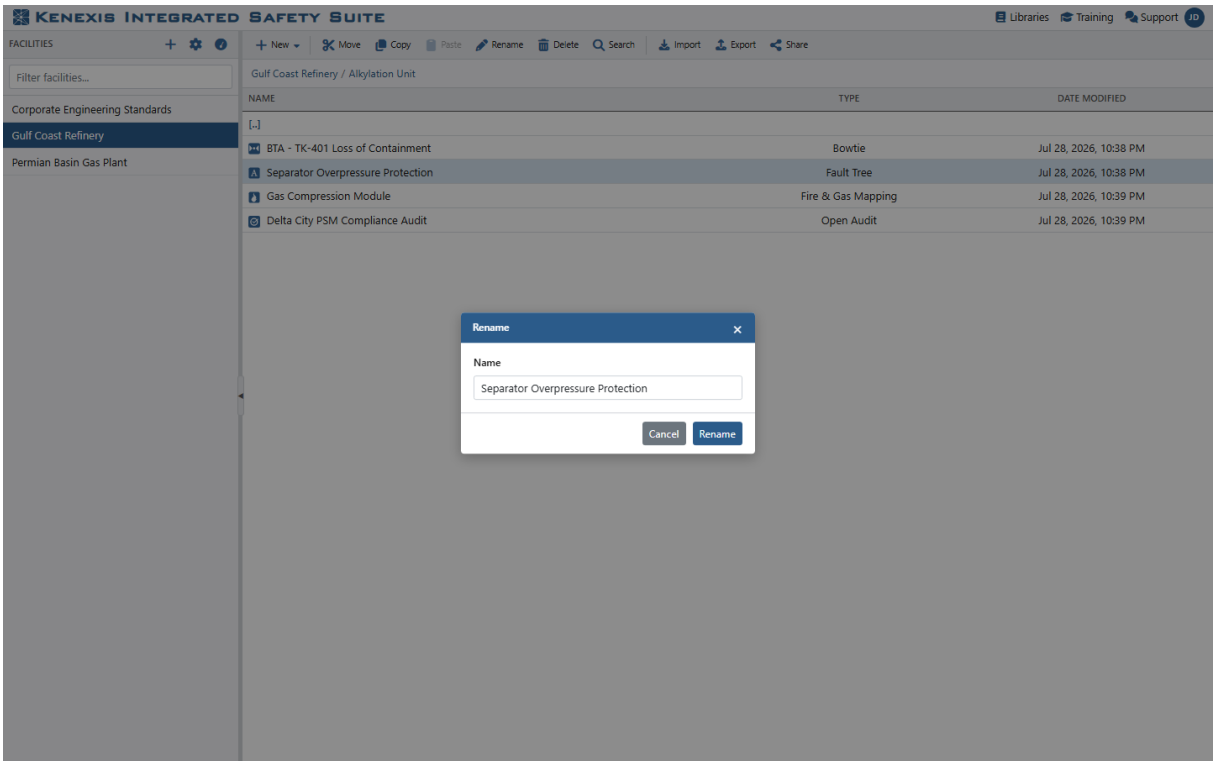



*Figure 6-4. Renaming a study.*

## 6.4 Deleting

Delete removes the selected study or folder. Deleting a folder takes its contents with it, so the confirmation states how many studies are involved — worth reading before continuing, since a folder's full contents are not always visible from where the deletion is begun.

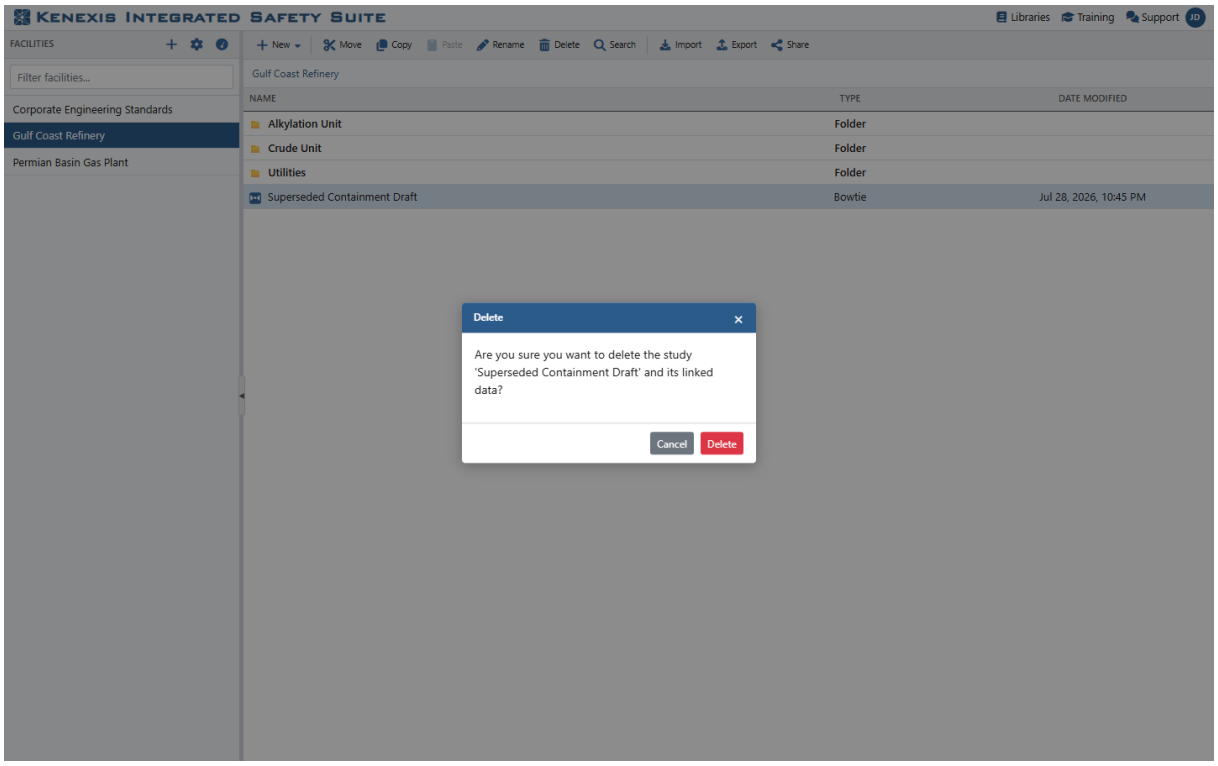



*Figure 6-5. The confirmation shown before a study is deleted.*

Deleted studies and folders pass to the Recycle Bin and can be restored by an organization administrator for ninety days, as described in Section 8.8.

## 6.5 Importing and Exporting a Study

Export writes the selected study to a file on your computer. The format is the one the study's own application uses, and what can be done with that file is described in that application's manual: some are working formats that can be edited offline, others are archives intended for retention. Export is available for study types that support it, where the facility permits exporting and the organization allows data export at all.

Import reads such a file back. Select the facility and folder the study should arrive in, choose Import, and select the file. A valid file is imported and the new study opens immediately, which confirms the import in the most direct way available. Import is available wherever the destination folder permits creating studies.

## 6.6 Sharing a Study by Link

Share produces a link that points directly at the selected study or folder. Sending the link to a colleague saves them navigating to it, which is useful when a study sits several folders deep or when a discussion refers to one particular study.

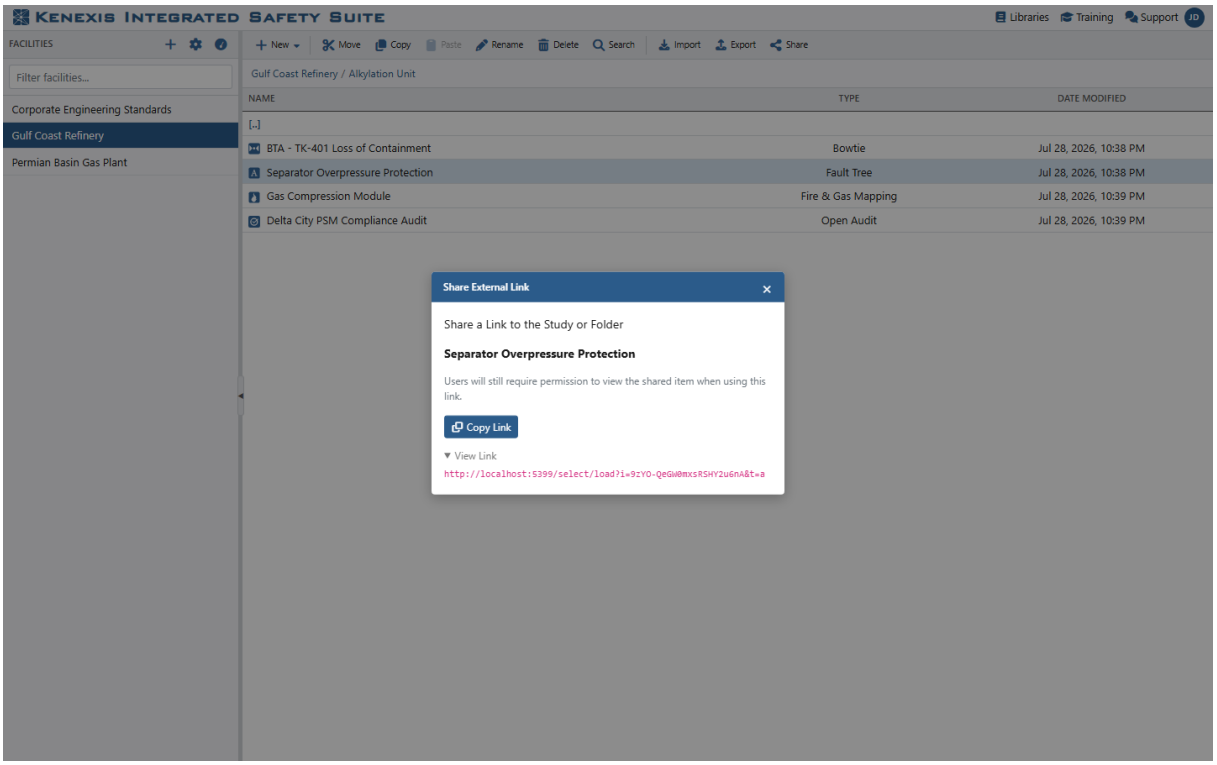



*Figure 6-6. The link produced for a selected study.*

A link carries a location and nothing else. Whoever opens it is taken to the study if their own account is already authorized to reach it, and is returned to the Study List with an explanation if it is not. Sharing a link is therefore a convenience rather than a grant of access, and access itself is still arranged through the authorizations in Section 5.5. A link continues to work after a study is moved, because it identifies the study rather than its position.

# 7 The Library Manager

## 7.1 Libraries and the Kenexis Standard Library

A library holds reference data that studies draw on rather than restate: equipment failure rates, templates, and the standard lists an organization wants used consistently. Keeping this data in a library means a study cites a maintained source, and an organization can hold its engineering standards in one place.

The Libraries link in the navigation bar opens the Library Manager. Every user has read access to the Kenexis Standard Library, which carries the reference data Kenexis maintains — most substantially the failure rate database that safety integrity verification and fault tree analysis draw on. Alongside it, an organization can create libraries of its own.

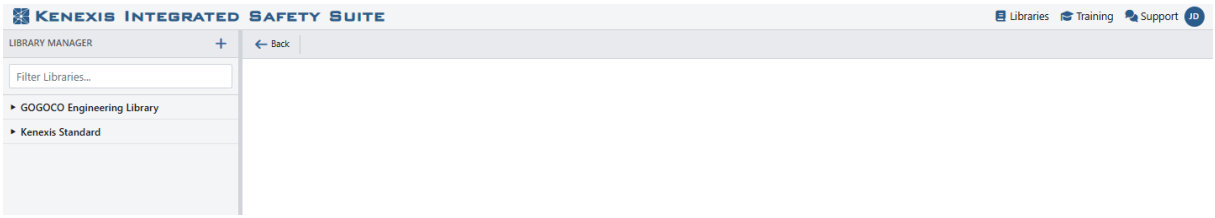



*Figure 7-1. The Library Manager.*

## 7.2 Creating and Managing a Library

The plus button in the ribbon creates a library and makes you its owner. A new library is prepared with a place for every kind of data the organization is licensed to hold, so its structure appears fully formed and is filled in over time.

The remaining ribbon buttons act on the selected library and are offered to its owner: renaming it, managing who may use it, and deleting it. Deleting asks for the library's name to be typed before it will proceed, which is deliberate: a library may be cited by many studies across many facilities. Studies that already cite a deleted library keep the values they took from it, since those values are held in the study; what ends is the ability to take further data from it.

## 7.3 Authorizing Library Users

A library's owner controls who may use it. The Manage Authorizations window lists everyone with access, whether each entry is a user or a group, and the level each holds — View to cite the library's data in studies, Edit to change the data itself.

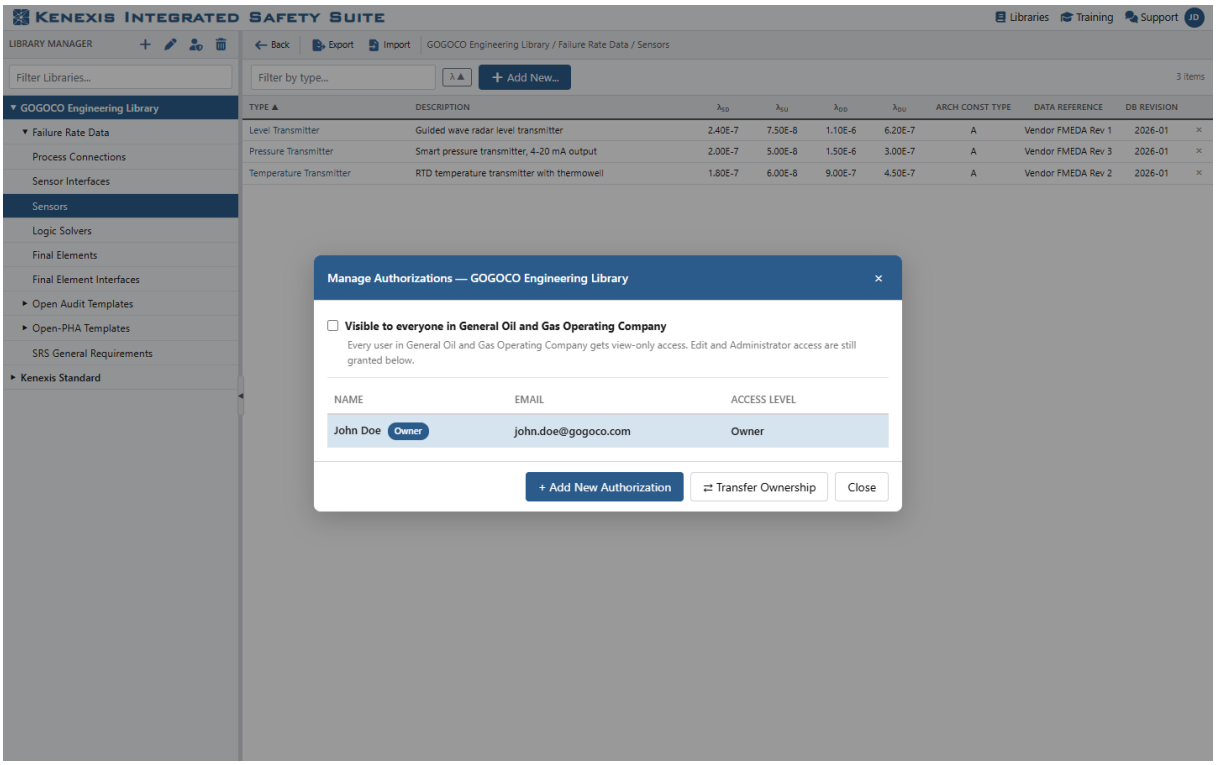



*Figure 7-2. Managing access to a library.*

The first option in the window, “Visible to everyone in” followed by the organization's name, gives every user in the owner's organization View access without listing each of them, so a library meant for the whole organization needs no individual grants. Edit access, and the Administrator level that manages the library, are still granted to individual users and groups below it. The option is offered to the library's owner and to users holding Administrator access, and it takes effect as soon as it is ticked or cleared.

The same window transfers ownership, which asks what access the departing owner should keep and takes effect immediately.

## 7.4 Library Contents

A library is organized in two levels: a category, and the types within it. What appears depends on the applications the organization is licensed for, so a library shows only categories its owner's organization can use.

*Table 7-1. Library categories and their contents.*

| Category | Holds |
|---|---|
| Failure Rate Data | Failure rate data for the components of a safety function, divided by component role: process connections, sensor interfaces, sensors, logic solvers, final elements, and final element interfaces. |
| Open-PHA Templates | Templates and standard lists for hazard analysis: study and study-settings templates, risk criteria, node and checklist templates, and the standard causes, safeguards, enabling events, and conditional modifiers a study offers. |
| Open Audit Templates | Audit category templates. |

| Category | Holds |
|---|---|
| SRS General Requirements | Reusable safety requirement specification documents. |
| Fault Tree Parts | Reusable sections of a fault tree — a gate with the gates and events beneath it — saved from Kenexis Fault Tree and inserted into other studies. |
| Test Procedure Templates | Standard test procedures that Kenexis SIS studies start new proof-test and functional-test procedures from. |

## 7.5 Working with Library Items

Selecting a type lists its items. The grid filters, sorts by any column, and opens an item for editing when its name is selected or its row double-clicked. Add New creates an item of that type, and the cross at the end of a row deletes one after confirmation. All of these are offered to users holding Edit access.

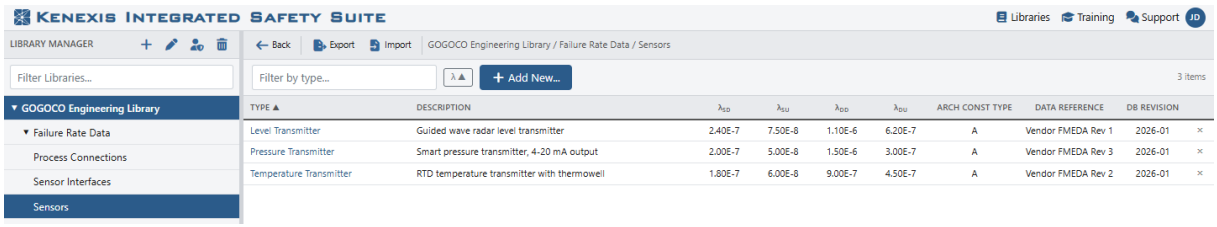



*Figure 7-3. A library's failure rate data.*

Failure rate items can be expressed either as a failure rate with its associated coverage figures, or as the four dangerous and safe failure rates directly. The toggle above the grid switches the columns between the two, and the item window offers the same choice, so data can be entered in whichever form the source provides it.

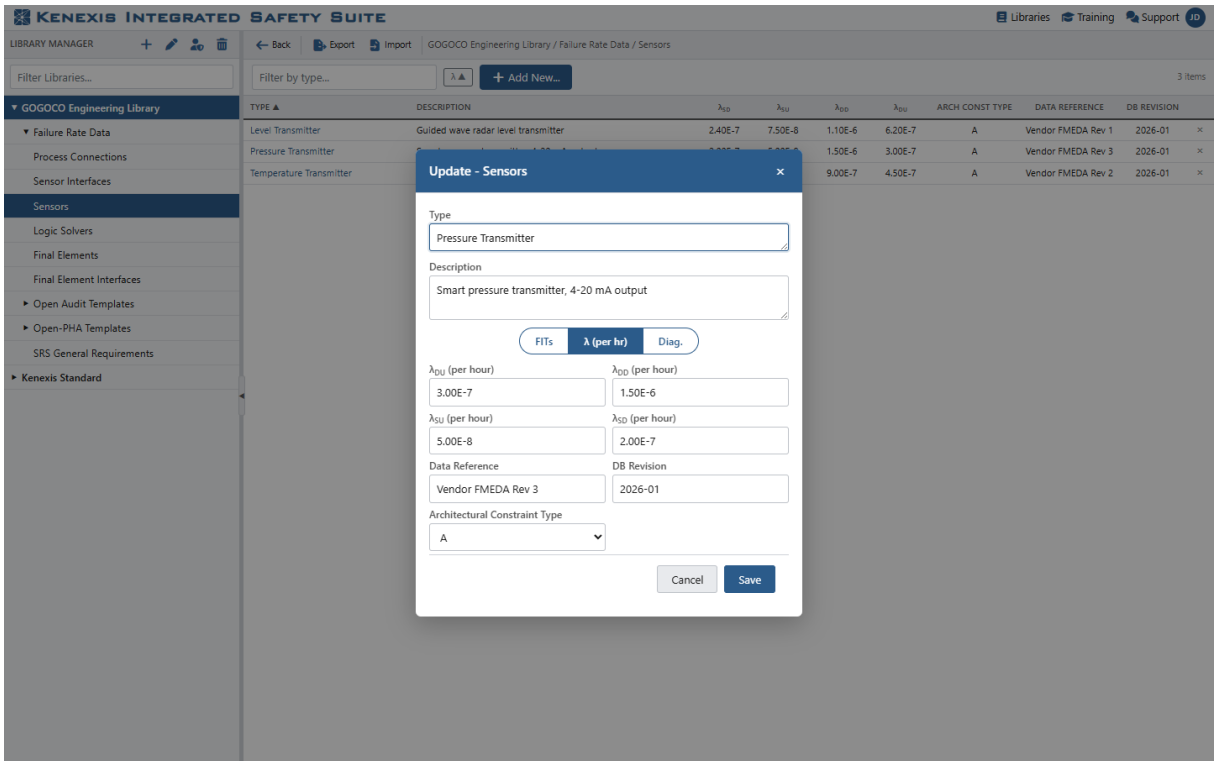



*Figure 7-4. Editing a library item.*

Each item records where its data came from and the revision it belongs to. Filling those in is worth the effort: they are what allows a later reader to trace a number in a study back to its source. Changing a library item does not alter studies that already cite it, which keeps a completed study stable; each application's manual describes how to take an updated value into a study.

Items used in mapping studies additionally report how many places they are used in, and that count opens the list of studies concerned — the quickest way to understand what a proposed change would affect before making it.

Three types hold documents rather than rows of data, and list them by name with the date and author of the last change. Fault Tree Parts are saved from a fault tree in Kenexis Fault Tree; the library lists each part with its size and description, and opening one shows a preview. SRS General Requirements and Test Procedure Templates are written directly in the Library Manager: the plus button above the list adds a new document, the pencil renames one, and opening one shows an editor with headings, lists, tables, links, and images that saves as you type.

An SRS General Requirements document opens with its outline of sections and clauses beside the text. Drag the divider between the outline and the text to widen or narrow the outline; the arrow on the divider hides the outline and shows it again. The browser remembers the width, and whether the outline is hidden.

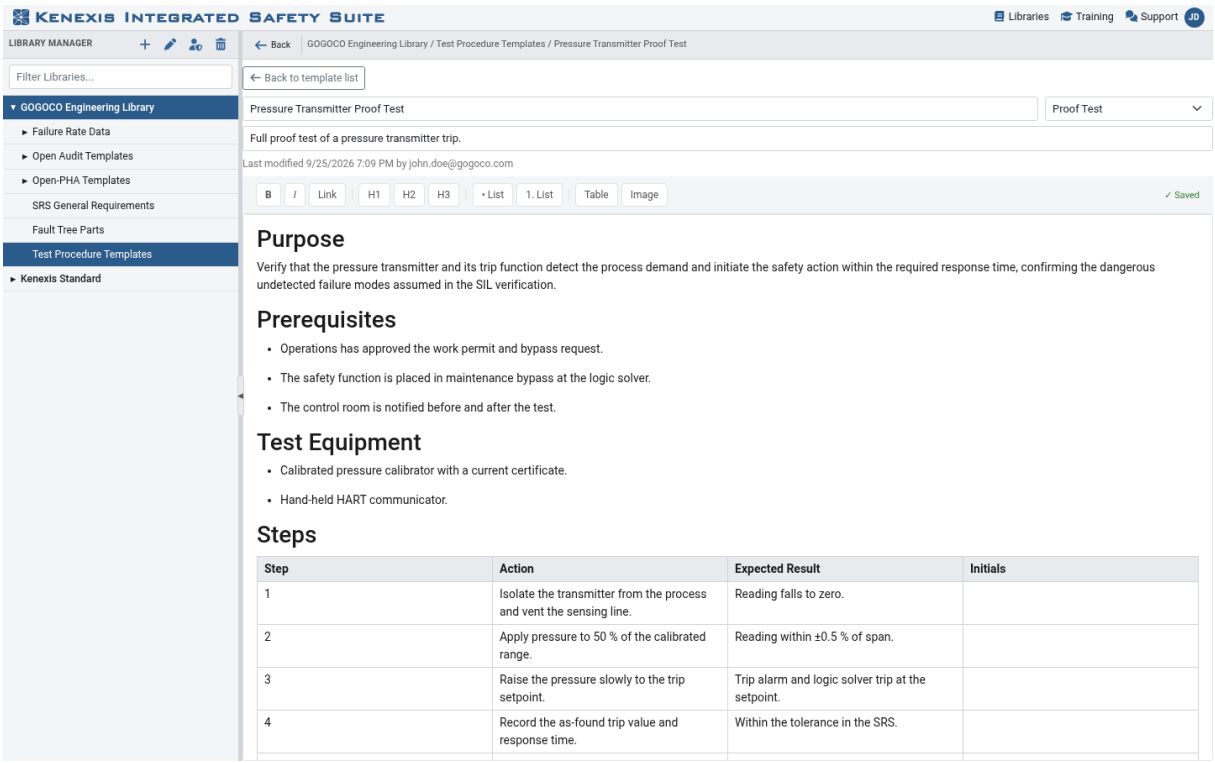



*Figure 7-5. Editing a test procedure template.*

A test procedure template carries a name, a type, an optional description, and the procedure body. A new template starts from the standard procedure outline. When a Kenexis SIS user starts a new procedure from a template, the template's body is copied into the study; later changes to the template leave procedures already created from it unchanged. The Kenexis SIS manual describes the study side.

## 7.6 Appending and Exporting Library Data

Export writes the selected type's items to a spreadsheet, and Import reads a spreadsheet back, appending its rows to the type currently selected. Together they are how a substantial body of data is brought in at once, rather than item by item.

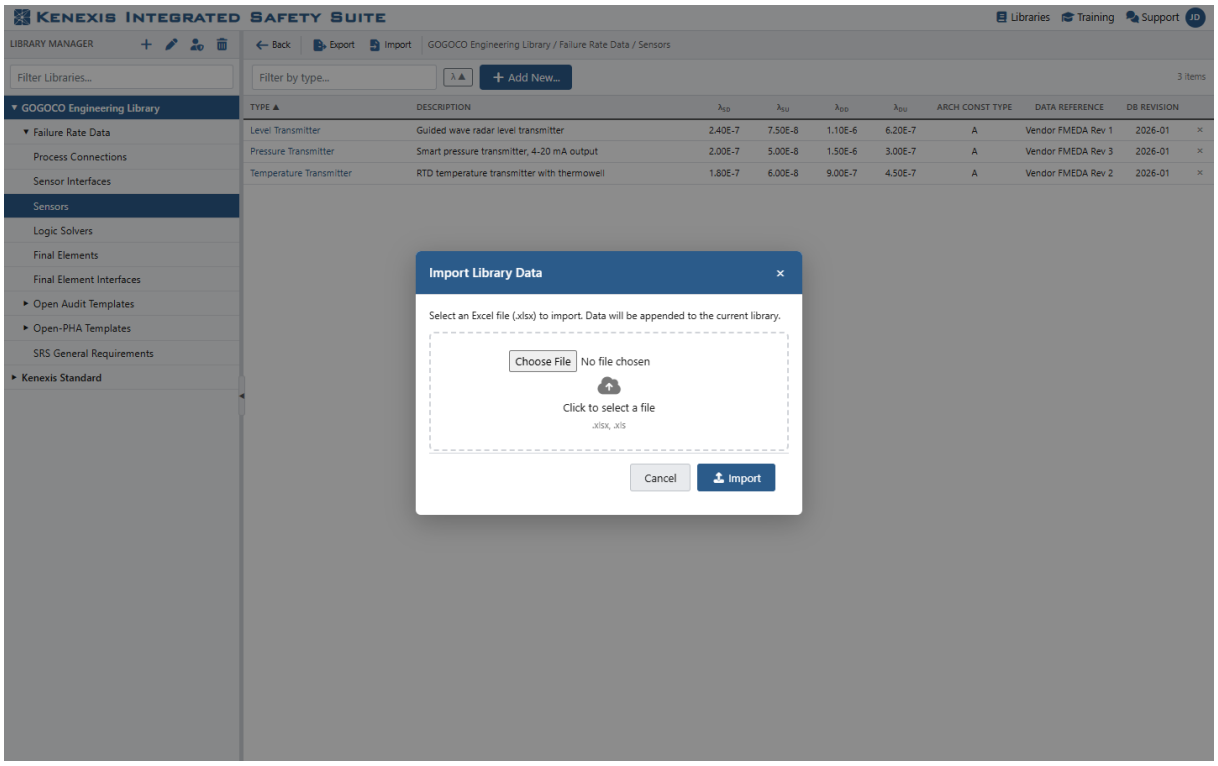



*Figure 7-6. Importing library data.*

Exporting first is the reliable way to get the format right. The exported spreadsheet has exactly the columns the import expects; clearing its rows and entering new ones produces a file that will import cleanly. Because import appends, the file should contain only the items being added.

## 7.7 Assigning a Default Library to a Facility

A facility names one library as its default, and studies in that facility draw reference data from it. The setting is on the facility's own properties, described in Section 5.3, and offers every library you have access to. Setting it deliberately is what ensures a site's studies all cite the same source.

## 7.8 Returning to the Study List

The Back button in the ribbon returns to the Study List.

# 8 Organization Administration

## 8.1 Opening Organization Administration

When an organization takes its first license, Kenexis asks it to nominate one or more administrators. They manage the organization's settings, its users, its groups, and its licenses. The account panel described in Section 2.4 carries the entry into these settings for accounts that hold an administrative role, labeled with the organization's own name.

The settings are arranged as tabs down the left of the page. Which appear depends on the roles held; the mapping is in the table in Section 3.4. An organization administrator sees all of them, while a user administrator sees those concerned with users, groups, and licenses.

## 8.2 Security and Privacy

The first tab holds the settings that apply across the whole organization.

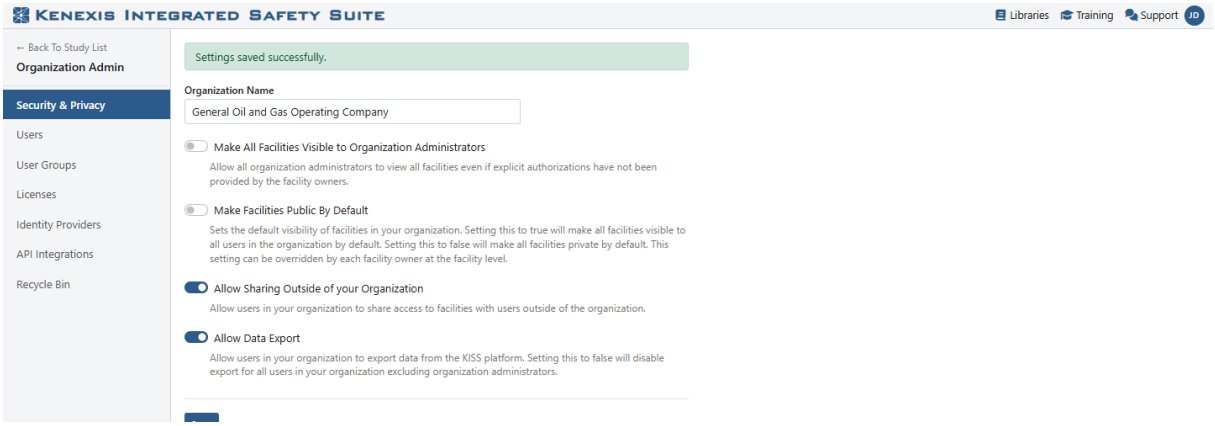



*Figure 8-1. Organization security and privacy settings.*

The organization name appears wherever the organization is identified, including in the account panel.

Four switches follow, and each is worth a deliberate decision rather than being left at its default.

*Table 8-1. Organization security and privacy settings.*

| Setting | What enabling it does |
|---|---|
| Make All Facilities Visible to Organization Administrators | Lets organization administrators see every facility owned within the organization, including private ones they have not been granted access to. Left off, a private facility stays private even from an administrator. |
| Make Facilities Public By Default | Makes each newly created facility visible to the whole organization rather than private. The creator can still override this on the facility itself. |
| Allow Sharing Outside of your Organization | Lets users grant access to people outside the organization, and enables the last two options of the authorization wizard in Section 5.5. |
| Allow Data Export | Lets users export study data to files. Left off, export is withheld from users while remaining available to organization administrators. |

The first of these deserves particular thought. Facilities are private by default, which means an administrator cannot necessarily see the data their own organization holds. Enabling it gives administrators oversight of everything; leaving it off keeps each facility's contents to the people its owner has chosen. Which is right depends on whether the organization treats administration as custodianship of all its data or as a purely clerical role.

## 8.3 Users and Roles

The Users tab lists everyone in the organization with the roles and groups each holds, and filters by any column.

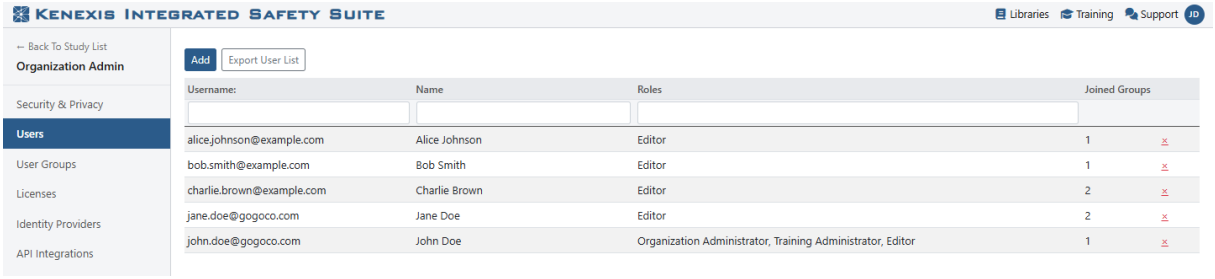



*Figure 8-2. The organization's users, with their roles and group membership.*

Add creates an account, asking for an address, a name, and the roles to grant.

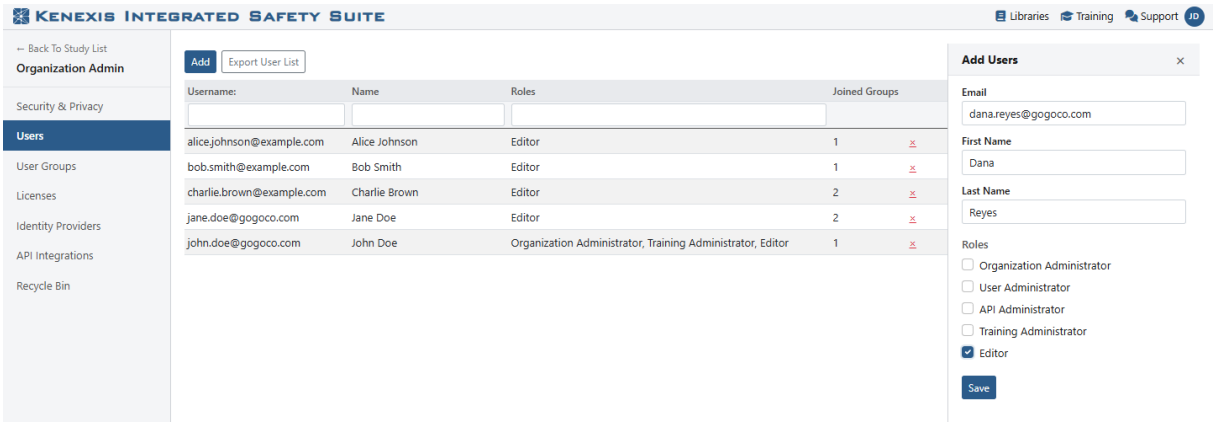



*Figure 8-3. Adding a user to the organization.*

Roles are described in Section 3.4. Most users need only Editor. The three administrative roles — Organization Administrator, User Administrator, and API Administrator — are granted by an organization administrator; a user administrator may grant Editor and Training Administrator, which allows day-to-day user management to be delegated without also delegating control of the organization's security settings.

Where the address given already belongs to an account at another organization, the page says so and offers to add that existing account rather than create a second one, which keeps a single identity for someone who works across organizations.

Selecting a user opens their details.

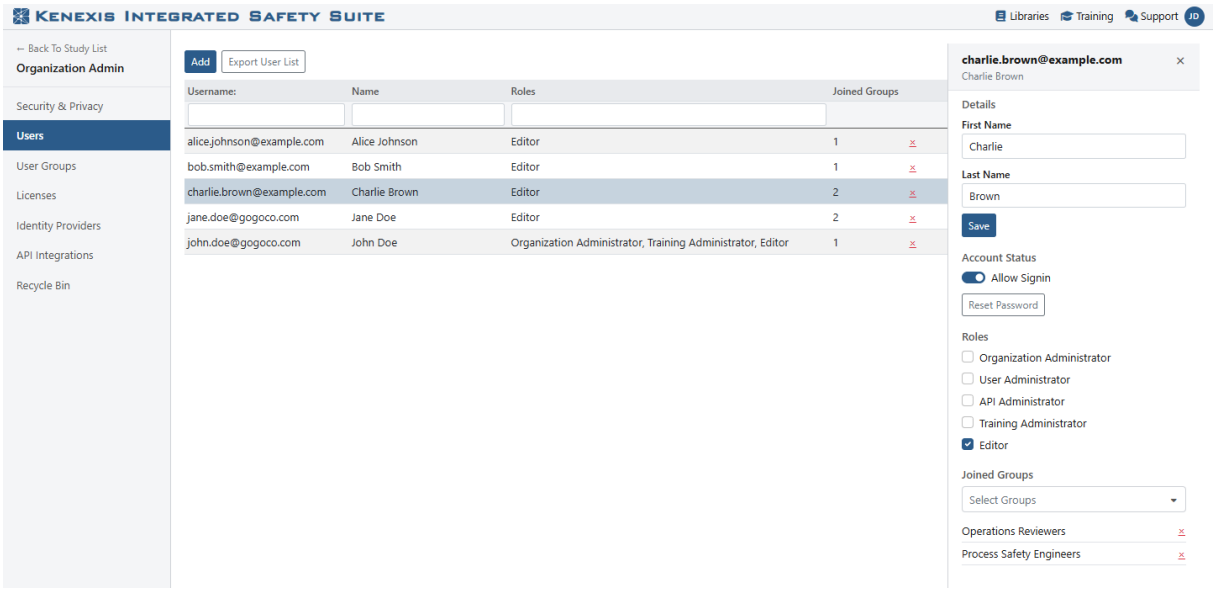



*Figure 8-4. A user's details, roles, and group membership.*

Their name can be corrected, their roles changed, and their group membership managed from here. The account status section governs access itself: sign-in can be withdrawn while leaving the account and its data in place, an account locked by repeated failed sign-ins can be unlocked, and a password can be reset. A reset produces a temporary password shown once, on screen, for you to pass to the user — it is not shown again, so it needs to be copied before the window is closed.

Deleting a user asks which user their data should be reassigned to, and asks for the user name to be typed to confirm. The reassignment matters: facilities, studies, and libraries have owners, and deleting an account without saying where its property should go would leave that property without one.

## 8.4 User Groups

A group is a named set of users that can be granted access as a single entity. Where a team works on the same facilities, granting access to the group rather than to each member is both quicker and safer, because access follows membership and ends when someone leaves the group.

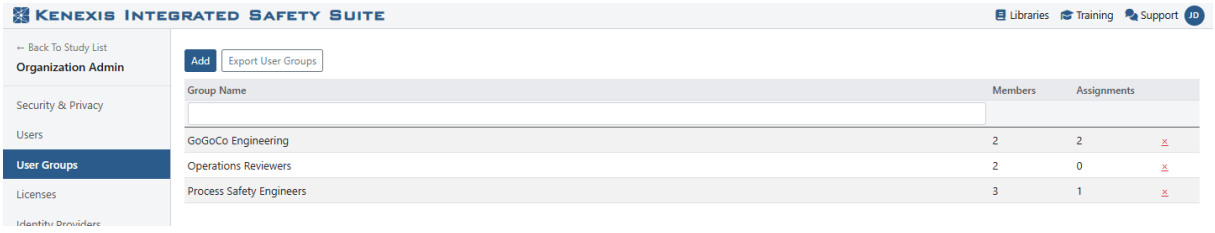



*Figure 8-5. The organization's user groups.*

The list shows each group's membership count and how many authorizations have been written against it. Selecting a group opens it.

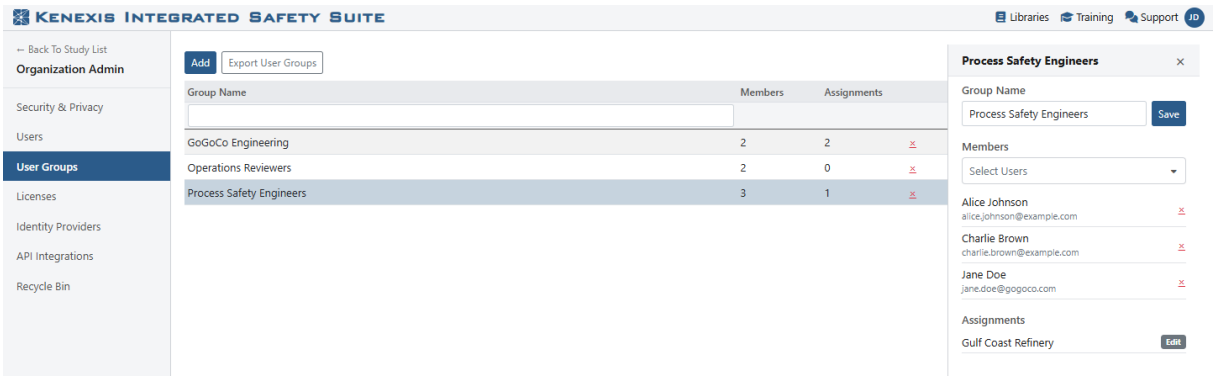



*Figure 8-6. A group's membership and the facilities it has been granted.*

Members are added and removed from here. The assignments section lists the facilities and folders the group has been granted, which answers the question a group's own page ought to answer: what does membership of this group actually give someone. Removing a member, or deleting a group, withdraws the access that membership carried.

## 8.5 Licenses

The Licenses tab reports what the organization is licensed for, how much of each license is in use, and when each expires.




*Figure 8-7. The organization's licenses.*

Most licenses are concurrent: they set how many people may use an application at the same time rather than how many may be registered to use it. For those, the Licenses in Use figure is a live count, and selecting it lists the sessions currently holding a license, with the user, the time the session began, and the study being worked on. A session can be released from that list, which is how a license held by a machine left signed in overnight is recovered. Licenses that do not work this way report no concurrent figure.

When every license for an application is in use, a user with editing rights still opens a study, read-only, with a notice below the study header naming the colleagues holding the licenses; reopening the study once a license is free restores editing. Creating a new study needs a free license.

Expiry dates are shown for each application, and an expired license is marked as such. Requesting more licenses, or a longer term, is done from the same page.

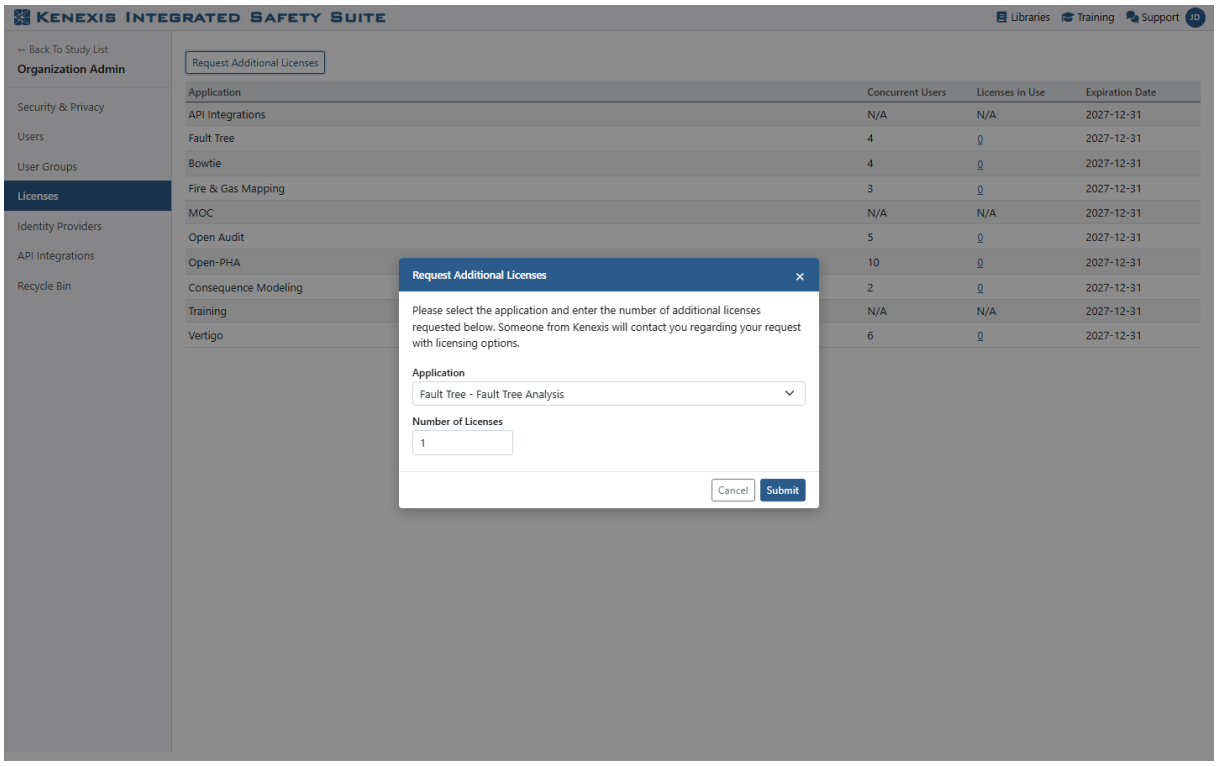



*Figure 8-8. Requesting additional licenses.*

The request names the application and the number of licenses wanted, and reaches Kenexis directly; a member of staff then follows it up.

## 8.6 Identity Providers

An organization that manages identities centrally can have its users sign in with corporate credentials rather than a password held by Kenexis. The Identity Providers tab registers the provider that will authenticate them.

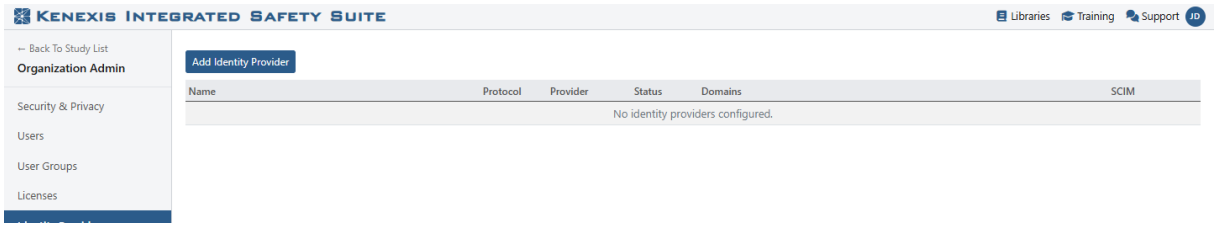



*Figure 8-9. Registered identity providers.*

Both OpenID Connect and SAML are supported, with templates for the common providers. A registration records where the provider lives, the credentials the platform uses to talk to it, and how the provider's claims map onto a user's email address, name, and groups. A connection can be tested from the page before it is relied on, and a provider can be registered while disabled so that configuration is settled before anyone is asked to use it.

Require for Company governs which sign-in methods your users are offered. Left off, the sign-in page presents the provider alongside the password field, which suits a staged rollout while some users are not yet in the provider; turned on, single sign-on becomes the only route and users are taken to the provider as soon as they enter their user name. The setting becomes available once the provider is enabled, so that a provider still being configured cannot become the sole way in.

The same page enables automatic provisioning, so that accounts are created on first successful sign-in, and SCIM, so that the provider can create, update, and deactivate accounts directly. Enabling SCIM produces a bearer token, shown once for you to record in the provider's configuration.

Configuring single sign-on end to end involves work in your own identity provider as well as here. The Kenexis User Provisioning Guide covers that process for each supported provider and is the right companion to this section; contact support@kenexis.com for a copy.

## 8.7 API Integrations

Organizations holding an API license can let external systems read and write study data programmatically. An integration is scoped to a single study, which keeps the reach of any one token to exactly the data it was issued for.

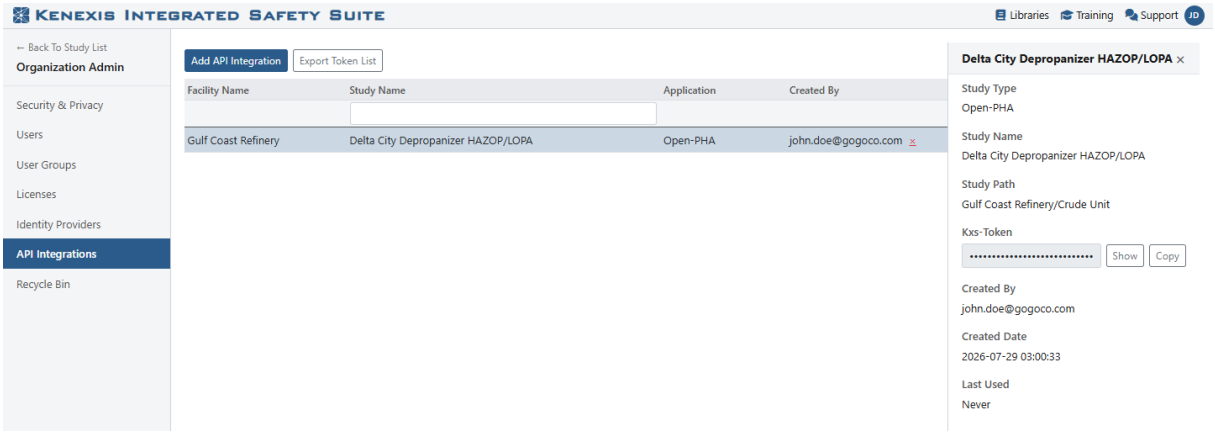



*Figure 8-10. API integrations.*

Creating an integration asks for the study type, the facility, and then the study itself. It produces a token, which the external system sends with each request. The token is shown masked and can be revealed and copied by those entitled to see it. The list records who created each integration and when it was last used, which is what allows an unused integration to be identified and removed.

## 8.8 The Recycle Bin

Deleting a facility, folder, or study does not destroy it. It passes to the Recycle Bin, where an organization administrator can restore it for ninety days.

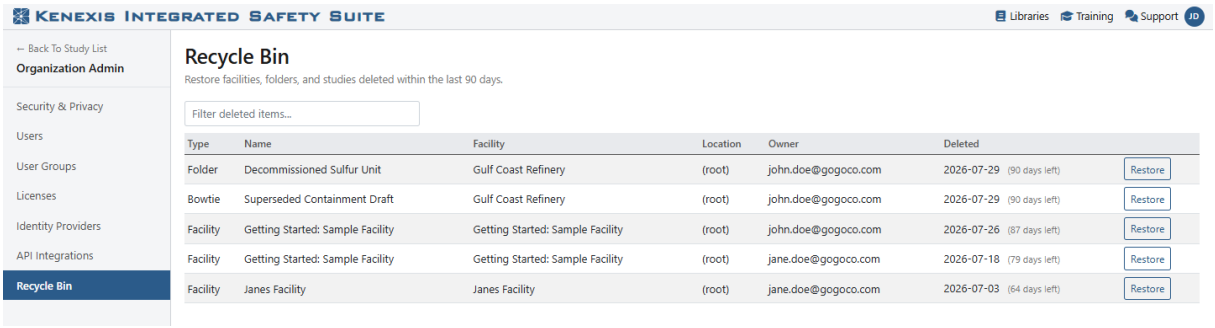



*Figure 8-11. The Recycle Bin, listing items deleted within the last ninety days.*

Each entry records what the item is, where it was, who owned it, when it was deleted, and how many days remain to restore it. Restoring an item also restores whatever was deleted along with it, so restoring a folder brings back the studies it contained. Items deleted more than ninety days ago are removed permanently.

Restoration is reserved for organization administrators, and reaches only items belonging to their own organization. Change requests raised in Kenexis MOC are managed within that application rather than here.

# 9 Training Administration

## 9.1 Managing Courses

A training administrator manages the organization's courses and tracks who has completed them. The Course Builder button on the Training hub opens the course list.

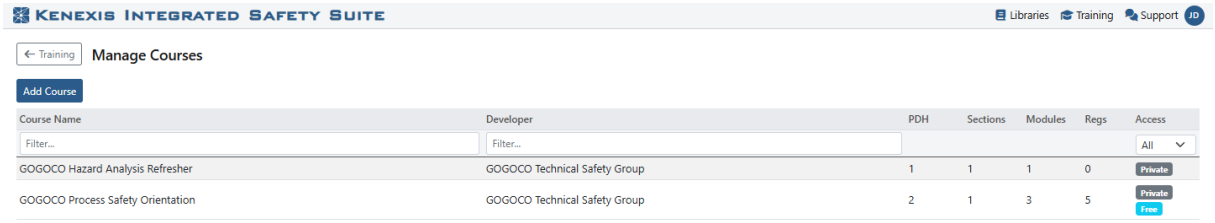



*Figure 9-1. The organization's courses.*

The list reports each course's developer, the professional development hours it carries, how many sections and modules it contains, how many people are registered on it, and whether it requires a license. Add Course creates one, asking for a title, a description, the professional development hours, the developer and presenter, and the subject tags under which it will appear on the hub. Marking a course Free makes it available without a training license.

A course also carries a thumbnail and a preview video, both uploaded from the same page; these are what the hub shows on the course's card and banner. A certificate signature, a PNG image, is uploaded there too; it is printed above the instructor's name on the course certificate, and removing it leaves later certificates unsigned. Course Documents holds the handouts learners download from the course page and the course player, such as a workbook or an exercise file: a PDF, Word, Excel, PowerPoint, text, CSV, or ZIP file of up to 100 MB each, listed by file name, each with its own Remove button. Deleting a course removes its sections, modules, quiz questions, and registrations together, and says so before proceeding.

## 9.2 Building a Course

Open Builder opens the course's structure. Content is arranged as sections, each holding an ordered list of modules.

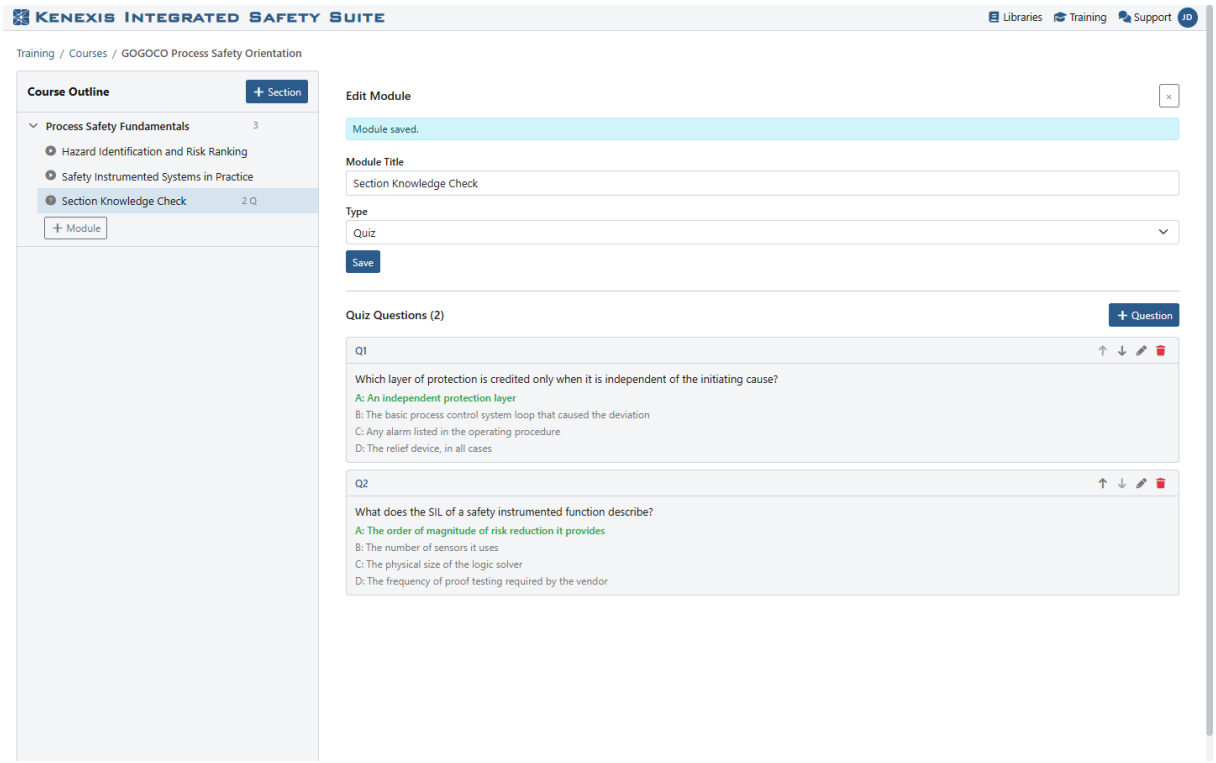



*Figure 9-2. The Course Builder, editing a quiz module.*

Sections and modules are added from the outline on the left and reordered with the arrows beside each, so a course can be restructured after it has been written. A module is either a video or a quiz, chosen on the module itself.

A video module takes a single MP4 file. Once uploaded, the builder reports its length, which is the length the hub and the course detail page will show, and the file can be replaced later without disturbing the rest of the course.

A quiz module holds a list of questions. Each question carries its text, four answers, and a marker on the correct one, and may carry an image where the question depends on a diagram. Questions are reordered and removed from the same list. A learner must score above the pass mark shown on the results page to complete the quiz, and may retake it as often as necessary.

## 9.3 The Training Matrix

The Training Matrix is the record of who has been trained on what. Its rows are the users holding a training license and its columns are the courses being tracked, so a single page answers the question a training program exists to answer.

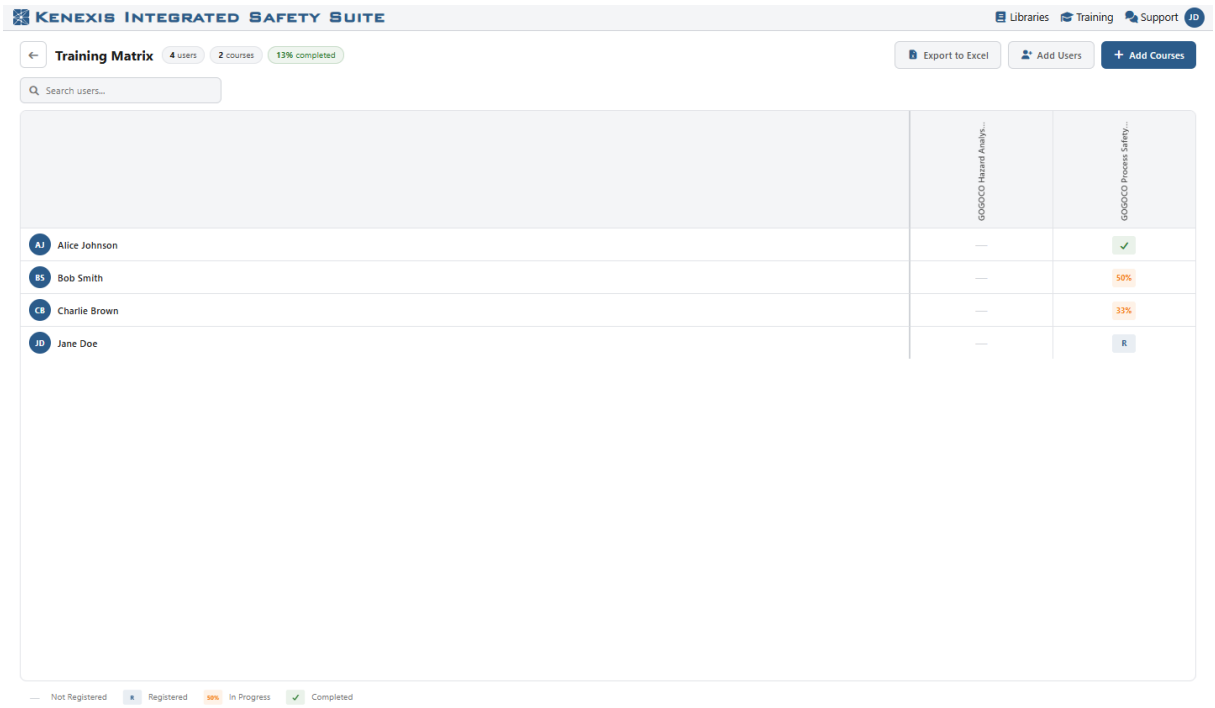



*Figure 9-3. The Training Matrix.*

Each cell reports one user's position in one course. A dash means they are not registered; R means registered but not started; a percentage means in progress; a tick means complete. The summary at the top counts the users and courses being tracked and the average completion across them.

Three actions build the matrix. Add Users assigns training licenses to users who do not yet hold one, which is what puts them in the matrix at all. Add Courses brings a course into the matrix to be tracked. Selecting a course's column heading registers users onto that course, and offers to stop tracking it.

Selecting a user's name opens their record: how many courses, modules, and quizzes they have completed over the past year and in total, their average quiz score, and the time they have spent, together with tabs listing all their courses, those in progress, and those finished.

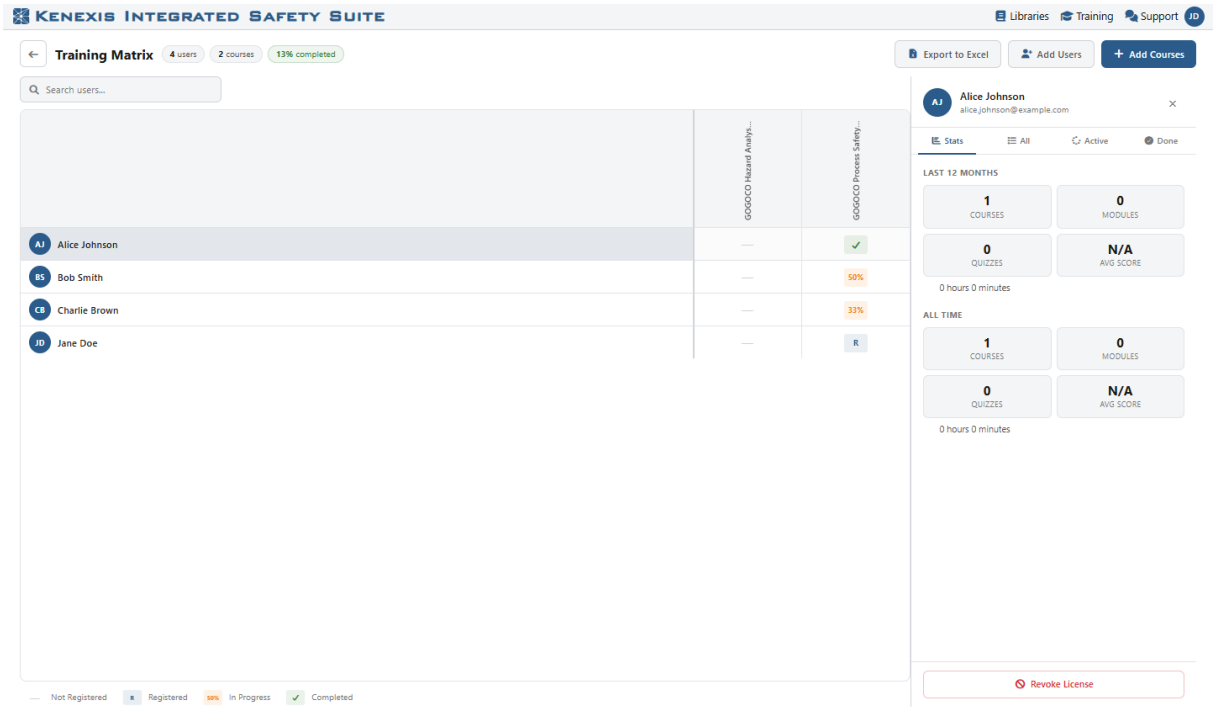



*Figure 9-4. A user's training record.*

A training license can be released from the same panel, which also ends the registrations it supported. Selecting a cell rather than a name opens that user's progress through that one course, including their score on each quiz.

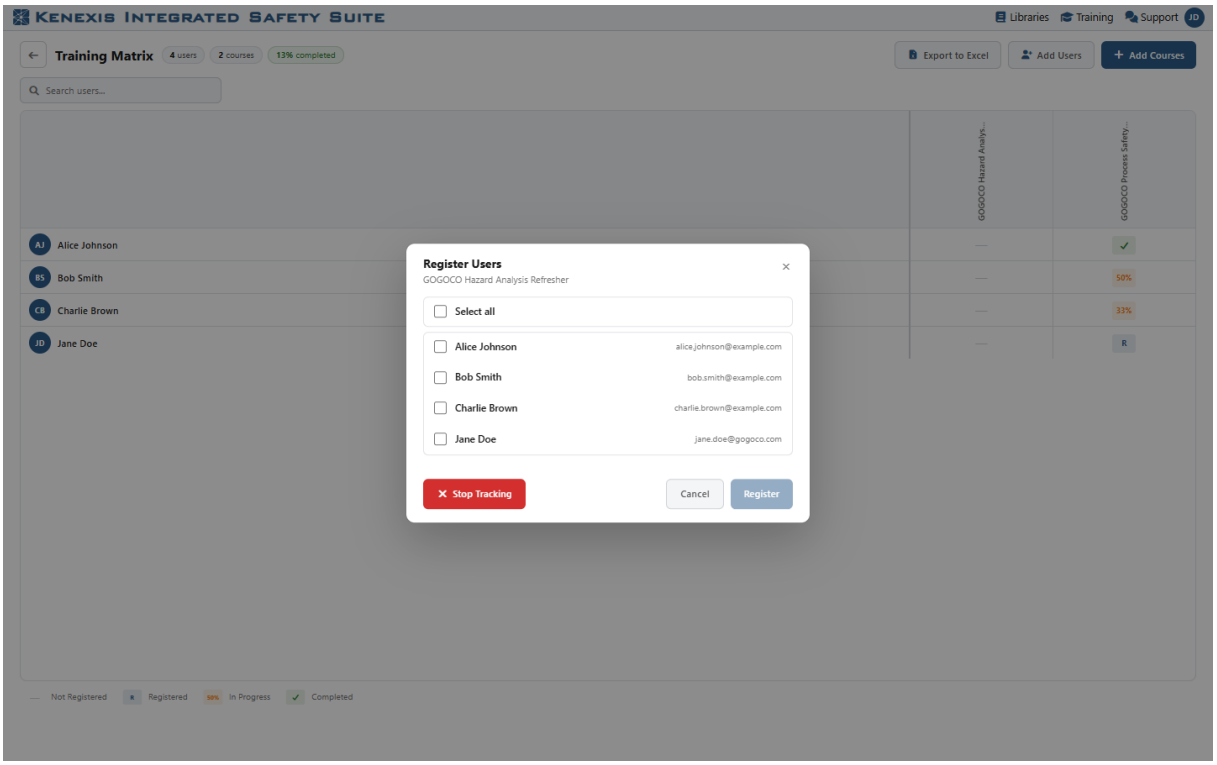



*Figure 9-5. Registering users onto a course.*

## 9.4 Exporting Training Records

Export to Excel writes the whole matrix to a spreadsheet — every tracked user against every tracked course, with their status in each. This is the form in which training records are usually presented to an auditor, and it is worth taking a copy at the same interval the organization reviews competency.

# Appendix A  Role and Permission Reference

Roles are granted per user on the Users tab (Section 8.3) and determine what kind of action an account may take anywhere in the platform.

*Table A-1. Roles.*

| Role | Grants |
|---|---|
| Editor | Changing study data. Without it, an account is read-only everywhere. |
| Organization Administrator | Security & Privacy, Users, User Groups, Licenses, Identity Providers, Recycle Bin; granting any role. |
| User Administrator | Users, User Groups, Licenses; granting Editor and Training Administrator. |
| API Administrator | API Integrations, where an API license is held. |
| Training Administrator | Course management, the Course Builder, and the Training Matrix. |

Authorizations are granted per facility or folder on the facility's properties (Section 5.5) and determine where an account may act.

*Table A-2. Facility access levels.*

| Access level | Grants |
|---|---|
| View | Opening and reading studies. |
| Edit | Reading and changing study data, subject to the facility's editor permissions. |
| Administrator | Edit, plus changing the facility's properties and authorizations. |

The two combine: an account acts only where an authorization reaches, and only in the ways its roles allow. An account without the Editor role is read-only however generous its authorizations.

# Appendix B  Study Types and Their Manuals

Study types appear in the New menu and in the Type column of the Study List under the names in the first column below. Each application has its own manual.

*Table B-1. Study types and the manuals that cover them.*

| Shown in KISS as | Application | Covers |
|---|---|---|
| Open-PHA | Kenexis Open-PHA | Process hazard analysis and layer of protection analysis. |
| Vertigo | Kenexis SIS | Safety instrumented system design and integrity verification. |
| Fault Tree | Kenexis Fault Tree | Fault tree construction, cut sets, and quantification. |
| Bowtie | Kenexis Bowtie | Barrier-based risk analysis and bowtie diagrams. |
| Fire & Gas Mapping | Kenexis Fire & Gas Mapping | Fire and gas detector coverage mapping. |
| Consequence Modeling | Kenexis Consequence Modeling | Release, dispersion, fire, and explosion modeling. |
| Open Audit | Kenexis Open-Audit | Compliance auditing and scoring. |
| MOC | Kenexis MOC | Management of change workflow and records. |

# Appendix C  Glossary

*Table C-1. Glossary of terms.*

| Term | Meaning |
|---|---|
| Authorization | A grant of access to a facility or folder, made to a user or a group at one of three levels. |
| Default library | The library a facility's studies draw reference data from. |
| Facility | The top level of the study structure, and the level at which access is granted. |
| Folder | A subdivision of a facility. Authorizations may be written against any folder. |
| Library | A store of reference data — failure rates, templates, and standard lists — that studies cite. |
| Organization | A licensed customer. Users, groups, and licenses all belong to one. |
| Recycle Bin | Where deleted facilities, folders, and studies are held for ninety days. |
| Role | A grant of capability to a user account, independent of any particular facility. |
| Share link | A link identifying a study or folder. It carries a location, not a grant of access. |
| Study | One analysis, of one type, belonging to one facility. |
| Study List | The workspace listing facilities and their contents. |
| Training license | The entitlement that admits a user to licensed courses and to the Training Matrix. |
| User group | A named set of users that can be granted access as one entity. |

*End of manual.*