

Boston College Business Continuity Planning Application User Guide

Welcome to the Boston College Business Continuity Planning Application! These instructions are intended to assist Business Continuity Planners with using and navigating the application by providing quick instructions and tips.

If you need any assistance or have any questions; please contact:

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LOGGING IN:

1. To access the online planning application, enter: www.bc.edu/continuity in your internet browser (Internet Explorer, Firefox, Safari, Google Chrome, etc).
2. Please check the Business Continuity Announcements box on the login page for information regarding updates or changes to the application and any issues being addressed.
3. Log onto the application using your normal BC user name & password. This will bring you to the Opening Page of the application.
4. Click the arrow to the right of plan window to open a drop down menu. Find the plan you wish to work on, and click "Go to the Plan."



Note: If at any time you experience issues with the application, click on the "Report a Problem" link in the top right corner of the screen. A pop-up box will open with space to describe the problem. Please make sure to include your name, department, and phone number where you can be reached, and click "Submit." Staff will get back in touch with you to resolve reported issues.


NAVIGATION/GUIDANCE:

There are two (2) ways to navigate through the application; use the dropdown box at the top of each worksheet to choose the desired screen or click the red "Next Worksheet" button to proceed through the worksheets in chronological order. We recommend completing the worksheets in order the first time the plan is entered since some worksheets use information entered into previous pages.

Names are sensitive to spelling accuracy to find in the system; for internal contacts, click on the arrow to the right of the box to search the directory and choose the desired name. On a contact list, if a name is not yet available in the directory, add the other fields, such as phone number, department, title, etc. for the person and list their name in the "Comments" section until they are added to the directory. The directory is updated automatically every week and new employees will be added on that schedule.

SPECIFIC WORKSHEETS/PAGES:

All worksheets in the system provide instructions and / or guidance near the top of the page. Many pages also provide examples, followed by existing data and finally fields to fill in your information.

General Instructions: Scroll to the bottom of the page, input information into the Form fields, and click "Save". You will see the newly created record in the report. To delete a row, click  box on left side of page. Click "Delete" and then move to next Worksheet.

Instructions and Scope

This page provides a general description of the department and of the uses of the plan, any special considerations and overall recovery strategy. Fill in your information then hit "Save". After you add or delete info, Click "Apply Changes". *Note:* Dept. Continuity Planner's name needs to be added in order to go to next sheet. The Google Drive link is the address where your department Business Continuity Plan and associated files should be stored electronically. For more information on the Business Continuity Folder in Google Drive, see the Google Drive Instructions section at the bottom of page 3 of this guide.

Worksheet #1 – Critical Functions and Recovery Time Objectives (RTO)

List the most critical functions the department relies on to operate, and what the impacts would be if these functions are not restored. See example for type of information collected on this worksheet.

Worksheet#2 – Software Applications Supporting Critical Functions

Use the arrow to the right of the Critical Function box to choose one of the functions from Worksheet #1. Match the software application with the critical function it pertains to; fill in as many of the fields and as much information as possible, and then click "Save". Each application should have a contact name. If the contact is internal, click on the arrow to the right of the box to search the directory and choose the desired name (the application will not recognize a name that has been manually added to this box). If the contact is external, use the indicated box for external support. See example for type of information collected on this worksheet. Critical functions can have more than one software application supporting it and a software application can support more than one critical function. Make an individual entry for each application supporting each critical function.

Worksheet #3 – Vital Records, Forms and Documents

List vital records, forms and documents needed by the department. Refer to the example for type of information included on this worksheet. The comment space is useful for adding additional information that may not fit into the form provided.

Worksheet #4 - Orders of Succession

List the names of the department head and other senior positions and their titles. Then choose who would serve as successor to those individuals if they were unexpectedly unavailable. The same successors may be named for different essential personnel, but avoid designating the same position or person as the first successor to several essential personnel. Be sure to include at least the title of the position and the title for the alternate if there is not a specific individual. You can also list successors for the Departmental Continuity Planning Team key positions on this page.

Worksheet # 5 – Office Support Equipment

This page requires the amount to be added in each field in order to move to next page. Enter "0" if dept does not have an item. Any specialized items should be listed on the next Worksheet #6. These are items needed to replace or setup at a different office location to support a *minimal* workforce if primary work locations were damaged or unavailable.

Worksheet #6 – Special Equipment and Supplies

List any special or unique equipment or supplies, such as: specialized computer hardware, supplies specific to your department and items that are not normally found in most departments on campus. Include where the item is normally located and the contact information for the vendor who could service or replace the item.

Worksheet #7 – Emergency & Alternate Operating Facilities

Enter information for each facility to support your department. If none exists, input NONE and 0 People Expected. The Emergency Meeting Site is where staff meets outside due to evacuation of building; this location can be found in the building's Emergency Evacuation Plan. The Department Operational Center is where the Business Continuity Team and leadership meet to discuss emergency issues. Alternate Work Locations are sites where you would relocate your workforce to for a period of time in the event your building(s) were not accessible.

Worksheet #8 - Modes of Notification & Communication

Note the priority of use (1 being the most likely and highest) for staff and customers/constituents. Describe what equipment you need in order to use the system and who has access to the system. Keep track of how often you test your communication system. Multiple modes of communication should be listed in the event one is unavailable.

Worksheet #9 – Management & Continuity Team Contacts

This page includes key individuals who need to be contacted in the event of an emergency/business disruption. This should include the Department Business Continuity Planner, members of the Department Continuity Planning Team and key department management. It is essential for this worksheet to be filled out in its entirety for these contacts.

Worksheet #10 – Departmental Staff Contacts

This page contains a list of all department staff. Please note that "S" indicates key staff for notification within the department. A (*) will appear on the report next to their name. If you already have a staff contact list in another format/file, make one entry and indicate in the comments field that the list exists under separate cover and where it is filed. (NOTE: Be sure to place electronic copies of these other files in the Business Continuity Google Drive folder).

Worksheet #11 – Essential Personnel & Cross-Training

The critical functions on this worksheet correspond to Worksheet # 1 and are available to choose from in the popup box. When filling out this worksheet, consider upwards of a 40% absenteeism rate and strive to have three to five persons who can perform essential functions if needed. In the event three to five persons cannot perform the critical function, identify personnel/positions that could easily be cross-trained to perform the function.

Worksheet #12 - Key Vendors & Other External Contacts

Outside vendors and other important external contacts who are critical to your department are listed here. Try to list a vendor and 24-hour emergency number for each external service or application listed on Worksheets 2, 3, & 6.

Worksheet #13 – Emergency Checklist

This checklist can be used to walk you through key steps during a crisis. Click 'Setup Default Task' to create the initial list. You can use the default list or modify for your department's needs. The information provided gives you a base to add or delete the information that is relevant to your department. To add, click in the area you want to add and press 'Add Task'. To delete an area, check the box to the left and press delete task.

Other Information or Special Instructions

This area can be used to list instructions that would be more specific and detailed with regard to procedures, computer access, building setup, etc. This worksheet is optional and a "catch all" for data not captured elsewhere in your plan.

Mitigation and Improvements – Action Items

This page is designed to capture "to do" items for departments relative to mitigation steps to prevent future impacts. These are not necessarily items that will be resolved right away, but allows for a list to be created for future action. There is also the option to match the mitigation item with the critical function it pertains to on this page.

Plan Maintenance and Distribution

Ensure that the updated plan is distributed to Department Continuity Team members, the Business Continuity Planner, department management, the Office of Emergency Management, and also placed in the on-line Business Continuity Folder on Google Drive. A copy of the Plan should also be sent to an off-site storage location. List all holders and locations of the plan on this worksheet.

Review and Approvals

The Dept. Continuity Planner can use this page to keep track of the review and approval process. Once the plan is complete, the Dept. Continuity Planner should send it first to the Office of Emergency Management for review and comments, then to the department head for review and approval, and finally to the appropriate Executive for sign off. Also be sure to enter the plan revision number and revision date which will be displayed on the cover of the final formatted plan.

Checklist

To help with the plan review process, use this checklist of sections that have been completed or are in the process and the date the plan was last reviewed to keep track of progress. The plan should not be sent to the Office of Emergency Management for review and comments until all the relevant worksheets are "Complete." If a worksheet is not relevant to the department, the status should be "NA."

Business Continuity Plan Report


This page allows you to see the complete plan at a glance, check areas that need changes/updates and review what is still in process or are completed. You can also produce a PDF report of your plan by clicking on the Create PDF button at the top. This will automatically generate a fully formatted PDF version of your plan that can then be saved, printed and/or shared with others.

DON'T FORGET:


Be sure to provide hardcopies of your Department Business Continuity Plan to key staff in your department, keep copies of the plan at your office and home and place an electronic copy of your plan in the Business Continuity Plan folder in Google Drive. Finally, keep your plan updated and current.

GOOGLE DRIVE INSTRUCTIONS

A copy of the department's Business Continuity Plan, and other pertinent Business Continuity documents, should be stored in the Business Continuity folder on Google Drive. This folder is protected with an additional level of encryption called Cloud Lock to protect the information contained in the plan and supplemental documents stored in the folder. This folder is managed by the

Office of Emergency Management, which grants access and share permissions for the department folder to the department's Business Continuity Planner. If you do not know the link to the Goggle Drive folder, contact the Office of Emergency Management and we will provide it to you. Once the folder is shared with you can access it through the "Shared with me" section on Google Drive. For easier access, click on the folder name and choose the  symbol in the top right to "Add to My Drive."

To upload your plan, click the "New" button, then "File upload" to browse your desktop for the plan. Remember to include in the folder any other documents relevant to or mentioned in the plan, such as department contact lists.

The Departmental Business Continuity Planner can then share the folder and its contents with key staff in their department by clicking on the file or folder name and clicking the  symbol in the top right. A box will open where the people the file or folder should be shared with can be added as well as whether they should have "edit" or "view only" rights.

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Thank you for all your efforts to keep Boston College safe and prepared!!!