



## SimpleRisk Customization Extra - Configuration and Functionality Guide

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### Introduction

This guide will cover the configuration and installation of the Customization Extra, as well as provide an overview of its features and capabilities. This guide assumes you currently have:

- A SimpleRisk On-Prem or Hosted instance already running and
- The Customization Extra has been purchased, installed, and has been activated.

If you have not already installed the Customization Extra, but have purchased a subscription, a brief overview of how to download and install it follows.

Please note if you are a SimpleRisk hosted customer and have a subscription to the Hosted Large Enterprise plan that contains the Customization feature, please ignore steps #1 through #3, and simply follow the instructions from step #4 through step #6 to activate.

### Installing and Activating the Customization Extra

To install and activate this Extra, please follow these steps:

- 1) Login to SimpleRisk
- 2) Find and click “Configure” (at the top), then select “Register & Upgrade” on the left.
- 3) Find the Customization Extra at the bottom, in the list of “Extras.” On the right hand side you should see a button displaying “Install.” If not, that indicates your instance is either not registered, or a subscription has not yet been purchased, both of which are required in order to download and activate the Extra. (For help with registering see: <https://simplerisk.freshdesk.com/support/solutions/articles/6000185191-how-to-register-your-simplerisk-instance>)
- 4) Once the Extra has been installed, from the “Configure” menu on the left, find and click on the “Extras” button.
- 5) Find the row on this page for the “Customization Extra” and you should see a “No” in the same row, assuming it was successfully installed. Click the “No.”
- 6) You will then automatically be presented with the “Activate” button – simply click that button to complete the process.

### Configuring Customization Extra

This section will cover how to add new fields using the Customization Extra. To begin, navigate to the Customization Extra configuration page. First click “Configure” at the top, followed by “Extras” on the left. Now select the “Yes” button adjacent to the “Customization Extra.” On this page, you will see a few sections devoted to creating new fields in your instance. Below there will be details on how to add a new field, with step-by-step instructions.



First at the very top you will see a dropdown to select if you are managing fields for Assets or Risks. Once you have made your selection you may move on to creating your new fields below.

A screenshot of a web form titled "Add a Custom Field". The form has a light gray background and a thin black border. It contains two input fields: "Field Name:" with an empty text box, and "Field Type:" with a dropdown menu showing "dropdown" and a downward arrow. Below these fields is a dark gray button with the word "Add" in white text.

- 1) Enter a name for your new field in the “Add a Custom Field” section.
- 2) Now select a field type. Currently, there are four types of field options available.
  - Dropdown – This allows you to create a new dropdown menu, along with your custom entries to populate the menu. Only one item may be selected when using this field type.
  - Multi-dropdown – This will allow you to create a dropdown that allows users to select any number of entries. Again you will create the entries that can be selected from this dropdown.
  - Short Text – This will allow you to create a small text box field for open ended, free form entries and for the purposes of appearance, is ideal for entries that will only contain a few words.
  - Long Text – This field type works the same as the small text field and for the purposes of appearance, is designed for lengthier free form entries.
- 3) Your final step for creating a new field will be to click the “Add” button.

**Custom Fields**

Field Name:

Field Sample:

Delete

Delete

Add

For both dropdowns and multi-dropdowns, you will now want to define some values for them. To define values, navigate to the second section on the page labeled “Custom Fields.” Here, you will select the custom field you wish to add/remove values from in the dropdown labeled “Field Name.” You will now be presented with two new additions to the page, one of which is labeled “Field Sample,” and a second one that is a blank field for adding a new option.

To add a new option, type your value into the blank field and click the “Add” button to the right of the field. This will add your new option to the dropdown menu and can be repeated as many times as necessary. You may also delete entries by selecting them in the dropdown labeled “Field Sample” and then clicking the “Delete” button found to the right. This is also where you can delete a custom field altogether by selecting it in the “Field Name” dropdown and then clicking the “Delete” button, which is displayed next to the “Field Name” dropdown.

Please note that deleting fields does not delete any data associated with a field name and that any data linked to a deleted field will be stored in the SimpleRisk database and is recoverable. Deleting a field name only eliminates the field name from being available to select as an option via the SimpleRisk UI. Should you elect to create a new field using the same name as a previously deleted field, it will not restore this association. However, there is a way to retrieve this data from the database and we recommend contacting [support@simplerisk.com](mailto:support@simplerisk.com) should you need guidance on how this can be accomplished.

## Template

Main Field:



















Add Main Field

Custom Field:

Example

Add Custom Field

Details Mitigation Review

Submission Date		Submitted By	
Category		Risk Source	
Site/Location		Risk Scoring Method	
External Reference ID		Risk Assessment	
Control Regulation		Additional Notes	
Control Number		Supporting Documentation	
Affected Assets			
Technology			
Team			
Additional Stakeholders			
Owner			
Owner's Manager			

Restore

Save

Now we will explain how to add a new field to a page in SimpleRisk. Currently the Customization Extra supports adding fields to Risks, Mitigations, and Review pages in SimpleRisk. This same functionality will be extended to additional SimpleRisk modules in future releases. Adding a field to a page in SimpleRisk is quite easy and the steps are listed below.

1) In the “Template” section below “Main Field,” select the page to which you would like to add a custom field. The current options are “Details,” “Mitigation,” and “Review.”



- 2) Now select the field you are going to add in the “Custom Field” dropdown.
- 3) Click “Add Custom Field” to add the field to the page.
- 4) Click “Save” at the bottom right of the page. Note that you must click “Save” or the new custom field will not appear on the page.

You are also able to rearrange the order in which fields are displayed, including all SimpleRisk default fields that are stock, by dragging and dropping them to the location of your choice. Clicking the “Trashcan” icon found adjacent to any field will allow you remove that field from the page. You may also remove any stock SimpleRisk fields not in use by performing this same action. (**Note:** This action does not delete the field name from the system or any data associated with that field name and will only prevent the field from being displayed.)

If you ever need to add a stock SimpleRisk field back into SimpleRisk that was previously deleted, you simply need to select the field name in the “Main Field” dropdown and click “Add Main Field.” A reminder not to forget to click “Save” at the bottom right, to ensure the field is added back to the page.

## Summary

This guide has covered the configuration, installation, and management of the Customization Extra. If you still have questions or something is not functioning as expected, please contact us at: [support@simplerisk.com](mailto:support@simplerisk.com)