



**The modern, fast and easy to use risk analysis tool**

## **Cloud Edition Getting Started Guide**

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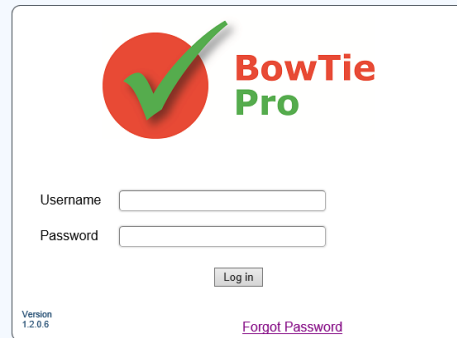
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## Quick Start Guide

### Covered in this guide

When a new user is created in the Cloud Edition an email will automatically be sent out containing a link to set the password and then access the Cloud Edition Website

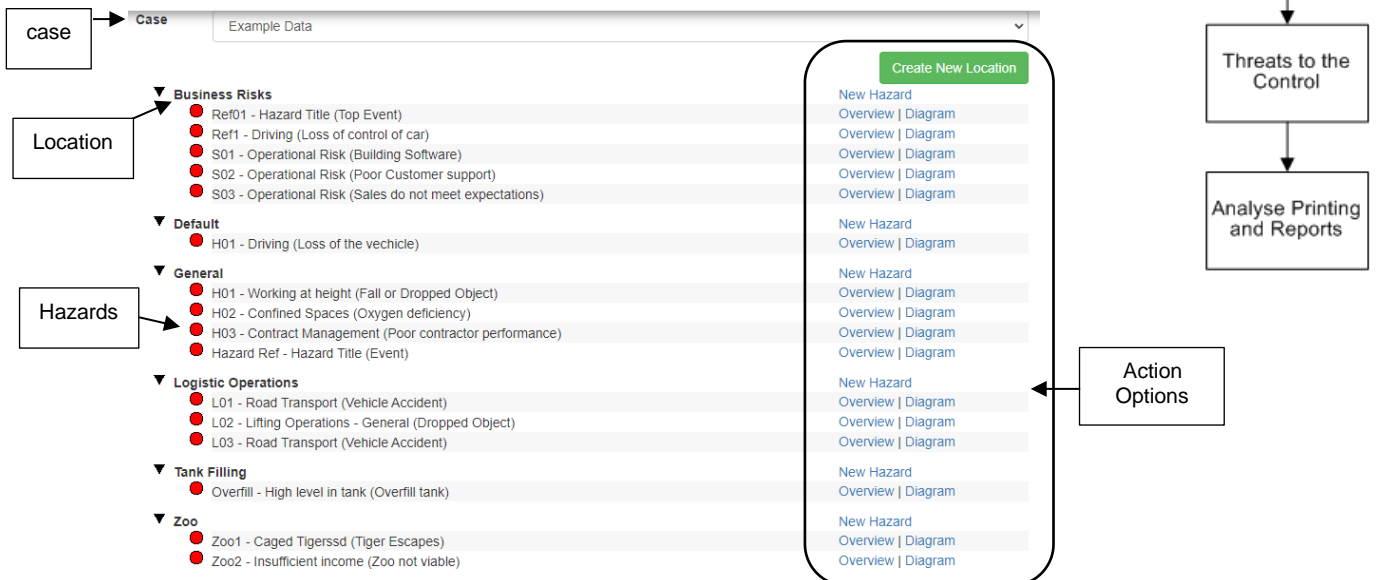


Depending on how your administrator has set up your site, the Home page will either be a list of statistics, graphs and actions that that require attention or the Hazard List (step 1). If the list of Hazard List is not displayed click on the “Hazards” button highlighted in the image on the menu at the top of the screen.



### Step 1 – Reviewing the Hazard List

At the top of this screen is the “Case” drop down showing all the Cases that you have been given access to. Below this is a list of all the Locations ▼ and Hazards ●



The screenshot shows a 'Case' dropdown menu with 'Example Data' selected. Below it, a list of hazards is displayed, grouped by location. The locations include Business Risks, Default, General, Logistic Operations, Tank Filling, and Zoo. Each location has several associated hazards, each with a red dot icon. A callout box on the right side of the screen highlights the 'Action Options' for these hazards, which include 'New Hazard', 'Overview | Diagram', and 'Diagram'.

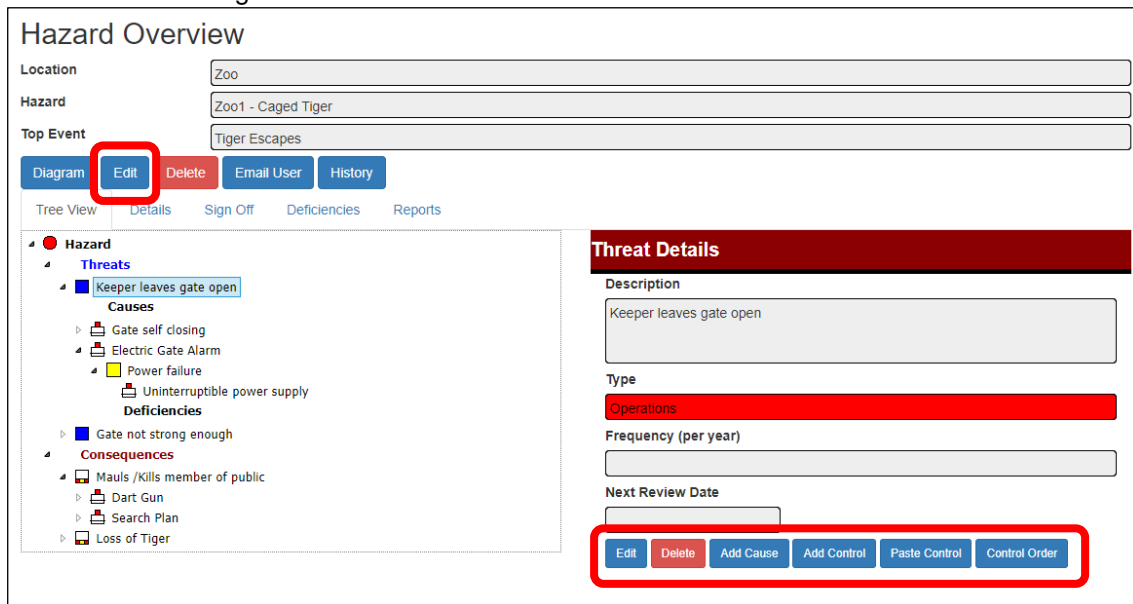
At the right hand side is a list of available options for the Locations and Hazards. The action options include:

- New Hazard
- Overview – This shows the summary for the Hazard
- Diagram – The Bowtie Diagram





If setting up a new Hazard first select the “New Hazard” button on the “Action Options” and skip to Step 4, if Editing an existing Hazard select “Overview” button on the Action Options section of the screen to go to Step 2 or “Diagram” to go to Step 3.

## Step 2 – Hazard Overview screen

This shows the summary of the Hazard. Along the top of the screen is the “Edit” button. This button can also be accessed from the Diagram screen



Below the buttons is a tree representation of the bowtie. On the left hand side is the ability to select an item. First there is a list of all the Threats and then a list of all the consequences.

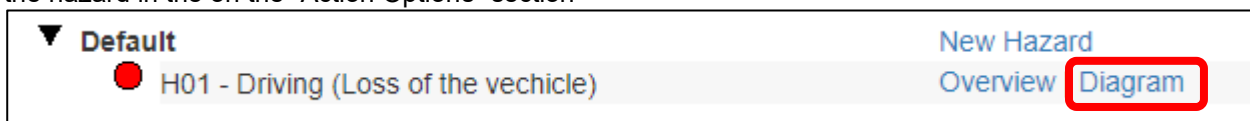
- Threat in blue with an  icon and Consequence is an  icon
  - The Barriers for the Threats with an  icon
    - The “Escalation Factors” with an  icon


When an item is selected the right-hand side shows the details and there are action available there buttons below the details (highlighted). Users can

- Add new child item
- Copy an item
- Change the sort order of child items
- Edit item
- Delete the item

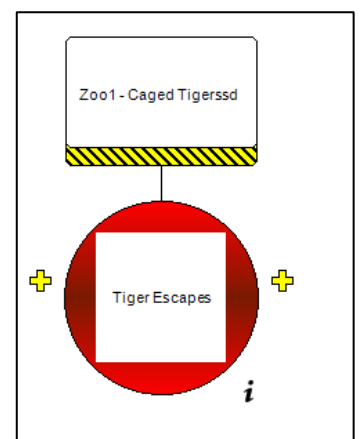
## Step 3 – Bow-tie diagrams

The bowtie diagrams are selected from Hazard List screen and clicking on the “Diagram” button to the right of the hazard in the on the “Action Options” section











The screen starts with just the Hazard being displayed. If there are Threats or Consequences defined these can be opened by pressing the  buttons to the left or right of the red circle.

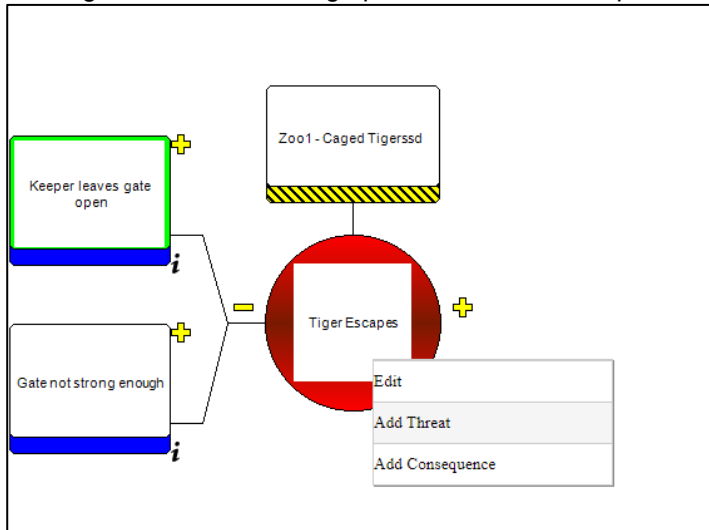
At the top of the screen is a toolbar to help navigate and change the way the diagram is displayed.



The buttons on the toolbar are

Image	Action
	Expand All
	Contract All
	Export the image to a PNG
	Show/Hide the Escalation Factors
	Show/Hide the Human Factors
	Show/Hide the Control Effectiveness at the top left of the Control
	Show/Hide the Control Codes at the top right of the Control
	Refresh the diagram

Clicking on an item will bring up actions that can be performed such as “Edit” and add child items



Further information on any object can be obtained by clicking the **i** button at the bottom right hand side of an object. Pressing this will bring up more details on the object plus have a list of action buttons such as “+ Threat” to add a new threat.

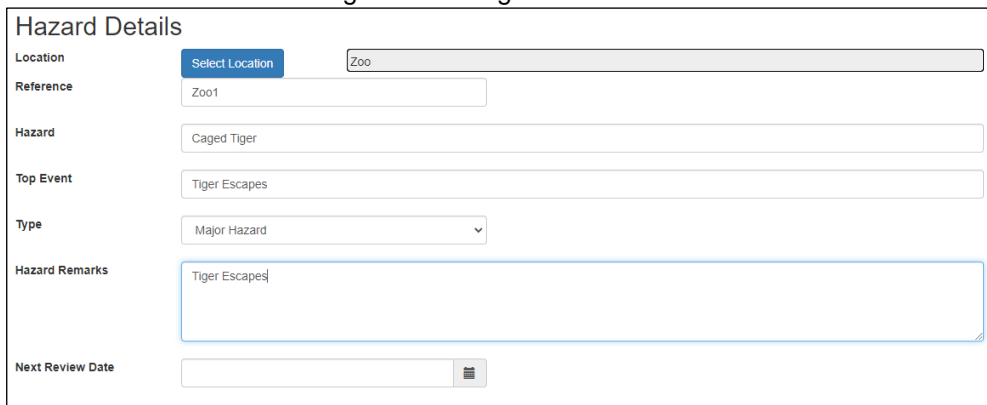
## Diagram Options

There is also a button at the top of the screen called “Diagram Options”. This allows the diagram to be customised further. The customisable diagram options include:

- Background colour
- Shadows on the boxes
- If the boxes expand to fit all the text
- If all the boxes have a unique number on them
- Font and text layout
- How each control looks
- How the threats are displayed
- How the Consequences are displayed

## Step 4 – Hazard Edit

The Hazard Edit screen is used for editing and creating Hazards



The Hazard Name, Reference and Top Event are required as a minimum.

Once the Hazard exists Threats and Consequences can be added from the Details screen

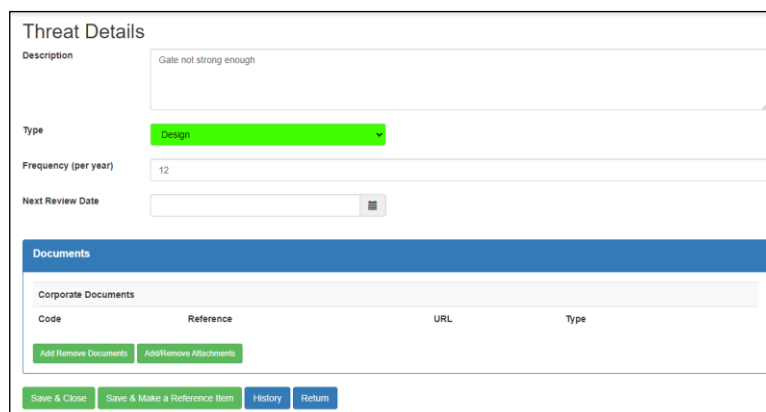
Review dates can be put on items and a reminder will automatically be sent out

- Linked documents can be added later
- Hazard categories define what type of hazard you are evaluating. Many categories can be added

## Step 5 – Threats

To view a Threat select the desired threat on the Overview screen and then click on the “Edit” button at the bottom below the details on the right hand side of the tree. To create a new Threat, click the “Threats” item on the tree and press the “Add new Threat” button.

This will display the Threat screen as shown:

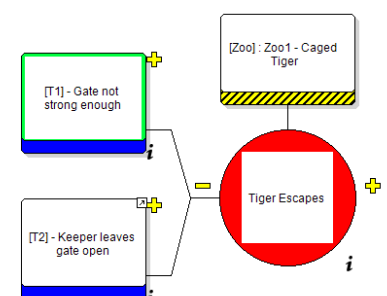


Enter a description, this is mandatory. The Type is selected from a predefined list and determines the colour assigned to the threat on the diagram.

Depending on the settings there may not be any Risk Matrix details.

Once this is done press Save.

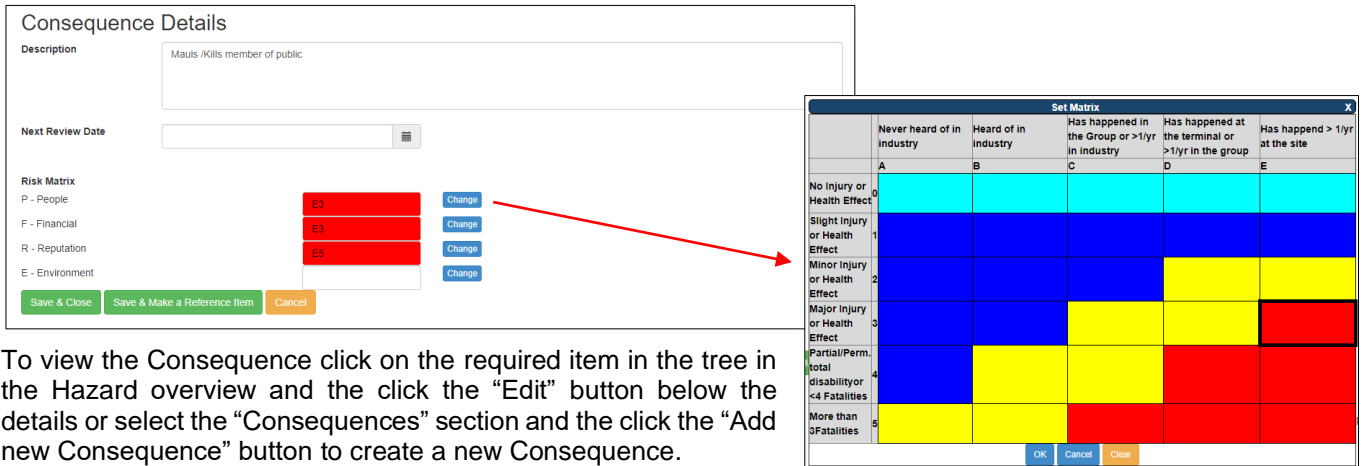
When the diagram is displayed the Threats will be shown on the left hand side and can be expanded using the plus **+** icon to the left hand side of the red hazard circle.



The option to edit the Threat from the diagram is available by clicking on the **i** button to the right of the Threat.

## Step 6 – Consequences

Consequences are edited and added in a similar way to Threats except they are on the right hand side of the hazard.



**Consequence Details**

Description: Mauls /Kills member of public

Next Review Date: [Calendar icon]

Risk Matrix:

- P - People: E3 [Change]
- F - Financial: E3 [Change]
- R - Reputation: E3 [Change]
- E - Environment: E3 [Change]

Buttons: Save & Close, Save & Make a Reference Item, Cancel

**Set Matrix**

	Never heard of in industry	Heard of in industry	Has happened in the Group or >1yr in industry	Has happened at the terminal or >1yr in the group	Has happened > 1yr at the site
	A	B	C	D	E
No Injury or Health Effect	0				
Slight Injury or Health Effect	1				
Minor Injury or Health Effect	2				
Major Injury or Health Effect	3				
Partial/Perm. total disability or <4 Fatalities	4				
More than 3 Fatalities	5				

Buttons: OK, Cancel, Clear

To view the Consequence click on the required item in the tree in the Hazard overview and then click the “Edit” button below the details or select the “Consequences” section and then click the “Add new Consequence” button to create a new Consequence.

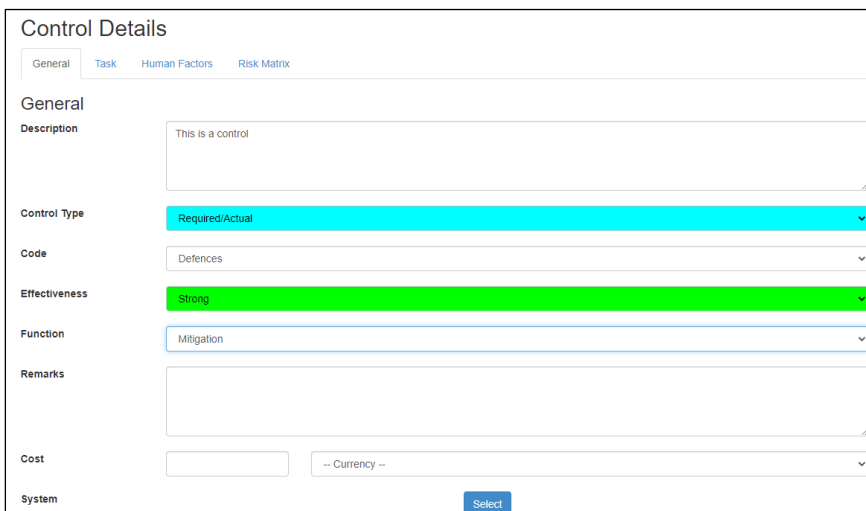
Enter a description. The risk assessment does not need to be performed at this stage.

*Note: the risk matrix can be setup by a BowTie Pro™ administrator for your company in the Admin section alternatively BowTie Pro support will be able to help.*

## Step 7 – Controls

Controls can be added to both Threats and Consequences. On the left hand side of the bowtie the Controls prevent the Threat from releasing the Top Event. On the right hand side of the bowtie the Controls stop the hazard causing the Consequence, in the event that the Top Event has been breached.

To create a Control, open up the Hazard Overview screen, select the Threat or Consequence for which a Control is required and press the “Add Control” button on the right hand side. Controls can be edited on the same screen by selecting the control in the tree and then clicking the Edit button on the right hand side



**Control Details**

General | Task | Human Factors | Risk Matrix

General

Description: This is a control

Control Type: Required/Actual

Code: Defences

Effectiveness: Strong

Function: Mitigation

Remarks:

Cost: [Field] -- Currency --

System: [Field] [Select]

- The Control Title is displayed on the diagram and is mandatory.
- The Type is selected from a predefined list and determines the colour assigned to the box above the text on the diagram
- The Code is selected from the Control codes and is displayed at the top right hand corner on the diagram.
- The Effect is the flag on the top right of the control on the diagram
- The Function, Cost and

Efficiency can be added.

- The Task determines what needs to be done to manage the Control. This is not displayed on the diagram
- The Responsible Person is displayed at the bottom of the Control in the diagram.
- Documents and verification are not displayed on the diagram. These, along with the Title and Task, are free text that can be entered.
- Target start and finish times can also be added.
- A task can be identified as “Critical” and its Criticality Level using the boxes

### Control

General | **Task** | Human Factors | Matrix

**Task**

Task:

Post:

Verification:

Target Start Date:

Target Finish Date:   Completed:

Critical:  Criticality Level:

**Documents (Select the attached items)**

Code	Reference	URL	Type
<input checked="" type="checkbox"/>	BowTieWebsite	BowTie Website	www.BowTiePro.com
<input type="checkbox"/>	CCP	Change Control Procedures	
<input type="checkbox"/>	Cranes	Rules for the Design and Safe Operation of Cranes	
<input type="checkbox"/>	D01	Documents or procedures in place to stop the threat to the control	

## Step 8 – Escalation Factors

Any issue that has the ability to cause the Control to fail is called an Escalation Factor. Adding and editing the Escalation Factors is performed on the Overview screen using the same process in the section “Escalation Factors” below each Control

### Escalation Factor

Description:

**Documents (Select the attached items)**

Code	Reference	URL	Type
<input type="checkbox"/>	BowTieWebsite	BowTie Website	www.BowTiePro.com
<input type="checkbox"/>	CCP	Change Control Procedures	
<input type="checkbox"/>	Cranes	Rules for the Design and Safe Operation of Cranes	
<input type="checkbox"/>	D01	Documents or procedures in place to stop the threat to the control	

All these actions can also be performed from the Diagram page.