

# Deltek Acumen 5.1

RiskBook

**June 30, 2014**

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## Using RiskBook for Risk Register Collaboration

When you create risk events in Acumen, you may want others to review them and to provide input about the risk levels and impacts. You now have the option to publish your risk register and risk scoring matrix to RiskBook; an Acumen Add-on that uses Kona's cloud-based social collaboration and productivity features.

When you publish a risk register to RiskBook, Kona creates a space for that risk register. A new space is created for each risk register that you publish to RiskBook. All the risks that were in the risk register are published to the Kona space and can be viewed on the Risks tab. You can click on a risk and see a complete risk breakdown, including the values that the risk register owner entered for probability, as well as schedule and cost impacts.

As the owner of the Kona space, you can invite people to the space to add comments and to share their opinions about the risks. For example, you may have listed a very high risk probability whereas others may feel the probability is a medium risk.

In addition, you can use the other Kona tabs, such as the Conversations and Tasks tabs, to discuss the risks and to add tasks for others to complete. For example, you may add a task requiring each person in the space to add their own scores to the risk items.

As with other Kona spaces, you have the option to set up space templates. For example, you may want to create a template that includes standard tasks relating to risk register. When you publish to RiskBook, you can select the template which Kona then uses when creating the space.

After everyone has provided feedback, you can export the risk register to an XML file format which can then be imported back into Acumen. You can then compare your original risk register with the collaborative version and make any needed adjustments.



The Acumen RiskBook license includes a Kona Business Account.

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## Software Requirements

In order to use RiskBook, you will need a RiskBook license and one of the following browsers:

- Internet Explorer 9 or higher
- Google Chrome version 12 or higher
- Safari 6.0 or higher
- Firefox 9 or higher

## The Kona Business Token

The Kona Business Token includes three fields (**Redirect URL**, **Client ID**, and **Client Secret**) and is used to link Acumen to Kona. You will need this information if you need to manually enable RiskBook in Acumen (see next topic).



You must be a Kona Business Account Administrator in order to obtain the Kona Business Token.

### To obtain the Kona Business Token, complete the following steps:

1. From Kona, click **Accounts** in the left sidebar.
2. Click the Account name.
3. Click **Edit Account** in the upper right portion of the screen.
4. Click the Integrations tab.
5. If Acumen is listed, skip to step 8, otherwise continue with step 6.
6. Click **Add applications** and complete the fields:
  - **Application Name** — Enter **Acumen**.
  - **Redirect URL** — Enter **https://www.deltek.com**.
7. Click **Done**.

The Acumen **Client ID**, **Client Secret**, and **Redirect URL** are listed on the tab.

8. Copy and paste each field entry into the corresponding field in Acumen (**File » Deltek Acumen Options » Platforms tab**), or email the information to another user.

## Enable RiskBook in Acumen

When you purchase a RiskBook license, Acumen should automatically be set up to publish a risk register to RiskBook. If the **Publish Risk Register to RiskBook** icon on the S3 // Risk tab is grayed out, you may need to manually enable RiskBook.

**To manually enable RiskBook, complete the following steps:**

1. In Acumen, click  **File » Deltek Acumen Options**.
2. On the Platforms tab, in the **Kona by Deltek** group, complete the following fields (this set of fields is known as the Kona Business Token):
  - **Redirect URL**
  - **Client ID**
  - **Client Secret**



If you do not know the Kona Business token information that needs to be entered, please contact your Kona Business Administrator or Kona Support ([support@kona.com](mailto:support@kona.com)), or you can log a case at: <http://support.kona.com/tickets/new>.

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3. Click **OK** to save the information and close the dialog box.

# Publish a Risk Register to RiskBook



In order to publish a risk register to RiskBook, you need to be a member of the Kona Business Account.

If you do not have a Kona account, contact your administrator, or Kona Support at [support@kona.com](mailto:support@kona.com), to request that they add you to the Kona Business Account. An email will then be sent to you with details about setting up your account.

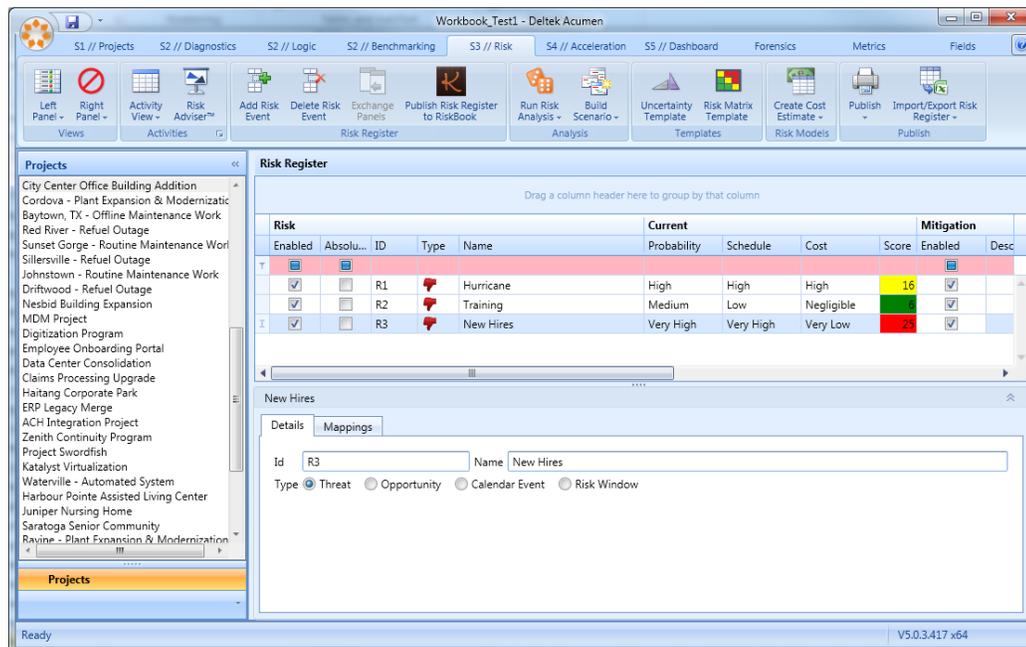
## To publish a risk register to RiskBook, complete the following steps:

1. On the S3 // Risk tab, use the risk register to create your risk events.

If you enter an email in the risk register Owner Email column, and the user is a member of your Kona Business account, then when the risk register is published to RiskBook, the user will get an email inviting them to the space.



See *Risk Register* in the Acumen User Guide for more information.



2. Click **Risk Register » Publish Risk Register to RiskBook**.



If this option is grayed out, see [Enable RiskBook](#) for more information.

3. Do one of the following:
  - a. If you have set up a RiskBook space before, skip to step 4.



If you have changed your password, you will need to re-authenticate by following the directions in **Step 3b** below.

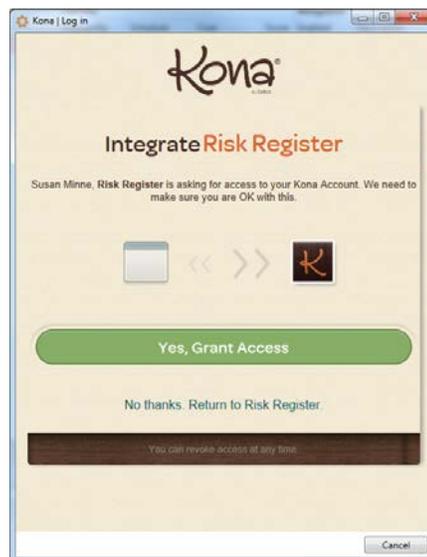
- b. If this is your first time setting up a RiskBook space, or if you have changed your password:
  - i. On the Kona Log In screen, enter your Kona login details.



If you are a Kona Business Account administrator logging into your account for the first time, click the question mark icon to display the reset password screen where you can set up your own password.



- ii. Click **Log In**.
- iii. On the Kona Integrate Risk Register screen, click **Yes, Grant Access** to allow Risk Register to access your Kona account.



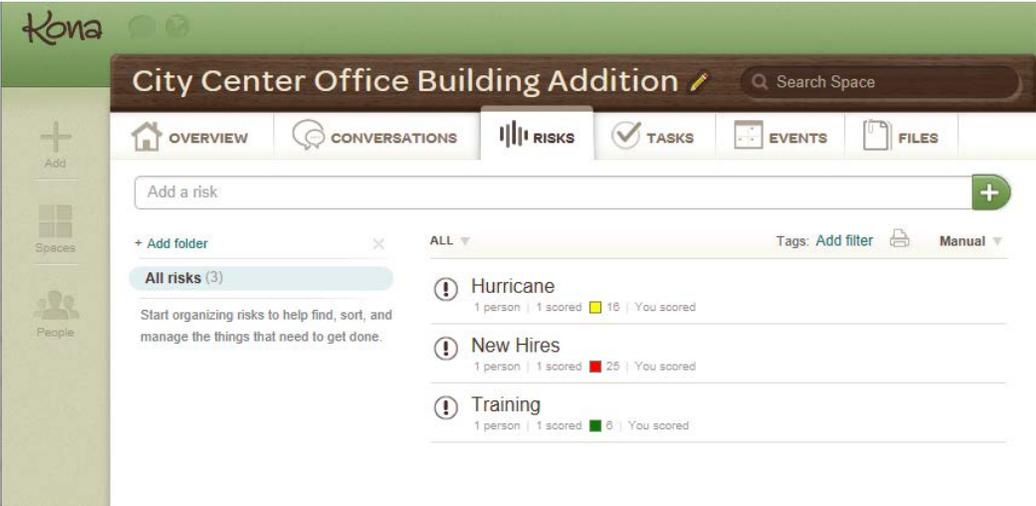
You only need to perform this login step the first time you access RiskBook or if you change your password. Acumen retains your Kona login information so that, when you create another RiskBook space, you won't need to enter your login details or grant access to Kona again.

- On the Create an Acumen RiskBook Register screen, complete the fields.

- **Space Name** — The name of your RiskBook space.
  - **Description** — A description of the space.
  - **Overview** — Use this field to describe the purpose for the space.
  - **Account** — If you have more than one Kona account, select the account that Kona should use when creating the space.
  - **Optional Template** — If you have set up Kona templates, use this field to select a template to apply to the space. If this field is blank, then no template is applied.
- Click **OK**.
  - Kona opens a browser window or a browser tab (depending on your browser settings) and creates the space.



7. The Risks tab lists all the risks from the published risk register.



# Using RiskBook

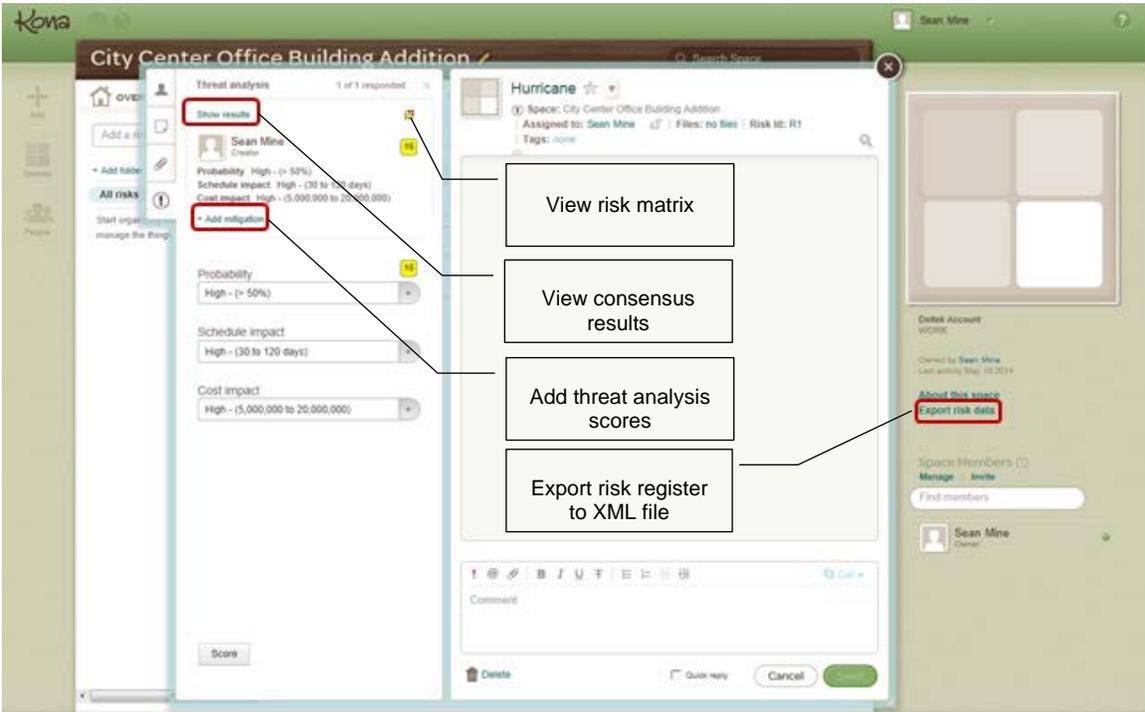
After you create the RiskBook space, you can invite people to the space to start conversations and get input on the risk register.

Open a risk to:

- View details about the risk register owner’s threat analysis score.
- View or add comments.
- View consensus results, including a breakdown for each category.
- Add your own threat analysis scores.
- View the risk matrix that the risk register owner set up.



## Example of a RiskBook Risk



## Export Risk Register from RiskBook

After everyone has provided feedback, you can export the risk register to an XML file which can then be imported back into Acumen.

**To export the risk register from RiskBook, complete the following steps:**

1. In RiskBook, click **Export risk data**.



You must be in a specific space to export. You cannot export from My Kona as that is a cross space/project area.

The export may take several minutes to complete. When complete, the number on your Kona notifications icon will increase by 1.

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The exported risk register is attached to the RiskBook space as a spreadsheet file. The file name is the same as the risk register Kona space name.

2. Use the Files tab to open or download the file.

## Import Risk Register Back Into Acumen

To import the risk register back into Acumen, use the Microsoft Excel import function in the Get External Data From group on the S1 // Projects tab.

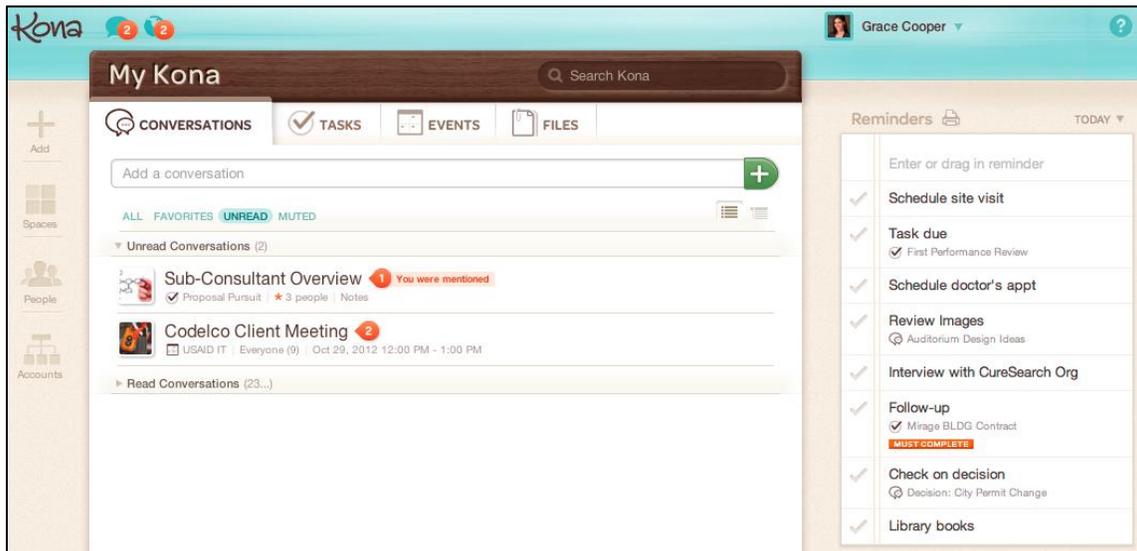
# Appendix A: Kona Business for the Administrator

## Getting Started

My Kona is your personal view in Kona. It includes your:

- Conversations
- Tasks
- Events
- Reminder pad

You can get back to this view anytime by clicking on the Kona logo in the top left hand corner.



Kona Area	Description
 Spaces (29) <a href="#">Manage</a>   <a href="#">Add</a>   <a href="#">Join</a> <input type="text" value="Find spaces"/>	<p><b>Spaces</b> lists all the spaces for which you are a member.</p> <p>A space is a private place where a group of people, with a common purpose or goal, can collaborate.</p>
 People (36) <a href="#">Manage</a>	<p><b>People</b> lists all the people with whom you are connected through Kona, both inside and outside your organization.</p> <p>To display certain people at the top of the list, click <b>Manage</b> then click the <b>Favorite</b> star next to their name. You can “favorite” up to 15 people.</p>
 Accounts (1)	<p>The Kona Business Administrator uses <b>Accounts</b> to manage account users and client applications (integrations with Kona), and view usage reports.</p>

## Managing Accounts

The screenshot shows the 'Account Overview' for 'Kona Dot Com'. It features a profile picture of a red 'K' on a dark background. The account name is 'Kona Dot Com' with the URL 'kona.com' and the tagline 'It's Kona!'. A green 'Edit Account' button is in the top right. Below the profile picture, it says 'Make it recognizable for those in your organization.' with a plus icon. The account type is 'Partner' with '1000 members'. The file storage limit is '20 GB' with a progress bar showing '0% used'. A 'Boost Productivity!' section encourages adding members and managing client applications. Three summary cards show: 13 members (with 'Add members' and '2 space publishers'), 2 administrators (with 'Add administrators'), and 25 spaces (with 'Add a space'). A 'Get account reports' link is at the bottom right.

Accounts Area	Description
Members	These are the people you have added to your Kona Business account.
Administrators	These are members who can add or remove people from your Kona Business account. In addition, they can see the names of all spaces; however, they can only see space details (for example, conversations) where they are included as a space member and have permissions to those space objects.
Spaces	These are all the spaces that have been created within your Kona Business Account.
Space Publishers	These are members who have been given the ability to create space templates.
Get account reports	These are usage reports that provide some visibility into which members and spaces are most active and who is most leveraging your Kona Business subscription.

## The “Getting Started with Kona Business” Space

This space is created for your initial Kona Business Admin and is designed to help you get started with your Kona Business subscription.



The Tasks tab includes the following information:

- **Collateral to Share** — This section includes a link to the Kona Business video, Kona overview slide deck, Common questions and more.
- **Best Practices** — This section includes to-do’s such as subscribing to the business edition updates, tips on getting your first space going, and how to lead through this transition.
- **Kona Admin Checklist** — This section outlines everything you need to get your organization up and running in Kona.

### Include Others in this Space

Click **Invite** under Space Members in the right margin area of the space to add others involved in your Kona Business roll-out to this space.



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