Business Continuity Management Module

Baseline Configuration Guide

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Contents

About Rsam Baseline Configuration Guides

Rsam Baseline Configuration Guides provide you the information needed to understand the pre-defined configurations for each module. These guides should be referenced to gain a better understanding of how the module is configured and can be used out-of-the-box.

Baseline Configuration Overview

This document describes the baseline configuration and structure for the Rsam Business Continuity Management (BCM) module. The baseline configurations for the BCM module allow users to automate the entire lifecycle of planning, testing, and reporting on BCM activities. This allows you to seamlessly integrate Business Impact Analysis (BIA), test disaster recovery and crisis management plans, identify gaps, remediate issues, and report the state of your business-critical assets. The pre-configured activities help streamline your operations by building a central repository of plans, managing exercises to test those plans, and the ability to track plan execution during a crisis.

The following Administration items have been configured in the BCM module:

- Administrative Groupings

- Structures & Elements

    - Object Types

    - Record Types and Categories

    - Attributes

- Home Page Tabs

- BCM Workflows

    - Workflow States

    - Workflow Buttons

- Import Maps

Information about the preceding configurations will provide a baseline understanding before you start using the *Business Continuity Management Step-by-Step Tutorial* or begin to configure the module to meet your requirements.

Abbreviations Used in the Document

The following table lists the abbreviations used throughout the document.

Abbreviation	Expanded Form
BCP	Business Continuity Plan
BIA	Business Impact Analysis
BP	Business Process
BPO	Business Process Owner
BU	Business Unit
MAO	Maximum Allowable Outage
ORM	Operational Risk Management
RPO	Recovery Point Objective
RTO	Recovery Time Objective

Administrative Groupings

Administrative groupings in Rsam allow you to identify administrative elements that serve a common function and to create logical groupings for them. The administrative elements for BCM module are grouped and can be found in the **Administrative Groupings** page in Rsam. This allows for easier classification and management of the administrative elements associated with the module. In the *Admin* module, you can filter your views to show only the administrative elements from the BCM module by clicking the filter icon ▽.
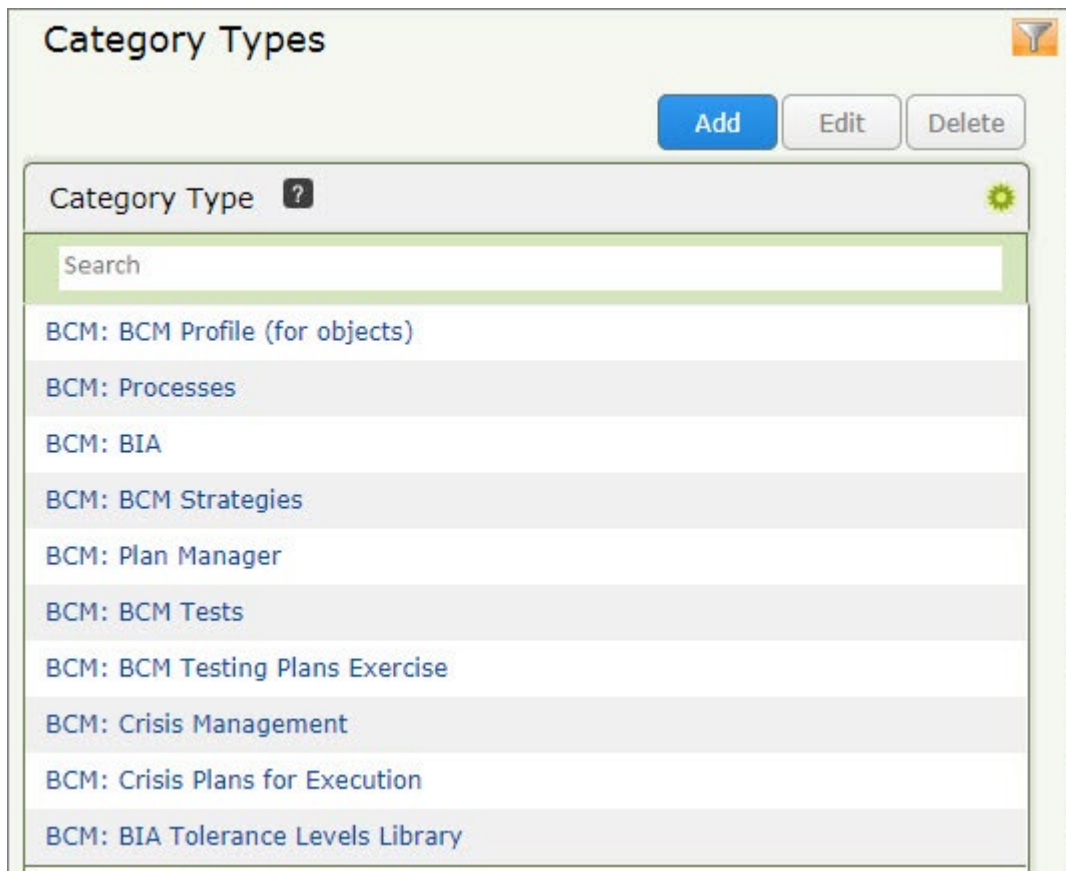
The baseline configurations for the BCM module are associated with the Admin Group - **Template – Business Continuity – BCM**.

BCM Structure

All processes, BIAs, strategies, exercises, and crisis details in the BCM module are stored in the Object Type - **Library for Global Records**. Actual plans, testing records, and execution records are stored under different object types for assets, such as Applications, Facilities, Vendors and more.

Processes, BIA, BCM Strategies, Crisis and BCM Tests

The following diagram represents the structure.
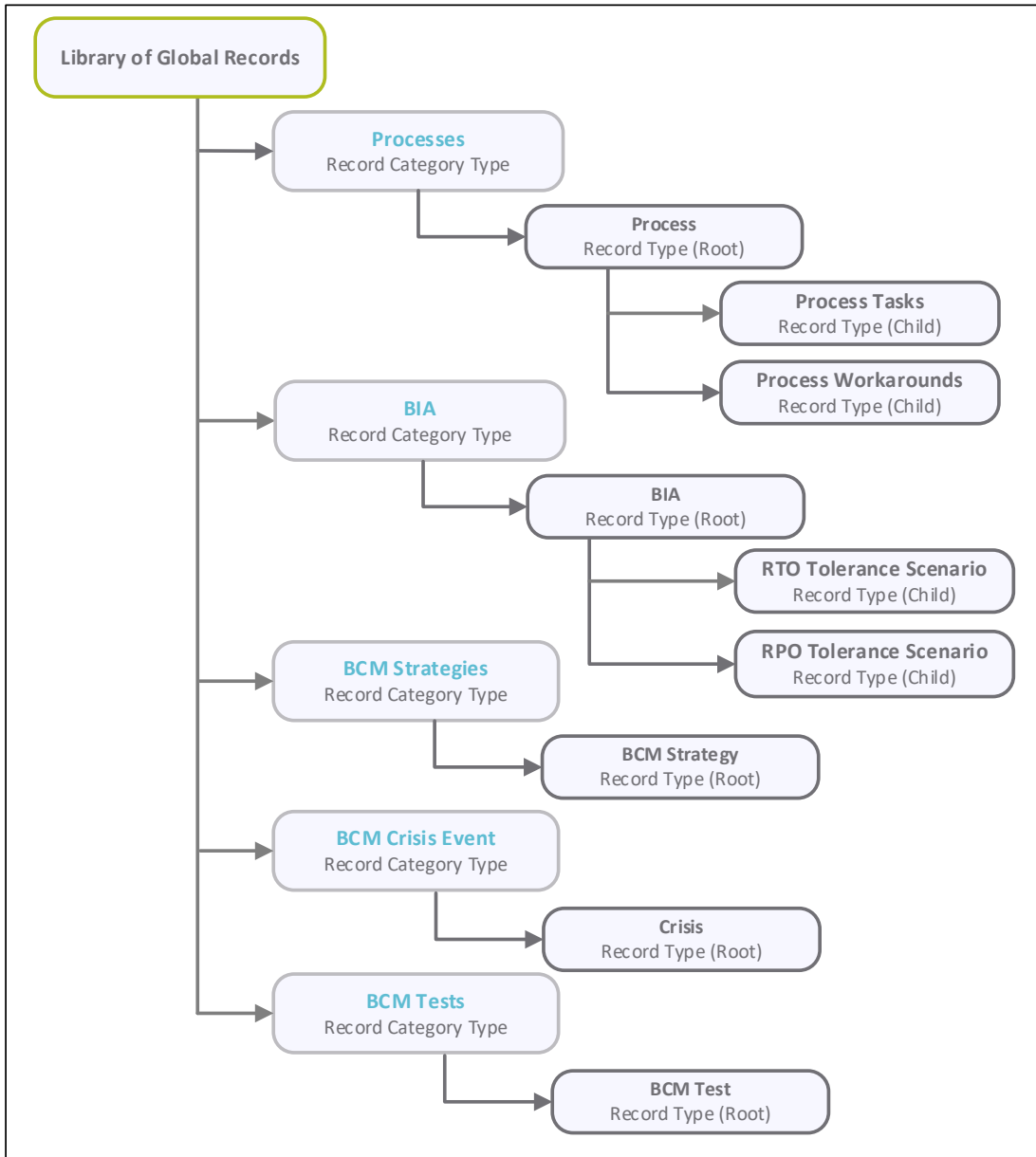
BCM Profile, Plans and Plans for Execution

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│            │                           ├──▶│      Call Tree       │  │
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│            ├─────▶│    Plan Exercise     │                           │
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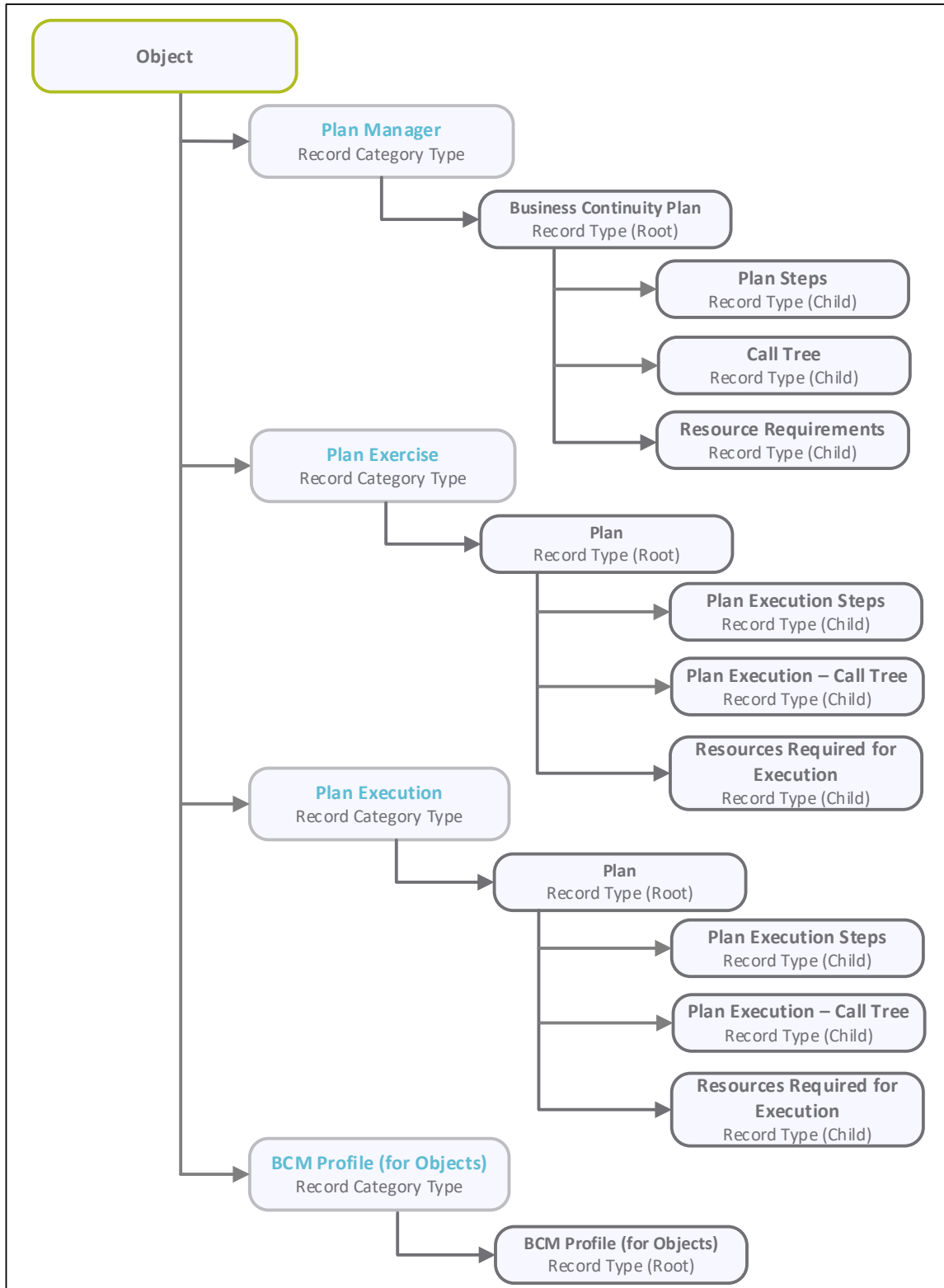
Object Types

The following table lists the Object Types that are pre-configured in the BCM module.

Object Type	Usage
Library for Global Records	Standard library object under which all incident processes, BIAs, and crisis records are stored.
Library for Definitions	Standard library object that stores all the Business Impact Analysis tolerance scenarios.
Asset Objects	A series of standard objects representing various assets are included in the BCM process. Business continuity plans, test executions, and crisis executions are all stored in actual asset objects (such as Applications, Data Centers, Vendors and more). User can control the level of details for their planning and testing though the object definitions.
Physical Facility	A series of standard objects representing each of the facilities are included in the BCM process. Emergency facility plans are stored within these objects. These are also used as part of creating, management, and testing of the BCM plans.

Record Types

The following table lists the Record Types that have been pre-configured in the BCM module.

Record Type	Usage
BCM Profile	A record type representing the BCM metadata of an object. Each object in the BCM scope will have one associated BCM Profile record. BCM Profile represents the BCM metadata, such as RTO, RPO, MAO, Related BCM Strategy, Related Business Continuity Plan (BCP), etc.
Process	A record representing a business process. Customers who use business processes as a part of their business continuity management should perform a BIA against each applicable process. Processes are also related to upstream and downstream processes, and can have dependencies on assets (such as applications).
Process Tasks	A record representing a major task associated with the process. Each task record represents a part of the process considered in the BCP.
Process Workarounds	A record detailing a workaround method to be executed, if the organization is unable to complete any tasks. Workarounds can be created automatically for each task. These records are for documentation and analysis, and do not contribute to the overall workflow for BCM.
Strategy	A record representing the plan to be used for an asset (object type) in case of a BCM scenario / risk. Each record represents the high-level plan of action for the BCM scenario / risk to be addressed by the associated business continuity plan.

Record Type	Usage
Business Continuity Plan	A record representing a plan to recover / restore an asset in the case of an event / crisis. Plans are documented for various assets (objects), and consists of one or more plan steps. When a plan is exercised or activated for a crisis, a copy of the plan is created automatically and sent to the Plan Owner.
Plan Steps	A record representing an individual step within the plan. A collection of steps document what steps should be followed in the event of a crisis. They include step order, instructions, and any necessary attachments required to complete the step. Steps are copied into plan exercise records when plans are tested and copied into plan executions in the event of a crisis.
Call Tree	A record within the BCP, representing the list of individuals, authorities, and teams to be notified when a crisis occurs. Each record should include information, such as whom to be notified, contact details, sequence, and who will initiate the communication.
Resource Requirements	A record within the BCP, representing the list of resources and quantities that will be required during various crisis intervals.
BCM Tests	A record representing an exercise or test for one or more plans. Exercises can be executed against an individual asset, multiple assets, or all assets supporting selected processes. When a testing starts, plan execution and its child records plan execution steps, Plan Execution - Call Tree, Plan Execution – Resources required are created within each related asset automatically, based on the type of testing.
Crisis	A record representing an individual crisis that invokes a continuity plan. Crisis records are related to assets and / or processes. When a crisis is activated, Rsam automatically generates the plan execution and Plan Execution - Call Tree, Plan Execution – Resources required, and Plan execution steps in each related asset.
Plan Execution	A record representing a plan that is being executed as a part of a crisis or BCP testing. When a crisis/BCP testing is activated, plan execution records are created within the related assets.
Plan Execution - Call Tree	A record within the plan execution, representing the list of individuals, authorities, and teams to be notified when a crisis happens. Each record includes information, such as whom to be notified, contact details, sequence, and who should initiate the communication.
PE – Resources Required for Execution	A record within the plan execution, representing the list of resources and quantities that will be required during the various crisis intervals.
Plan Execution Steps	A record representing an individual step within a plan execution. A collection of steps is followed to complete the notification / response / recovery / restoration of that asset.

Record Type	Usage
BIA	A record representing a Business Impact Analysis that is being used to assess one or more processes of asset, A BIA consists of a series of scenarios to determine the time-frame threshold by which the related processes and assets will have a significant impact on the organization. This is then used to calculate an RTO and RPO for each related process and/or asset
RTO Tolerance Scenario	A record representing the length of time (in hours) that a process and/or asset can be unavailable before having significant impact on the organization (Recovery Time Objective)
RPO Tolerance Scenario	A record representing the level of data loss (in hours) that can occur for a process and/or asset before having a significant impact on the organization (Recovery Point Objective)
BIA Tolerance Scenario Library	A record that stores the pre-defined scenarios for use in the BIA. Customers that wish to add / modify / remove from the scenarios considered during a Business Impact Analysis can edit this library.

Home Page Tabs

The baseline configuration of the BCM module contains several Home Page tabs. These tabs can be configured for various roles and can be assigned to users to complete tasks. The following table lists the Home Page tabs available in the BCM module.

Home Page Tab	Description
BCM Dashboards & Alerts	Provides charts and status of the most vital records within the business continuity module. Provides analytical results of the various assets, BCM profile within the tool, and their current adequacy to meet the RTO.
BCM Universe	Provides quick links to all parts of the BCM module.
Process & BIA	Provides access and basic status reporting on documented process and Business Impact Analysis record.
Strategy Management	Provides access to the BCM Strategies and their current workflow status and association with BCPs.
Plan Management	Provides access to the BCM plans across all assets (Objects). Also provides the status of all plan generation / approval. Displays plans across all assets by current workflow state, asset, type, etc.
Crisis Management	Provides access to the Crisis Records and all plans being actively executed. Also provides an overview of the status of the crisis and at the individual asset plan execution level. Displays crisis across all assets by their current workflow state, asset, type, etc.
BCM Test Management	Provides access to the COOP Exercises and all plans being actively tested. Also provides the type of testing, overview status of the testing and at the individual asset plan testing level. Displays exercises across all assets by their current workflow state, asset, type, etc.
Plan Execution Navigator	Provides navigation to all the Crisis plans for execution generated in the system.
Plan Exercise Navigator	Provide navigation to all BCM test plan exercises generated in the system.

BCM Workflows

This section covers details on the workflow roles and baseline workflows of the different record types in the BCM module.

Workflow Roles

The following table lists the workflow roles to perform tasks associated with various states in the baseline BCM workflows.

Note: Sample users for each of these roles are optionally provided with the baseline module installation package.

User ID	Workflow Role	Related Organizational Roles	Related BCM Activities	Role Description
r_bcm_ manager	BCM Manager	Operational Risk Management (ORM) Team BCM Manager	All BCM Activities	Overall authority / head of BCM team and can perform tasks in all states for business continuity. This includes processes, plans, exercises, crisis, and other areas of BCM.
r_bcm_ analyst	Business Continuity Analyst	ORM Team BCM Team Member	All BCM Activities	Assigned to the BCM team members involved in the process, BIA, and other data gathering activities related to BCM and coordinates with Crisis team for the BCM Crisis and testing activities.
r_bcm_ bpo	Business Process Owner (BPO)	Organization Business Process Owner Senior Team member involved in the Business Process	Business Process Definition BIA Plan Development	Business Process Owners have visibility into their assigned processes, can edit the process, and create the steps and workarounds.
r_bcm_ bpo_exec	BPO Executive	Manager or Head of the Department that owns the Business Process	Business Process Data Review BIA Review Plan Review Crisis – Plan Execution Review	BPO Executives can review business processes and results of the BIA. They have the authority to accept or reject the information entered for the process.

User ID	Workflow Role	Related Organizational Roles	Related BCM Activities	Role Description
r_bcm_ bia_owne r	BIA Owner	ORM Team BCM Team Member	BIA	Assigned to the BIA Owner responsible for completing all details and scope for the BIA and submitting it for review.
r_bcm_ bia_revie wer	BIA Reviewer	BPO Head of the BU in the scope for the BIA	BIA	This role is assigned to the reviewer of the BIA (typically a group of users). The reviewer is responsible for reviewing the owner's input and accepting or rejecting the owner's decision.
r_bcm_ plan_own er	Plan Owner	BPO Head of the BU for which the plan is developed	BCM Plan Management	This role is assigned to the individual or business owner of the asset (object type) for which the plan is created. The owner is responsible for completing all details and submitting it for review to BCM Manager.
r_bcm_ plan_con tributor	Plan Contributor	Experienced person in the BU BPO / Head of the BU for which the plan is developed	BCM Plan Building	This role is assigned to business unit seniors / head who has better understanding of the activities performed during business as usual and unusual situations. Users assigned this role are responsible for building the plan with all required details.
r_bcm_ crisis_lea der	Crisis Leader	BCM Expert / Senior BCM Team Member Affected BU Senior Staff / HoD	Crisis & BCM Testing	Assigned to a senior member in the recovery team at the time of crisis. During BCM Testing, the person has full control over the crisis / BCM Testing, including assignment of the Crisis Team Members and execution of all workflow actions.
r_bcm_ crisis_tm	Crisis Team Member	BU Team BCM Co-ordinators Key members of the BU affected by the crisis	Crisis & BCM Testing	Assigned to members in the BU, who have a role to play in recovering the business back to normal. These users can see the crisis / BCM testing and plans for execution of tasks assigned to them.

In addition to the above roles, the Rsam installation package includes an administrative role, **U: Object Administrator**, as well as a sample user for that role, **r_admin**. This user has access to all record types, object types, workflow states, and workflow buttons across all Rsam baseline modules. Rsam Administrators should take necessary precautions to restrict standard users from accessing Rsam with this administrative role.

BCM Workflows

This section explains the workflows of the different BCM components.

Before proceeding to the specific workflows, it is recommended that you familiarize yourself with the following Rsam workflow diagram key.
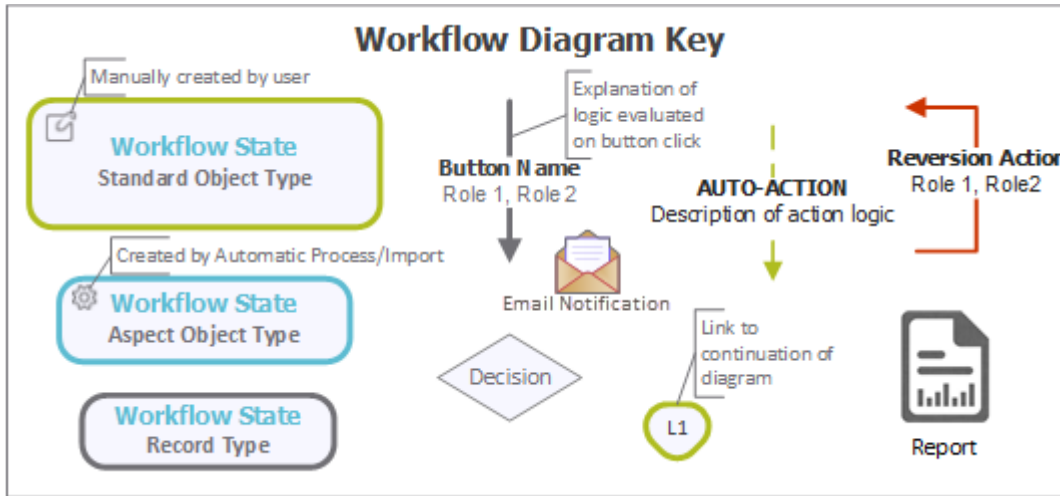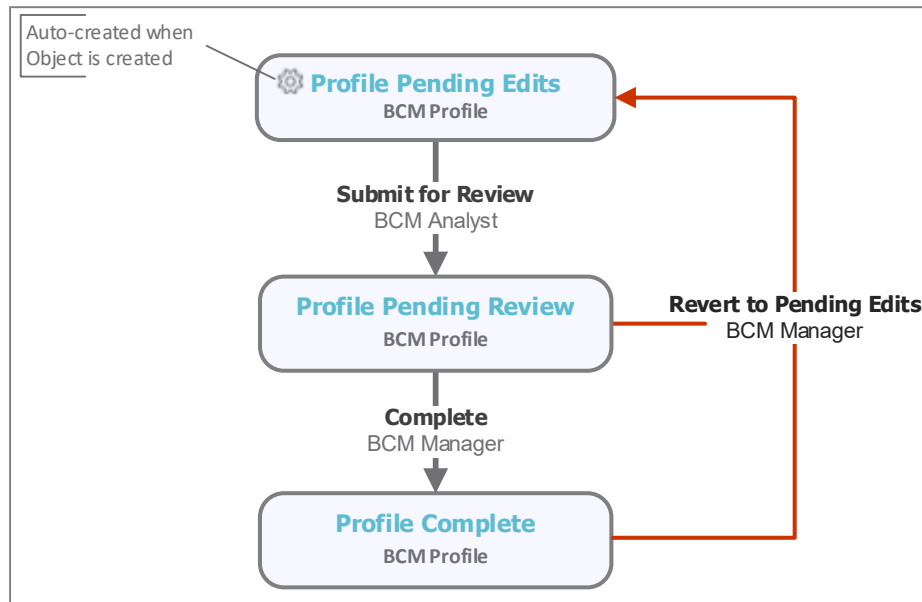

BCM Profile Workflow

This section covers the Workflow diagram, states, and buttons used in the baseline BCM Profile workflow in the BCM module.

Workflow Diagram

The following image shows the BCM Profile workflow.

Workflow States

The following table lists the workflow states for the BCM Profile.

Workflow State	Description
BCM: Profile Pending Edits	A BCM Profile starts in the **Profile Pending Edits** state. The BCM Profile is generated by clicking **Generate BCM Profile**. When the Profile is in this state, the user can update the BIA, BCM Strategy, and Plan details by clicking **Update BCM Data**.
BCM: Profile Pending Review	In this state, a BCM Manager reviews details of the BCM Profile and can move it to the next state - **Profile Complete**.
BCM: Profile Complete	This is the final state for the BCM Profile record. The record remains in this state until the *BCM Manager* or *Object Administrator* moves the record back to **Profile Pending Edits** state.

Workflow Buttons

The following table buttons available in the various states of the baseline Profile workflow.

Button	Available to	Notification	Description
BCM: Profile - Submit for Review	BCM Analyst Object Administrator	Yes	Available in the **Profile Pending Edits** state. Clicking this button moves the workflow state to **Profile Pending Review**.
BCM: Profile - Complete	BCM Manager	Yes	Available in the **Profile Pending Review** state. Clicking this button moves the workflow state to **Profile Complete**.
BCM: Profile - Revert to Pending Edits	BCM Manager	Yes	Available in the **Profile Pending Review** state. Clicking this button moves the workflow state to **Profile Pending Edits**.
BCM: Profile - Update BCM Data	BCM Analyst Object Administrator BCM Manager	No	Available in the **Profile Pending Review** state. Clicking this button fetches the following information from related BIA and Related Strategies records: • RTO, RPO, MAO from related BIA record (updated only if the RTO, RPO, MAO values are unanswered in the Profile record) • Associated BCPs

Process Workflow

This section covers the Workflow diagram, states, and buttons used in the Process workflow in the BCM module.

Workflow Diagram

The following image shows the Business Process workflow.

Workflow States

The following table lists the workflow states associated with the baseline Process workflow.

Workflow State	Description
BCM: Process -Draft	Business processes start in the **Process – Draft** state. Generally, the complete inventory of processes is defined and remains in this workflow state until the process is moved to the **Process – BPO Data Gathering** state.
BCM: Process - BPO Data Gathering	In this state, a *BPO* provides all details of the processes, including upstream and downstream processes and dependent assets.
BCM: Process - In BCA Review	In this state, with all details in place, a *BCM Analyst* reviews the information and provides additional details, if required.
BCM: Process - Create Workaround Steps	In this state, a *Business Process Owner* creates and submits the workaround steps for each of the process steps.
BCM: Process - Review Workaround Steps	In this state, a *Reviewer* reviews the information and accepts or rejects the workaround steps.
BCM: Process - Final Process Review	In this state, a *BCM Analyst* performs a final review and activates the process.
BCM: Process - Active	This is the final workflow state for the process.

Workflow Buttons

The following table lists the buttons available in the various states of the baseline Process workflow.

| Button	Available to	Notification	Description
BCM: Process - Start BPO Responses	BCM Analyst BCM Manager	Yes	Available in the **Draft** state. Clicking this button moves the process to the **Process – BPO Data Gathering** state.
BCM: Process - Submit for BCA Review	BPO BPO Manager	Yes	Available in the **BPO Data Gathering** state. Clicking this button moves the process to the **Process – In BCA Review** state.
BCM: Process - Submit for BPO Review	BCM Analyst BCM Manager	Yes	Available in the **In BCA Review** state. Clicking this button moves the process to the **Process – In BPO Review** state.
BCM: Process - BIA Initial Intake Complete	BPO Executive BPO Manager	Yes	Available in the **In BPO Review** state. Clicking this button moves the process to the **Process – BIA Initial Intake Complete** state.

Button	Available to	Notification	Description
BCM: Process - Generate / Rebuild Workaround Steps	SME BCM Analyst BPO BCM Manager	No	Available in the **Draft**, **BPO Data Gathering, In BCA Review, In BPO Review, BIA Initial Intake Complete, Create Workaround Steps, Review Workaround Steps** states. This button generates the workaround steps for the process.
BCM: Process - Create Workaround Steps	BCM Analyst BCM Manager	Yes	Available in the **Process – BIA Initial Intake Complete** state. Clicking this button moves the process to the **Process – Creating Workaround Steps** state.
BCM: Process - Submit Workaround Steps for Review	BPO BPO Manager	Yes	Available in the **Create Workaround Steps** state. Clicking this button moves the process to the **Process – Review Workaround Steps** state.
BCM: Process - Submit for Final Review	BCM Analyst BCM Manager	No	Available in the **Process – Review Workaround Steps** state. Clicking this button moves the process to the **Process – Final Process Review** state.
BCM: Process - Activate Process	BCM Analyst BCM Manager	No	Available in the **Process – Final Process Review** state. Clicking this button moves the process to the **Process – Active** state.
BCM: Process - Revert to Creating Workaround Steps	BCM Analyst BCM Manager	Yes	Available in the **Review Workaround Steps**, **Final Process Review**, and **Active** states. Clicking this button moves the process to the **Process – Creating Workaround Steps** state.
BCM: Process - Process Rejected	BCM Analyst BCM Manager BPO Executive	Yes	Available in the **In BCA Review** and **In BPO Review** states. Clicking this button moves the process to the **Process – BPO Data Gathering** state.
BCM: Process - Revert to Draft	BCM Manager	Yes	Available in the **BPO Data Gathering**, **In BCA Review, In BPO Review, BIA Initial Intake Complete, Create Workaround Steps, Review Workaround Steps, Final Process Review**, and **Active** states. Clicking this button moves the process to the **Process – Draft** state.
BCM: Process - Update RTO/RPO/MAO	BCM Analyst BPO BCM Manager BPO Executive	No	Available in the **Draft**, **BPO Data Gathering, In BCA Review, In BPO Review, BIA Initial Intake Complete, Create Workaround Steps, Review Workaround Steps**, and **Final Process Review** states. This button recalculates the RTO/RPO ratings.

BIA Workflow

This section covers the Workflow diagram, states, and buttons used in the BIA workflow in the BCM module.

Workflow Diagram

The following image shows the baseline BIA workflow.
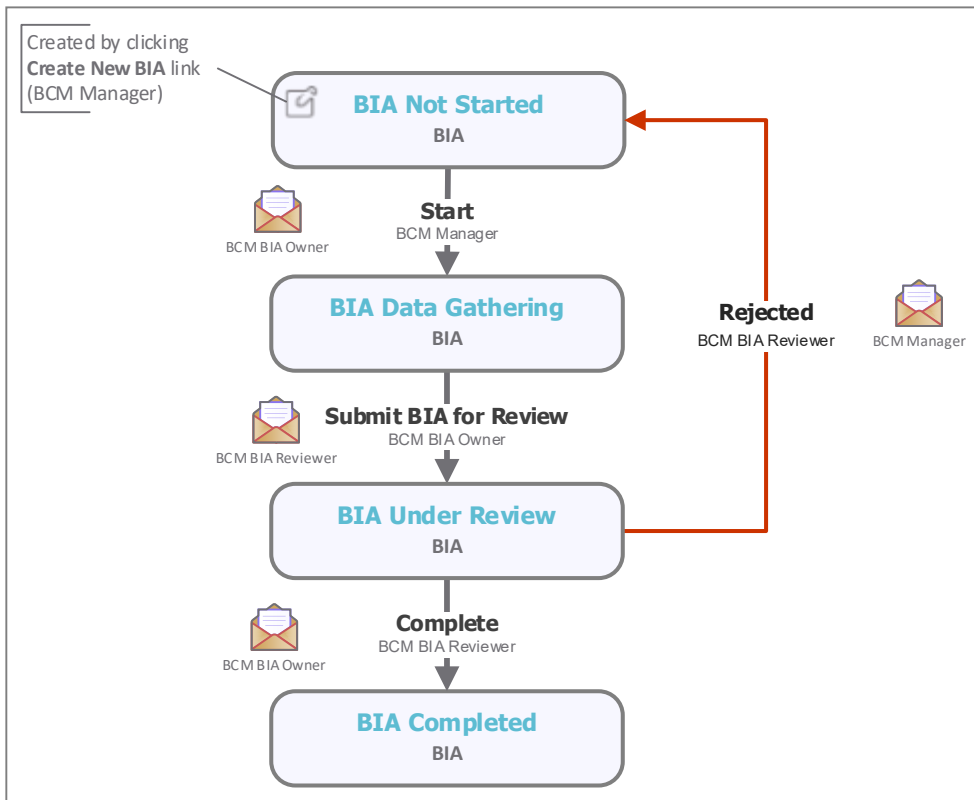
Workflow States

The following table lists the workflow states associated with the baseline BIA workflow.

Workflow State	Description
BCM: BIA Not Started	A BIA starts in this workflow state and remains in this state until the owner moves the BIA to the **BIA Data Gathering** state.
BCM: BIA Data Gathering	The owner provides details about the BIA, sets the scope, related processes and / or related assets.
BCM: BIA Under Review	In this state, a *Reviewer* reviews the BIA and accepts or rejects the BIA.
BCM: BIA Completed	A BIA moves to this state when it is approved. In this state, the results are calculated (RTO/RPO/MAO) and the values are pushed to the related processes or related assets.

Workflow Buttons

The following table lists the buttons available in the various states of the baseline BIA workflow.

| Button	Available To	Notification	Description
BCM: BIA - Pull All Relationships from Dependencies	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all assets, based on the selected processes.
BCM: BIA - Pull Related Applications	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent applications, based on the selected processes.
BCM: BIA - Pull Related Hosts	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent hosts, based on the selected applications.
BCM: BIA - Pull Related Databases	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent databases, based on the selected processes.
BCM: BIA - Pull Related Facilities	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent facilities, based on the selected processes.

Button	Available To	Notification	Description
BCM: BIA - Pull Related Vendors	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent vendors, based on the selected processes.
BCM: BIA - Pull Related Medical Devices	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button executes the process of associating the BIA with all dependent medical devices, based on the selected processes.
BCM: BIA - Pull Related People	N/A	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. Clicking this button manually executes the process of associating the BIA with all related people based on the selected processes.
BCM: BIA – Start	BIA Owner BCM Manager	Yes	Available in the **BIA Not Started** state. Clicking this button moves the BIA workflow to the **Data Gathering** state and starts the BIA process.
BCM: BIA – Submit BIA for Review	BIA Owner BCM Manager	Yes	Available in the **BIA Data Gathering** state. Clicking this button signifies that the assessment is complete and moves the BIA to the **BIA Under Review** state.
BCM: BIA – Complete	BIA Reviewer BCM Manager	Yes	Available in the **BIA Under Review** state. Clicking this button signifies that the reviewer has validated that the BIA is complete.
BCM: BIA - Revert to Not Started	BIA Reviewer BCM Manager	Yes	Available in the **BIA Data Gathering**, **BIA Under Review**, and **BIA Complete** states. Clicking this button moves the BIA workflow to the **BIA Not Started** state.
BCM: BIA - Recalculate BIA RTO/RPO	BIA Owner BCM Manager	No	Available in the **BIA Not Started** and **BIA Data Gathering** states. This button recalculates BIA RTO and RPO values, based on the selected scenarios.
BCM: BIA Tolerance - Calculate BIA Ratings	BIA Owner BCM Manager	No	Clicking this button calculates various BIA ratings, based on the scenarios.
BCM: BIA Tolerance - Update	BIA Owner BCM Manager	No	Clicking this button updates the RTO Tolerance Scenario and RPO Tolerance Scenario records.
BCM: BIA Tolerance - Save & Close	BIA Owner BCM Manager	No	Clicking this button saves the BIA ratings and closes the RTO Tolerance Scenario and RPO Tolerance Scenario records.

BCM Strategy Workflow

This section covers the Workflow diagram, states, and buttons used in the BCM Strategy workflow in the BCM module.

Workflow Diagram

The following image shows the BCM Strategy workflow.
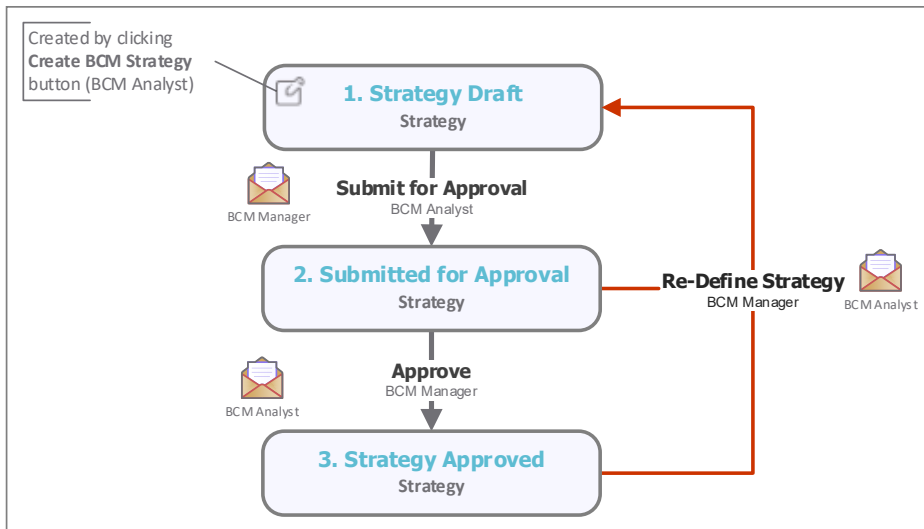
Workflow States

The following table lists the workflow states associated with the BCM Strategy workflow.

Workflow State	Description
BCM: Strategy - Strategy Draft	A BCM strategy starts in this workflow state and remains in this state until the *BCM Analyst* submits it to the *BCM Manager* for review and approval.
BCM: Strategy - Submitted for Approval	When the BCM strategy is submitted for review and approval, it goes through a review process by the *BCM Manager*, who can approve or reject the strategy. If approved the strategy moves to the **Strategy Approved** state. If rejected, the record moves to **Strategy Draft** state.
BCM: Strategy - Strategy Approved	After approval, the strategy remains in this state till the *BCM Manager* moves the record to **Strategy Draft** state, if required.

Workflow Buttons

The following table lists the buttons available in the various states of the BCM Strategy workflow.

Button	Available to	Notification	Description
BCM: Strategy - Submit for Approval	BCM Analyst	Yes	Available in the **Strategy – Strategy Draft** state. In this state, a *BCM Analyst* submits the strategy for *BCM Manager* review and approval.

Button	Available to	Notification	Description
BCM: Strategy - Strategy Approved	BCM Manager	Yes	Available in the **Strategy – Submitted for Approval** state. *BCM Manager* approves the strategy and it moves to **Strategy – Strategy Approved** state.
BCM: Strategy - Re-Define Strategy	BCM Manager	Yes	Available in the **Strategy – Submitted for Approval** state. Clicking this button moves the strategy to the **Strategy – Strategy Draft** state.

Plan Management Workflow

This section covers the Workflow diagram, states, and buttons used in the Plan workflow.

Workflow Diagram

The following image shows the baseline Plan workflow.

Workflow States

The following table lists the workflow states associated with the baseline Plan workflow.

Workflow State	Description
BCM: Plan – Draft	A BCM plan starts in this workflow state and remains in this state until the *BCM Manager* submits it to *Plan Owner* for data gathering and building the plan with all required information.
BCM: Plan – Data Gathering	The *Plan Owner* provides information about the plan and assigns the plan contributors to provide more technical information about the task to be performed, as part of the plan.
BCM: Plan – Build Plan	The Plan will be built by the plan contributors by pulling the associated BIA data, Process Task, and workaround information from related records. *Plan Contributors* should submit the plan for review after adding plan information, such as resources required to execute the plan, steps to be followed, individuals / authorities to be informed.
BCM: Plan – Under Review	After submission for approval, a plan goes through a review process by the *Plan Owner*. Here the *Plan Owner* can accept or reject the plan. If accepted, the plan will be submitted to the *BCM Manager* for next level of approval.
BCM: Plan – Pending BCM Manager Review	After submission for approval, the *BCM Manager* can review the plan and accept or reject the plan. If the plan is accepted, the plan moves to the **Published** state.
BCM: Plan – Published	Once a plan is approved, it remains in the **Published** state and can be used as a part of an exercise or crisis.
BCM: Plan – Due for Revision	If a plan revision date is associated with the plan, it will auto-expire after the expiration date passes. Here the *BCM Manager* or *BCM Analyst* can initiate the plan revision.

Workflow Buttons

The following table lists the buttons available in the various states of the baseline Plan workflow.

Button	Available to	Notification	Description
BCM: Plan – Start Data Gathering	BCM Manager BCM Analyst	Yes	Available in the **Plan – Draft** state. Clicking this button submits the plan to *Plan Owner* for further data gathering and plan building.
BCM: Plan – Build Plan	Plan Owner BCM Manager	Yes	Available in the **Plan – Data Gathering** state. Clicking this button submits the plan to *Plan Contributors* for developing the plan.
BCM: Plan - Pull the Associated BIA Data	Plan Contributor BCM Manager	No	Available in the **Plan – Build Plan** state. Clicking this button will pull the BIA information related to the Object under which the plan is created.
BCM: Plan - Submit for Review	Plan Contributor BCM Manager	Yes	Available in the **Plan – Build Plan** state. Clicking this button submits a plan to *Plan Owner* for review.

| Button	Available to	Notification	Description
BCM: Plan – Submit for BCM Manager Review	Plan Owner BCM Manager	Yes	Available in the **Plan – Under Review** state. Clicking this button approves the plan and moves it to the **Plan – Pending BCM Manager Review** state.
BCM: Plan – Rebuild Plan (Under Review)	Plan Owner	Yes	Available in the **Plan – Under Review** state. Clicking this button rejects the plan and moves it to the **Plan – Build Plan** state.
BCM: Plan – Rejected (BCM Manager Review)	BCM Manager	Yes	Available in the **Plan – Pending BCM Manager Review** state. Clicking this button rejects the plan and moves it to the **Plan – Build Plan** state.
BCM: Plan – Plan Approved	BCM Manager	Yes	Available in the **Plan – Pending BCM Manager Review** state. Clicking this button approves the plan and moves it to the **Plan - Published** state.
BCM: Plan - Revert to Draft	BCM Manager	Yes	Available in the **Plan – Build Plan**, **Plan – Under Review**, and **Plan – Pending BCM Manager review** states. Clicking this button reverts the plan to **Plan – In Draft** state.
BCM: Plan – Initiate Plan Revision	BCM Manager BCM Analyst	Yes	Available in the **Plan – Published** and **Plan – Due for revision** state. Clicking this button initiates the plan revision.
BCM: Plan - Generate Plan Exercise	BCM Manager	No	Available in the **Published** state. Clicking this button generates exercises from the selected plan. This happens automatically during an Exercise. However, managers can invoke this by clicking this button.
BCM: Plan - Generate Plan Execution	BCM Manager	No	Available in **Published** state. Clicking this button generates crisis recovery records from the selected plan. This happens automatically during a Crisis and managers can also click this button manually.
BCM: Plan – Copy Related Process Task	Plan Contributor	No	Clicking this button copies the Related Process, process steps, and adds them as plan steps in the Plan record.
BCM: Plan – Copy Related Process Workaround	Plan Contributor	No	Clicking this button copies the Related Process, process workarounds and adds them as plan steps in the Plan record.
BCM: Plan – Calculate Plan Execution Duration	BCM Manager	No	Clicking this button calculates the best-case execution time and worst-case execution time for the plan.
BCM: Plan – Plan vs RTO validation	BCM Manager	No	Clicking this button validates the plan execution duration time against the RTO of the Object, under which the plan is created. If the Plan execution duration is greater than the RTO value, then the Plan Efficiency is updated to **Inadequate**, else Plan efficiency is updated to **Adequate**.

BCM Tests Workflow

This section covers the Workflow diagram, states, and buttons used in the BCM Tests workflow in the BCM module.

> **Note:** The Admin names for Workflow states / buttons, starting with **BCM Event** are used in both BCP Testing and Crisis record types. States / buttons exclusive to BCM Tests have the Admin names starting with **BCM Testing**.

Workflow Diagram

The following image shows the baseline BCM Tests workflow.
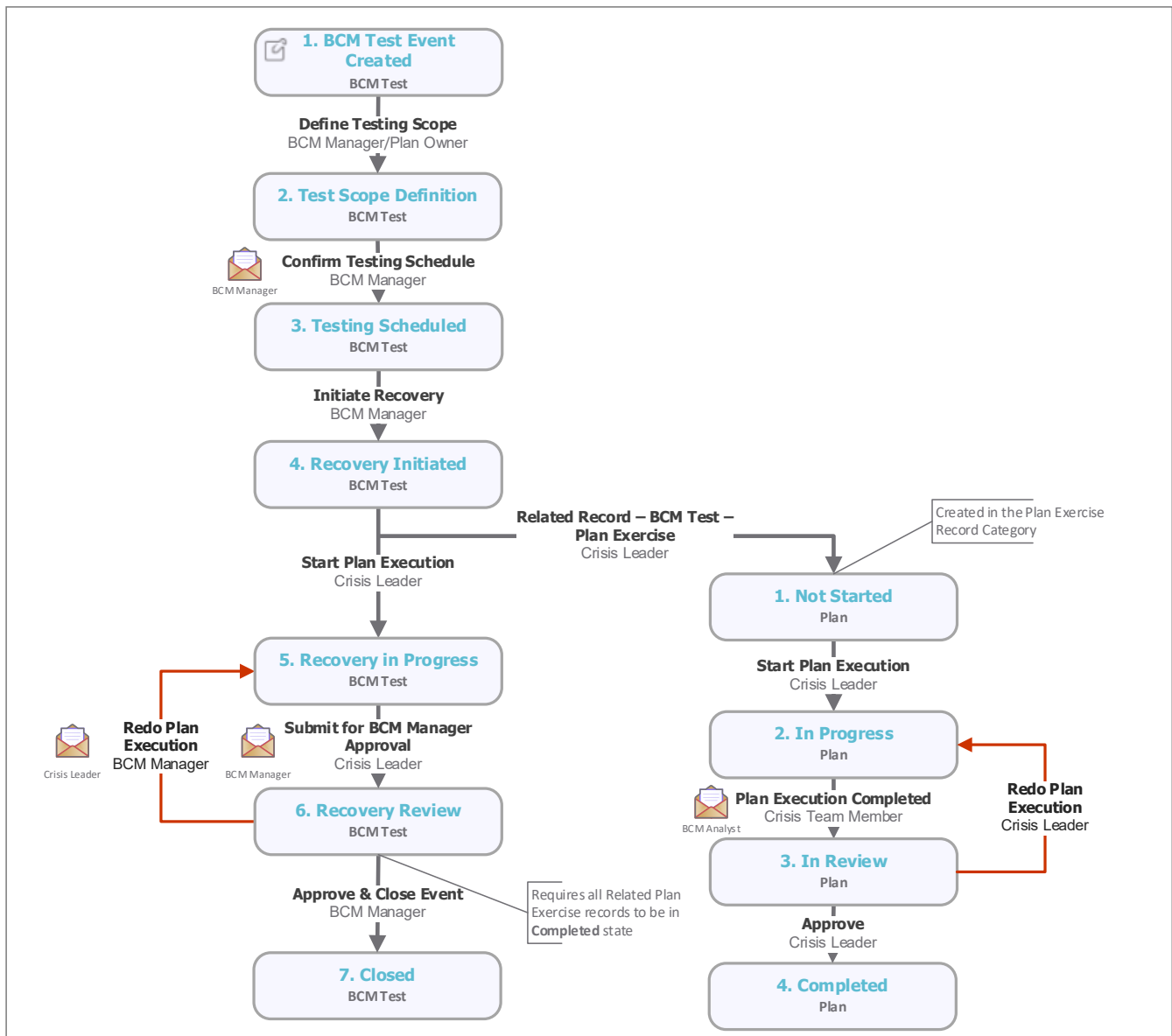
BCM Tests Workflow States

The following table lists the workflow states associated with the baseline BCP Testing workflow.

Workflow State	Description
BCM: BCM Testing –Test Event Created	A BCP Testing starts in this workflow state and remains in this state until the *BCM Analyst* starts the scope definition and test scheduling process. Here the Analyst can provide the basic details about the testing.
BCM: BCM Testing – Test Scope Definition	In this state, the *BCM Manager* provides the remaining details / scoping information. When all information is provided, the *BCM Manager* declares that the scoping and scheduling is complete.
BCM: BCM Testing – Testing Scheduled	The record is scheduled for testing in this state and waits till the scheduled date to start the exercise. Once all members are prepared for the testing, the *Crisis Leader* can start the testing process. You can also choose to have an exercise enter the testing state automatically on a specified date.
BCM: Recovery Initiated	In this state, all related plan executions and associated child records are automatically generated in the targeted assets (objects). This starts the exercise test workflow steps for each plan.
BCM: Recovery in Progress	In this state, the plan executions are executed and the results are recorded. The *Crisis Leader* verifies the results and submits it to *BCM Manager* for next level of approval.
BCM: Recovery Review	In this state, a *BCM Manager* can review the test process and results, and accept or reject the overall testing plan execution.
BCM: BCM Event Closed	This is the final state for a completed exercise.

BCM Testing – Plans Exercise Workflow States

The following table lists the states associated with the baseline BCM Testing – Plans Exercise workflow.

Workflow State	Description
BCM: PE – Not Started	Each plan exercise starts in this workflow state. It remains in this workflow state until the *Crisis Leader* or BCM Team assigns the Plan Exercise to a BCM Testing.
BCM: PE – In Progress	Once a BCM Tests record is associated with the Plan Exercise, the record moves to this state. Each plan exercise and associated plan steps, call tree, resources required will be executed by the crisis execution team. It remains in this workflow state till the crisis execution team completes all plan steps and provides the plan exercise results and submits it for review.
BCM: PE – In Review	When the plan exercise is completed, the *Crisis Team Member* can submit the record for review and it moves to this state, to be reviewed by the *Crisis Leader*.
BCM: PE – Completed	This is the final workflow state for the plan exercise.

BCM Tests Workflow Buttons

The following table lists the buttons available in the various states of the baseline BCP Testing workflow.

Button	Available to	Notification	Description
BCM: BCM Testing - Define Test Scope	BCM Analyst	Yes	Available in the **BCM Test Event Created** state. Clicking this button moves the test to **Test Scope Definition** state.
BCM: BCM Testing - Confirm Testing Schedule	BCM Manager	Yes	Available in the **Test Scope Definition** state. Clicking this button moves the test to **Testing Scheduled** state.
BCM: BCM Event - Initiate Recovery	BCM Manager BCM Analyst Crisis Leader	Yes	Available in the **Testing Scheduled** state. Clicking this button moves the test to **Recovery Initiated** state.
BCM: BCM Event - Start Plan Execution	BCM Manager BCM Analyst Crisis Leader Crisis Team Member	Yes	Available in the **Recovery Initiated** state. Clicking this button moves the test to **Recovery in Progress** state and the child records to **Plan Execution in Progress** state.
BCM: BCM Event - Submit for BCM Manager Approval	Crisis Leader	Yes	Available in the **Recovery in Progress** state. Clicking this button moves the test to **Recovery Review** state.
BCM: BCM Event - Redo Plan Execution	BCM Manager	Yes	Available in the **Recovery Review** state. Clicking this button moves the test to **Recovery in Progress** state.
BCM: BCM Event - Approved	BCM Manager	Yes	Available in the **Recovery Review** state. Clicking this button moves the test to **BCM Event Closed** state.
BCM: BCM Event - Pull Related Assets	BCM Manager BCM Analyst Crisis Leader	No	Available in the **Test Event Created** and **Test Scope Definition** states. Clicking this button pulls all related objects.

BCM Testing - Plans Exercise Workflow Buttons

The following table lists the buttons available in the various states of the baseline BCM Testing – Plans Exercise workflow.

Button	Available to	Notification	Description
BCM: PE – Start Execution	Crisis Team Member	No	Available in the **Not Started** state. Clicking this button moves the plan exercise to **In Progress** state.
BCM: PE- Plan Execution Completed	Crisis Team Member	Yes	Available in the **In Progress** state. Clicking this button moves the plan exercise to **In Review** state.
BCM: PE - Approved	Crisis Leader	No	Available in the **In Review** state. Clicking this button moves the plan exercise to **Completed** state.
BCM: PE - Redo Plan Execution	Crisis Leader	Yes	Available in the **In Review** state. Clicking this button moves the plan to **In Progress** state.
BCM: PE – Revert to PE Created	BCM Manager BCM Analyst	Yes	Available in the **In Progress**, **In Review** and **Completed** state. Clicking this button moves the plan to **Not Started** state.

Crisis Workflow

This section covers the Workflow diagram, states, and buttons used in the Crisis workflow in the BCM module.

Note: The Admin names for Workflow states / buttons, starting with **BCM Event** are used in both BCM Tests and Crisis record types. States / buttons exclusive to Crisis have the Admin names starting with **Crisis**.

Workflow Diagram

The following image shows the baseline Crisis workflow.
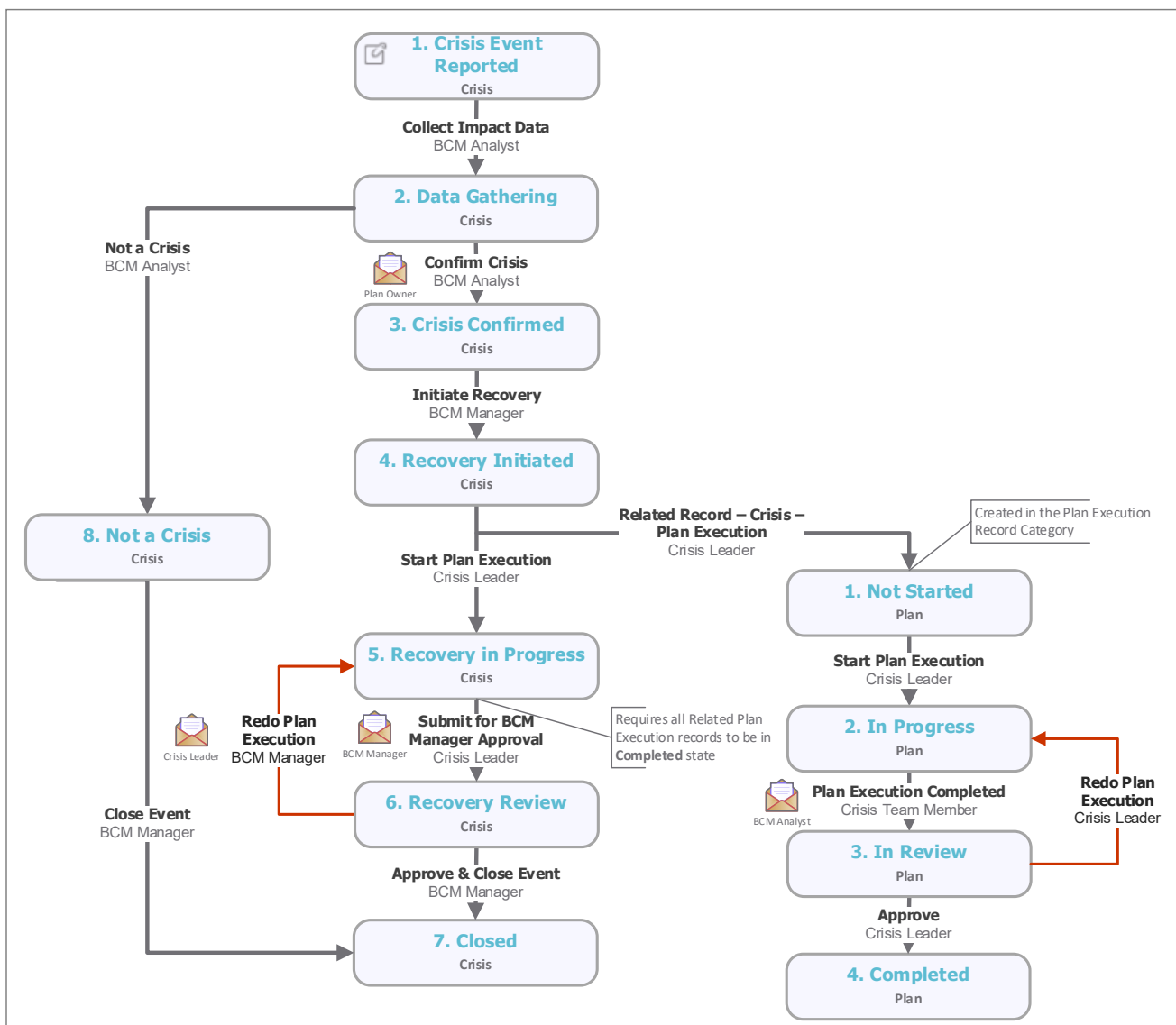
Crisis Workflow States

The following table lists the states associated with the baseline Crisis workflow.

Workflow State	Description
BCM: Crisis – Crisis Event Reported	A Crisis starts in this workflow state and remains in this state until the *BCM Analyst* starts the Impact data gathering process. The *BCM Analyst* can provide basic details about the testing.
BCM: Crisis – Data Gathering	In this state, *BCM Manager* provides the remaining details of the impact. Based on the impact analysis, the *BCM Manager* confirms the event as a Crisis or not.
BCM: Crisis – Crisis Confirmed	Once declared as Crisis, all related plan executions and associated child records are automatically generated in the targeted assets (objects). Once all members are prepared, the *Crisis Leader* can start the BCP Execution process.
BCM: Crisis – Not a Crisis	If a BCM event is declared as **Not a Crisis**, the record moves to this workflow state and remains in this state till the *BCM manager* closes the event.
BCM: Recovery Initiated	Once a BCP is initiated, the Plan execution workflow steps for each plan start.
BCM: Recovery in Progress	In this state, plan executions are executed and results are recorded. *Crisis Leader* verifies the results and submits it to *BCM Manager* for next level of approval.
BCM: Recovery Review	Once all related plans are executed, the crisis record moves this state. A *BCM Manager* can review the crisis recovery results and accept or reject the overall crisis plan execution.
BCM: BCM Event – Event Closed	This is the final state for a completed exercise.

Crisis – Plans for Execution Workflow States

The following table lists the states associated with the baseline Crisis – Plans for Execution workflow.

Workflow State	Description
BCM: PE – Not Started	Each plan for execution starts in this workflow state and remains in this workflow state until the *Crisis Leader* or BCM Team assigns the Plan Execution to a Crisis.
BCM: PE– In Progress	Once a Crisis is associated with the Plan Execution, the record moves to this state. Each plan Execution and its plan steps, call tree, resources required will be executed by the crisis execution team. It remains in this workflow state till the crisis execution team completes all plan steps, provides the recovery results, and submits it for review.
BCM: PE – In Review	When the plan execution is completed, the *Crisis Team Member* can submit the record for review and it moves to this state, to be reviewed by the *Crisis Leader*.
BCM: PE - Completed	This is the final workflow state for the plan execution.

Crisis Workflow Buttons

The following table lists the buttons available in the various states of the baseline Crisis workflow.

Button	Available to	Notification	Description
BCM: Crisis – Data Gathering	BCM Analyst BCM Manager	Yes	Available in the **Crisis – Crisis Event Reported** state. Clicking this button moves the record to **Crisis – Event Data Gathering** state.
BCM: Crisis - Confirm Crisis	BCM Manager BCM Analyst	Yes	Available in the **Crisis – Data Gathering** state. Clicking this button moves the record to **Crisis – Crisis Declared** state.
BCM: Crisis - Not a Crisis	BCM Manager BCM Analyst	Yes	Available in the **Crisis – Data Gathering** state. Clicking this button moves the record to **Crisis – Not a Crisis** state.
BCM: BCM Event - Initiate Recovery	BCM Manager BCM Analyst	Yes	Available in the **Crisis – Crisis Confirmed** state. Clicking this button moves the record to **BCM Event – Recovery Initiated** state.
BCM: BCM Event - Start Plan Execution	BCM Manager Crisis Leader	Yes	Available in the **BCM Event – Recovery Initiated** state. Clicking this button moves the record to **BCM Event – Recovery in Progress** state and the child records to **Plan Execution in Progress** state.
BCM: BCM Event - Submit for BCM Manager Approval	Crisis Leader	Yes	Available in the **BCM Event – Recovery in Progress** state. Clicking this button moves the record to **BCM Event – Recovery Review** state.
BCM: BCM Event - Redo Plan Execution	BCM Manager	Yes	Available in the **BCM Event – Recovery Review** state. Clicking this button moves the record to **BCM Event – Recovery in Progress** state.
BCM: BCM Event - Approved	BCM Manager Crisis Leader	Yes	Available in the **BCM Event – Recovery Review** state. Clicking this button moves the record to **BCM Event – Event Closed** state.
BCM: Event - Pull All Related Assets	BCM Manager BCM Analyst	No	Available in the **Crisis Event Reported** and **Crisis Data Gathering** states. Clicking this button pulls all related objects.

Crisis – Plans for Execution Workflow Buttons

The following table lists the buttons available in various states of the baseline Crisis – Plans for Execution workflow.

Button	Available to	Notification	Description
BCM: PE – Start Execution	Crisis Team Member	No	Available in the **Not Started** state. Clicking this button moves the plan exercise to **In Progress** state.
BCM: PE- Plan Execution Completed	Crisis Team Member	Yes	Available in the **In Progress** state. Clicking this button moves the plan exercise to **In Review** state.
BCM: PE - Approved	Crisis Leader	No	Available in the **In Review** state. Clicking this button moves the plan exercise to **Completed** state.
BCM: PE - Redo Plan Execution	Crisis Leader	Yes	Available in the **In Review** state. Clicking this button moves the plan to **In Progress** state.
BCM: PE – Revert to PE Created	BCM Manager BCM Analyst	Yes	Available in the **In Progress**, **In Review** and **Completed** state. Clicking this button moves the plan to **Not Started** state.

Data Import

In Rsam, import maps are used to import data from external sources. For BCM, default import maps have been created for the baseline record categories to import data with none or very minimal configuration in your Rsam instance.

Importing RTO Records

RTO records can be imported using the **BCM: Library – RTO** import map.

Importing RPO Records

RPO records can be imported using the **BCM: Library – RPO** import map.

The following image shows the import maps for the RTO and RPO records.

Appendix 1: BCM Profile Configuration
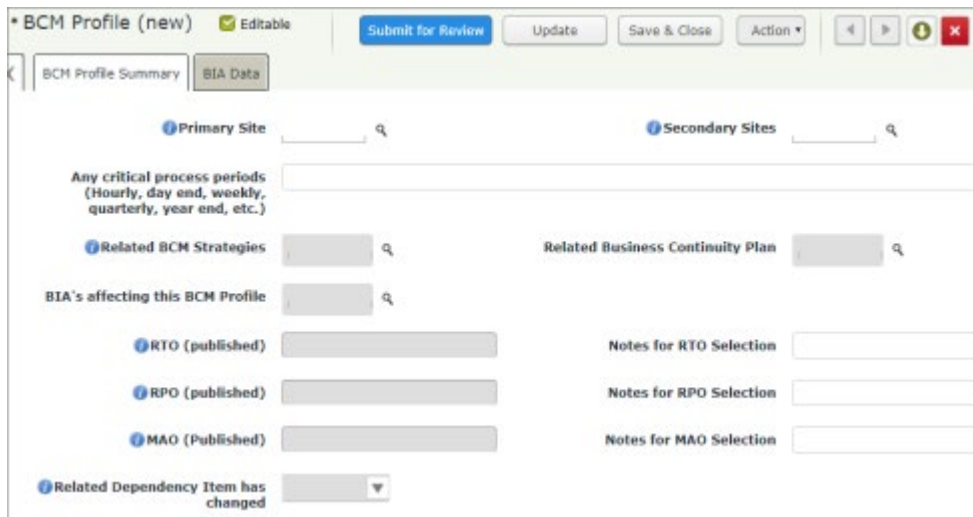
BCM Profile records are directly mapped to an object and it stores all the critical BCM and BIA information summary within it. To include an object in the scope of BCM, a BCM Profile record must be created for the object.

Note: When an Object is created under an Object Type, associated to BCM, a BCM Profile record is auto-created for that Object. For existing customers, who have objects already created before BCM module implementation, corresponding BCM Profile records must be created manually, using the steps mentioned in the following section.

Creating a BCM Profile

To create a BCM profile, perform the following steps:

1. Sign in to Rsam as the *BCM Manager* or *BCM Analyst* user and on the navigation panel on the left, navigate to **Business Continuity Management > BCM Universe**.

2. In Self Registration widget on the right panel, click **Create New BCM Profile**. The page refreshes to show the object list.

3. Click the **Select** link corresponding to the object for which you want to create the BCM Profile. The **BCM Profile (new)** page appears.

4. Provide values for the required fields on the page and click **Save & Close**. The record moves to the **Profile Pending Edits** state.

Object Administrator Generating BCM Profile

An *Object Administrator* can also create BCM Profiles in Rsam. If you are logged in as an Object Administrator, perform the following steps:

1. Navigate to **Objects & Records > Object Navigator**. Select an Object for which BCM Profile should be created.

2. In the top panel, click **Action > Generate BCM Profile**.

3. Double click the Object row to open it. The **Object Details** page opens. The **Categories** section lists the BCM Profile record entry.

4. Click the **BCM Profile (1)** record to view the BCM profile and related attributes. Provide the values and save the record.

# Appendix 2: Specialized Attributes in BCM

The OOTB BCM configuration is designed to meet all the generic BCM requirements of an organization. However, regulations, geographical location, and other factors can enforce some minimum changes to the configuration. This section provides information on special attributes that may be changed thus enabling the administrator include those changes with ease.

Record Types	Attribute Names	Possible Changes & Impact
Process & BIA	BCM: RTO (from BIA) BCM: RTO (from downstream processes) BCM: RTO (override) BCM: RTO (calculated) BCM: RTO (published) BCM: RTO Change (calculated - published) BCM: RTO vs RTC BCM: Plan - Finalized RTO BCM: RPO (from downstream processes) BCM: RPO (override) BCM: RPO (calculated) BCM: RPO (published) BCM: RPO Change (calculated - published) BCM: RPO vs RPC BCM: BIA - RPO BCM: Plan - Finalized RPO BCM: MAO (from BIA)	All these attributes are of type Number, the default units for these attributes are *Hours*. This is defined in the tooltip of these attributes. However, there might be customer organization whose RTO, RPO, etc., values might be measured in minutes. In such cases, update the tooltip to denote unit as *Minutes*.
RTO Tolerance Scenario	Scenario Name, RTO, Impact Parameters and all other related attributes	The scenario duration, their RTO value, impact parameters used for RTO calculation might be change for various customers.
RPO Tolerance Scenario	Scenario Name, RPO, Impact Parameters and all other related attribute	The scenario duration, their RPO value, impact parameters used for RPO calculation might be change for various customers.
BCM Profile	BIA's affecting this BCM Profile	This attribute is reverse linked to the BIA record, the outcome of the linked BIA activity will directly update the RTO, RPO, MAO attributes in a BCM Profile.

Record Types	Attribute Names	Possible Changes & Impact
	Related BCM Strategies Related Business Continuity Plan	This attribute is reverse linked to the related BCM Strategies record. This input is a key in determining the business continuity plan related to the BCM profile. When a Crisis or BCP Testing event is created, the plans for execution are determined by the values populated in these attributes.
Business Continuity Plan	Best Case Execution Time (in Minutes) Worst Case Execution Time (in Minutes) Published RTO for the Object Plan Efficiency Status	The Best Case Execution and Worst Case Execution time attributes help in evaluating the min- max possible time taken for executing the plan. As long as the execution time duration is within the RTO published for the object for which the plan is created, then the plan is considered efficient. For calculation and uniformity purpose the execution time is calculated in minutes, any time unit change to the RTO, RPO, Plan steps execution duration will affect the overall plan efficiency.
Crisis & BCM Tests	Continuity Risk Scenarios Facilities Affected Business Unit & Departments Affected Affected IT Components Affected Business Processes Affected Vendors	These attributes are key in determining the plans for execution to recover the business from crisis. All these attributes are either saved search or list box. Any change to these attributes will impact the logic in auto-determining the plans for execution.

Appendix 3: Offline Decision Making

Rsam email notifications can be configured, including what notification should be sent, what users or roles will receive the notifications, and the content in the notifications. The following image shows an example notification template with custom text, record data, links to the application, and Offline Decision Making.
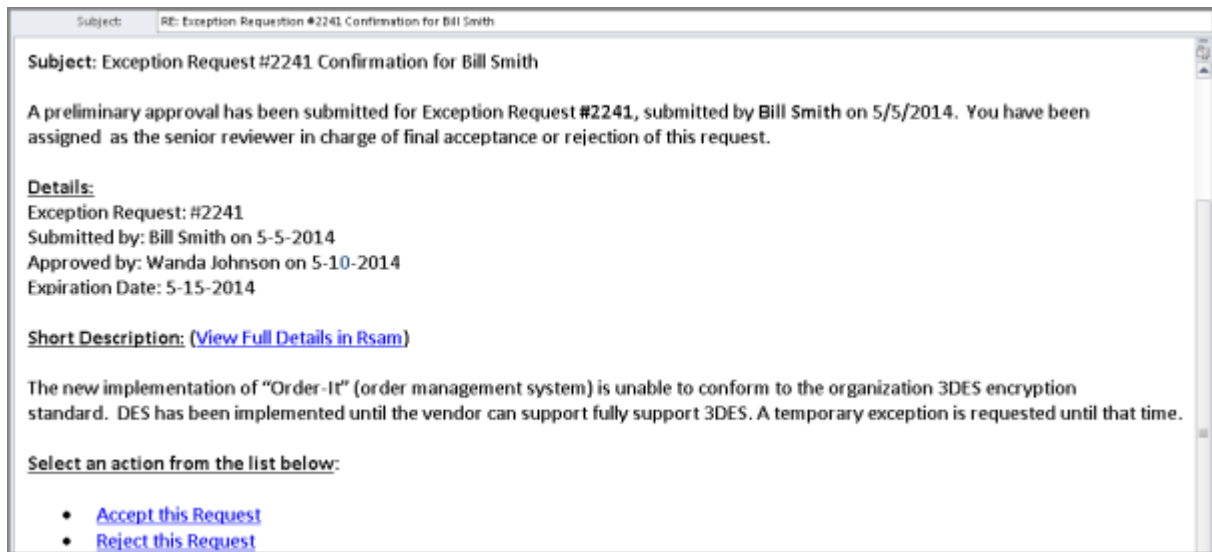

Offline Decision Making provides the Rsam platform directly to users to perform workflow actions without connecting to the Rsam module.

Appendix 4: User Assignment Options

There are many methods by which users can be assigned roles in a workflow (such as who is responsible for reviewing and approving vulnerabilities). The most commonly used assignment methods are as follows:

1. Individual users are assigned to a group. The group is then assigned to the object under which the records are saved. When assigned to the object the group is also granted a specific role. This accomplishes the following:

    a. All users in that group inherit the role assigned to the group in the context of the object and all the records of that object.

    b. All users in that group have permission allocated to that role in the context of the object and all of the records of that object.

2. Individual users are assigned a specific role directly in a record. This provides the same result as above – granting the user the permission with the allocated role. However, it is only in the context of that specific record. No other permissions are granted to the parent object or any other record under that object.

The mechanism for implementing the assignment can also be flexible and customizable. The assignment can be manually made through an attribute, assigned when the records are created or imported, or automatically made at different points in the workflow.
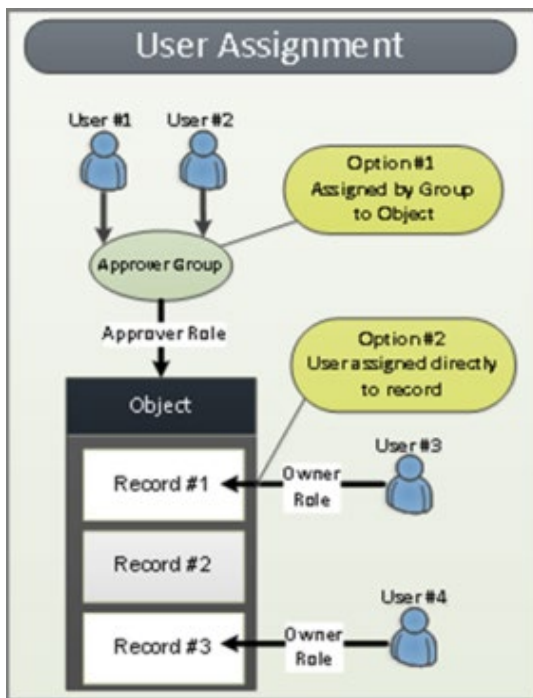
Appendix 5: Rsam Documentation

Business Continuity Management Tutorial

For a detailed walk-through of the BCM user experience, refer the *Business Continuity Management Step-by-Step Tutorial*. You would receive the document along with the Rsam BCM instance. If not, contact your *Rsam Representative* to obtain an electronic copy of the document.

Online Help

This document provides an overview of the BCM module configuration only. For information on specific Rsam features used in this configuration, refer the *End-User Help* or *Administrator Help*. Your access to the online help depends on your user permissions. To access the Online Help, perform the following steps:

1. Sign in to your Rsam instance. For example, sign in as Example Administrator user. Provide the **Username** as *r_admin* and **Password** as *password*.

2. Move the cursor over **Help** and select a help in the menu that appears.

   The following image shows the *Example Administrator* user account in which the user has opened the Rsam Administrator Help.