



The modern, fast and easy to use risk analysis tool

Cloud Edition Getting Started Guide

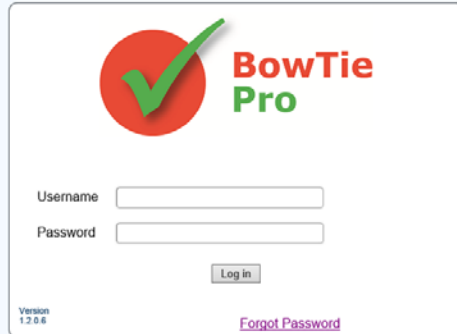
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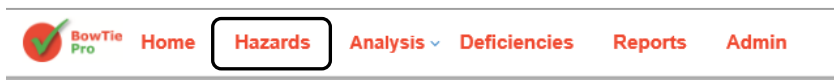
Quick Start Guide

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



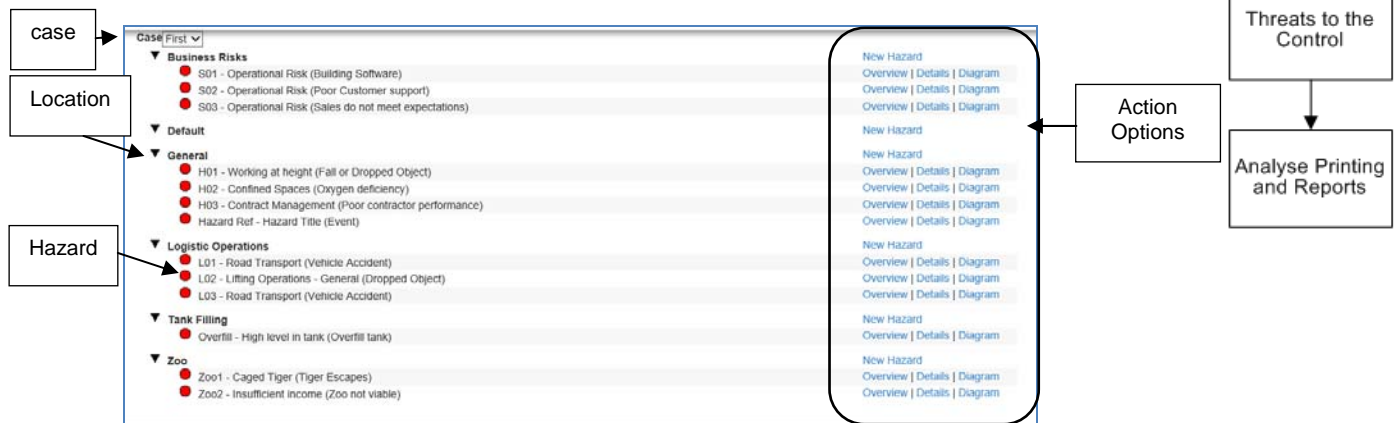
The website the Home page will display listing statistics and actions that that require attention.

At the top of the screen is the menu list. To view the list of Hazards select the “Hazards” button highlighted



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



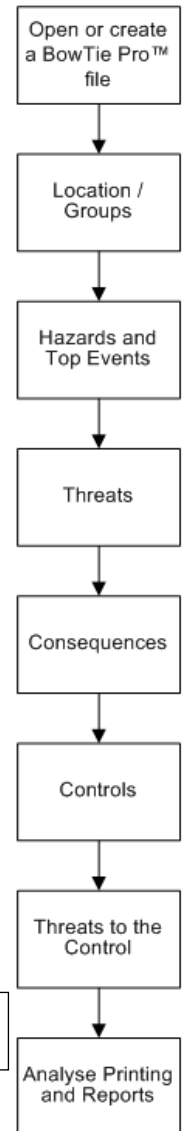
The screenshot shows a table of hazards with columns for Case, Location, and Hazard. The 'Action Options' menu is open, showing options like 'New Hazard', 'Overview', 'Details', and 'Diagram' for each hazard entry.

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
- Details – The Details of all the Hazard and all the Threats, Consequences and Barriers
- Diagram – The Bowtie Diagram

If this is a new Hazard set first select the “New Hazard” button at the top of the screen and skip to Step 3, if Editing an existing Hazard select “Details” button on the Action Options section of the screen.

Covered in this guide






Step 2 – Hazard Details screen






The screenshot shows the 'Hazard Details' screen for a hazard named 'Caged Tiger' at 'Zoo1'. The top event is 'Tiger Escapes'. Below the header are buttons for 'Overview', 'Diagram', 'Edit', and 'Expand All'. The main content is divided into two panels: 'Threats' on the left and 'Consequences' on the right. Each panel contains a hierarchical list of items with associated icons and action buttons (Add, Copy, Set Order, Edit, Delete) on the right side of each item.

On the Left hand side is a list of all the Threats in an indented structure

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

For each of these items there is an action button on the right hand side

-  Add new item
-  Copy an item
- **Set Order** Change the sort order
- **Edit** Edit item
-  Delete the item

There is a similar hierarchy on the right hand side for the Consequences.

Pressing these buttons will take the user to edit screens for Threats, Consequences and Barriers.

Step 3 – 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 Hazards exists Threats and Consequences can be added from the Details screen

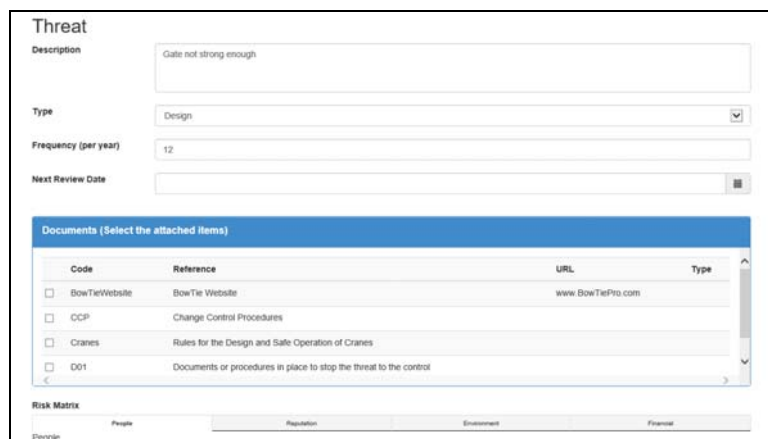
Review dates can be put on items and reminder will be automatically be sent out

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

Step 4 – Threats

To view the Threats click on the **Edit** button on the left hand side of the Threat description in the Details screen or press the **+** at the top to create a new Threat

This will display the Threat screen as shown:



Code	Reference	URL	Type
<input type="checkbox"/>	BowTieWebsite	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"/>	DD1	Documents or procedures in place to stop the threat to the control	

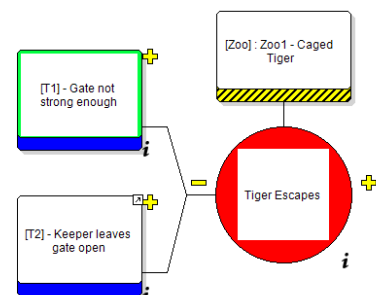
Enter a description, this is mandatory. The Type is selected from a predefined list and determines the colour assigned to the threat on the diagram.

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 5 – Consequences

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

Consequence

Description:

Next Review Date:

Risk Matrix

People	Reputation		Environment		Financial
	A	B	C	D	E
No Injury or Health Effect	0	0	0	0	0
Slight Injury or Health Effect	1	1	1	1	1
Minor Injury or Health Effect	2	2	2	2	2
Major Injury or Health Effect	3	3	3	3	3
Partial/Perm. total disability or <4 Fatalities	4	4	4	4	4
More than 3 Fatalities	5	5	5	5	5

Justification:

To view the Consequence click on the **Edit** button on the left hand side of the Consequence description in the Details screen or press the **+** at the top to create a new Consequence

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

Note: the risk matrix will be setup by the BowTie Pro™ administrator. Please contact BowTie Pro support if help is required.

Step 5 – 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 details screen, select the Threat or Consequence for which a Control is required and press the **+** next to the word “Controls”. Controls can be edited on the same screen by clicking the **Edit** on the right hand side of the item.

Control

General | Task | Human Factors

General

Control Title:

Control Type:

Code:

Effectiveness:

Function:

Cost: -- Currency --

System: **Select**

Additional Systems (Select the attached items)

- 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 7 – Escalation Factors

Any issue that has the ability to cause the Control to fail are called Escalation Factor. Adding and Editing the Escalation factors is performed on the Details screen using the same process in the section "Escalation Factors" below each Control

Escalation Factor

Description:

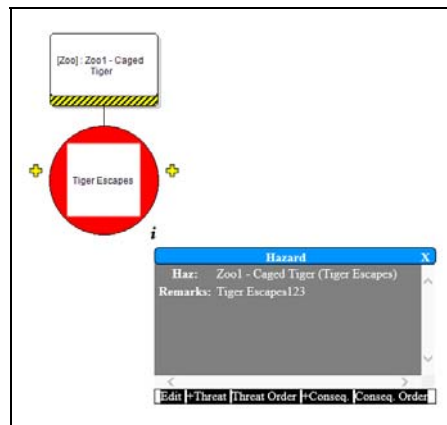
Documents (Select the attached items)

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	

Save & Close Cancel

All these actions can also be created or edited on the Diagram page.

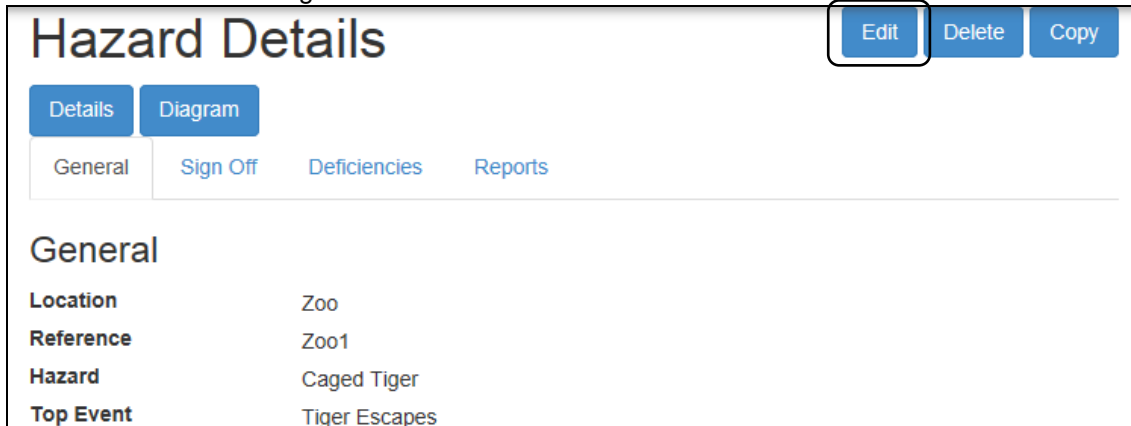
When the diagram is activated



The screen starts with just the Hazard being displayed. The Threats or Consequences can be opened by pressing the + button. There is an information button *i* at the bottom right hand side of all objects. 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. The Assessment also allows Risk Matrix which can be applied to the Consequences, Hazards, Threats and

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 Details and Diagram screens



Step 8 – Bow-tie diagrams

The diagram can be customised. 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

