



# **Business Continuity Management Module**

## **Step-by-Step Tutorial**

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## About Rsam Tutorials

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The Rsam module step-by-step tutorials are designed to help you learn about a specific Rsam module and to gain basic familiarity with the user interface. The Rsam platform is highly configurable and is capable of handling both simple and comprehensive applications. The step-by-step tutorials and Rsam sandboxes, however, are specifically designed to quickly deliver a user experience without requiring further training. Each step-by-step tutorial walks you through common, out-of-the-box functionality within a given Rsam module, allowing you to get immediate hands-on familiarity with the module.

# Rsam Sandbox Environment

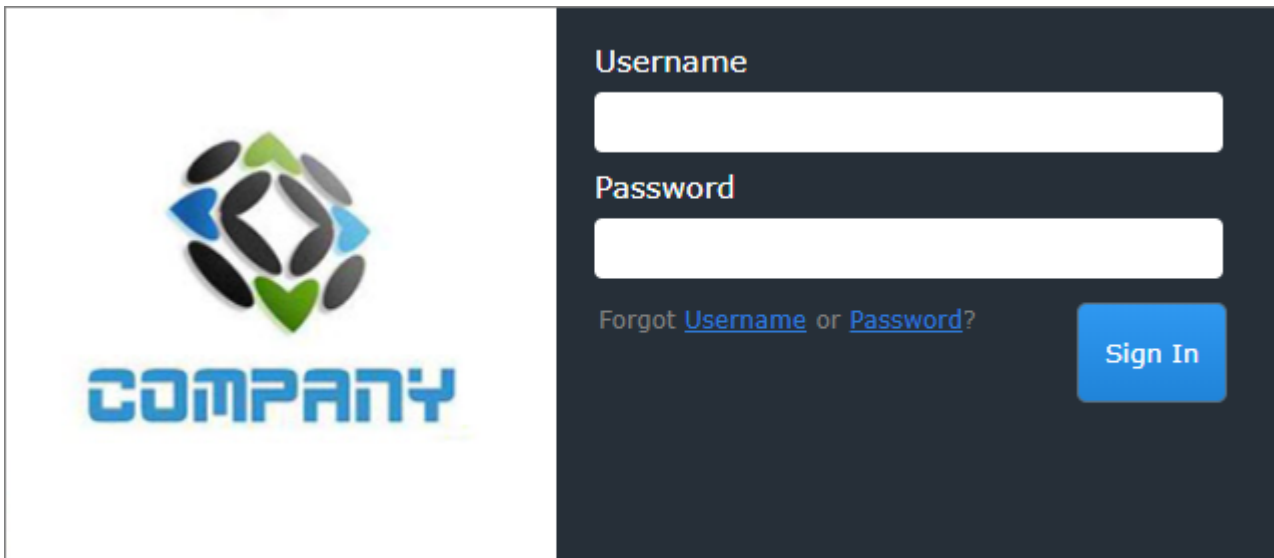
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Rsam module step-by-step tutorials are designed to work with the out-of-the-box Rsam configuration. You may follow this tutorial using an Rsam Sandbox environment or using your own instance of Rsam that you already own. If you are using this tutorial with an Rsam Sandbox environment, the URL to access your Rsam sandbox is delivered through an email. Otherwise, you may contact your Rsam Administrator for the URL to access your Rsam instance.

If you are using an Rsam sandbox environment, you should have provided Rsam with your organization's internet facing IP address. To find this information, open a browser and connect to an IP discovery site such as [www.whatismyip.com](http://www.whatismyip.com), or contact your organization's Network Administrator for assistance. You may also contact your Rsam Customer Representative with any questions.

## Sign-In Page

Tutorials leverage pre-defined accounts that require manual authentication. While your organization may intend to use SSO authentication, Rsam sandbox environments require manual authentication through the Rsam Sign-In page so that you can easily toggle between various sample accounts used throughout the tutorial.



Like most elements in Rsam, the Sign-In page can be configured in a number of ways. Different authentication options such as user self-registration, integration with customer user directories (such as Active Directory), or integration with Single Sign-On products, such as Shibboleth, can be applied. You can also embed your own branding and logo on the Sign-In page.

# Rsam Business Continuity Management

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## Overview

The Rsam Business Continuity Management (BCM) module helps protect the business operations of your organization and minimizes the impact on the business during an emergency or crisis. With Rsam BCM module, you can respond to the unexpected events that can impact the performance of your business and organization's reputation. The BCM module comes with a consistent, scalable, and automated approach to manage the entire lifecycle of business continuity planning, testing, and reporting. It can integrate Business Impact Analysis (BIA), test recovery plan, and crisis management plan, and helps you understand the dependencies (both upstream and downstream) of assets.

## Concepts Used in this Tutorial

The following concepts are used frequently in this tutorial:

- **Recovery Point Objective (RPO)** – Defines the maximum period to which data might be lost in an organization due to a crisis or incident. It can be defined as the period or point of time till which data must be set to be recovered in an event of data loss.
- **Recovery Time Objective (RTO)** – Defines the targeted period in which data and services must be restored in an event of a data loss or disaster. This is the recovery time calculated based on the recovery plans and processes defined.
- **Maximum Acceptable Outage (MAO)** – Defines the maximum period during which the data and services must be restored, after which the organization's business or continuity might be impacted.
- **Upstream Process** – A business process from which output is required for the current process to function.
- **Downstream Process** – A business process which derives values from the current process to function.

## Acronyms Used in this Tutorial

The following table lists the acronyms used in this tutorial.

| Acronym | Expanded Form                  |
|---------|--------------------------------|
| BCM     | Business Continuity Management |
| BCP     | Business Continuity Plan       |
| BIA     | Business Impact Analysis       |
| BPO     | Business Process Owner         |
| MAO     | Maximum Acceptable Outage      |
| RPO     | Recovery Point Objective       |
| RTO     | Recovery Time Objective        |

## Elements in BCM module

The elements that can be involved in the Rsam BCM module are as listed below. While all elements are available, customers can choose to implement only a few, depending on their own BCM needs.

- BCM Profile
- Business Process
- Business Impact Analysis (BIA)
- BCM Strategy
- Business Continuity Plan
- Crisis and Recovery Management
- BCP Test Management

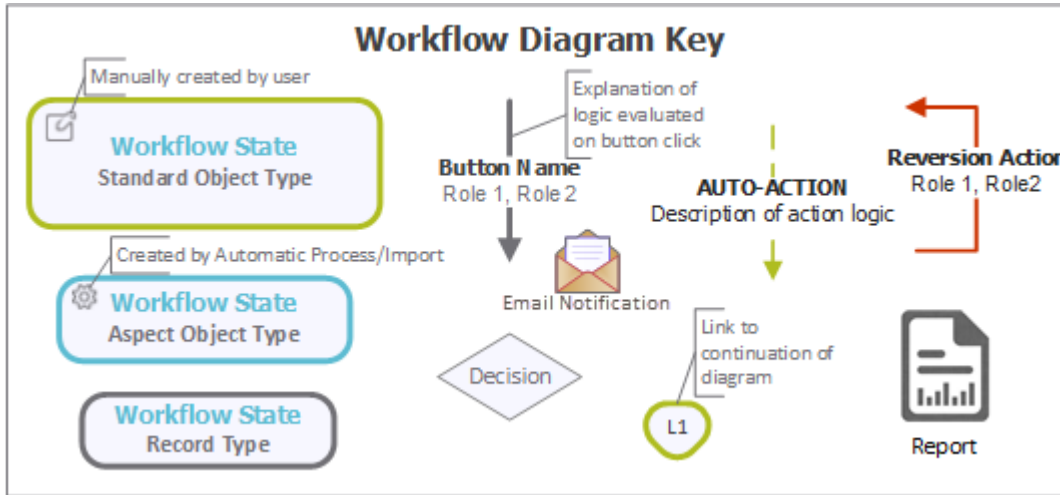
Rsam BCM module provides you a set of pre-configured object types to be used for the configuration. For more information on these out of the box object types, refer the *BCM Baseline Configuration Guide*.

You must create corresponding objects, based on your BCM requirements. To create objects in Rsam, you should be assigned permissions that allow you do so, and can create the objects from the Object Navigator. For information on creating objects, refer the *Rsam Administrator Help*.

## BCM Workflows

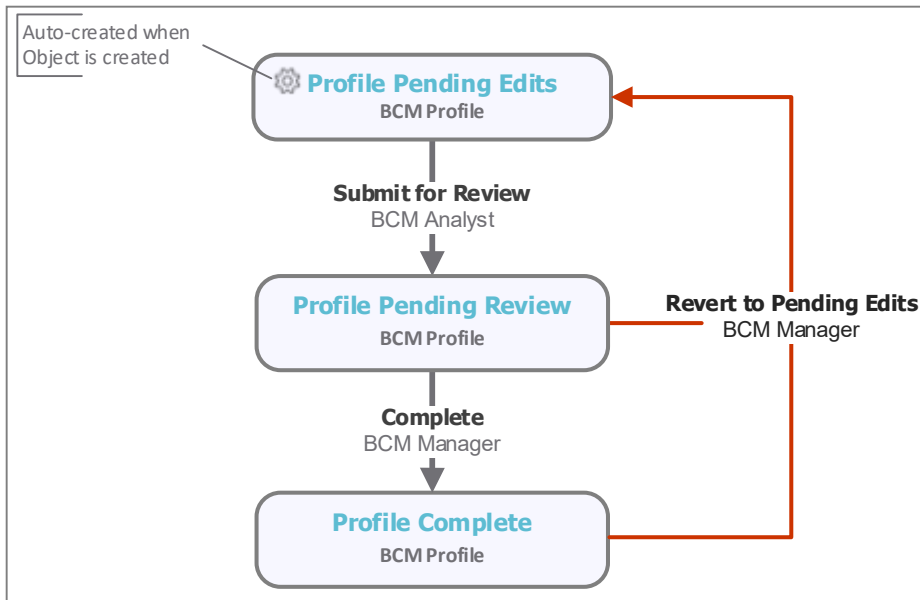
This section covers the workflow diagrams for the BCM elements.

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



## BCM Profile Workflow

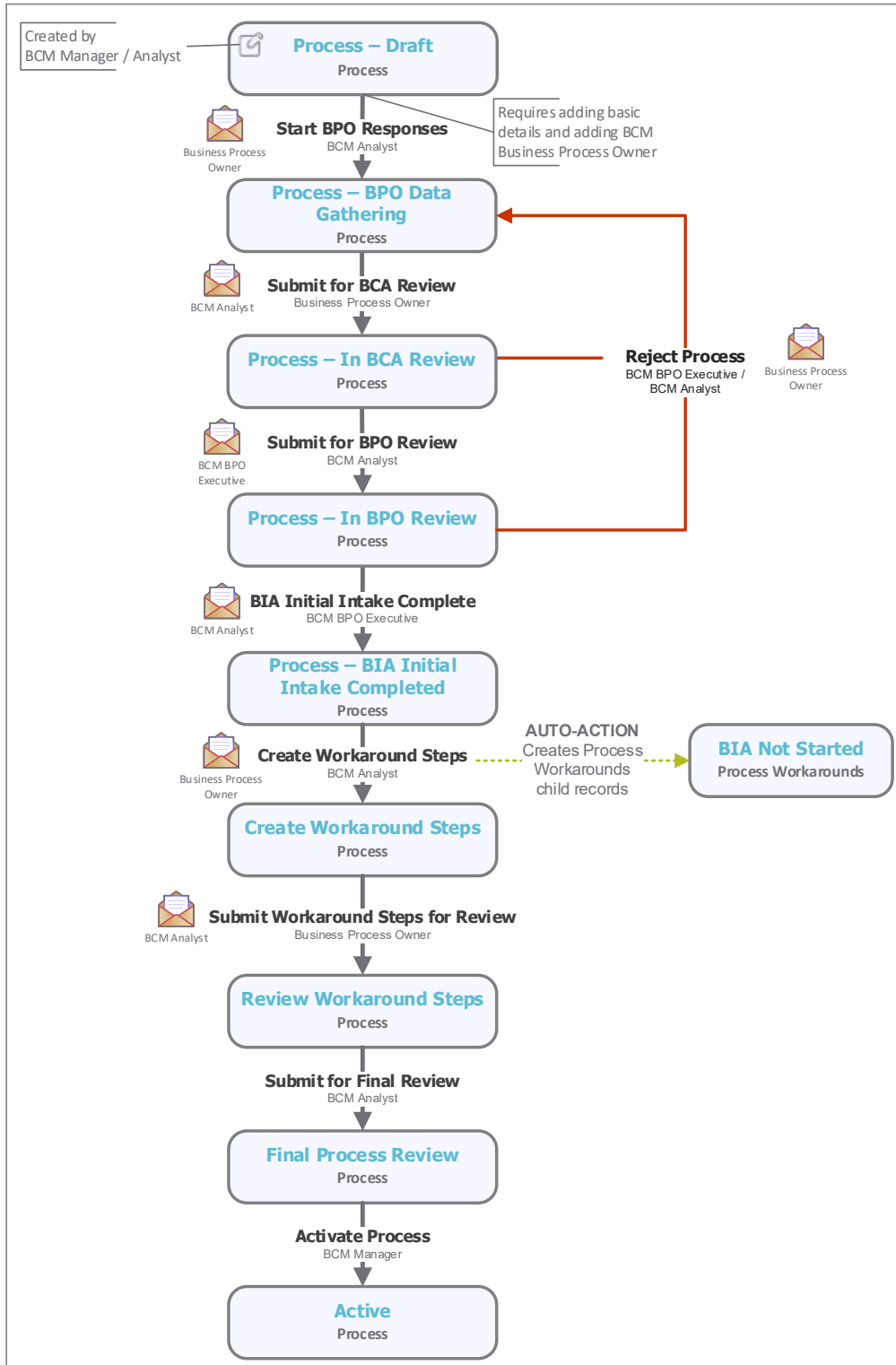
The following diagram represents the BCM Profile workflow.





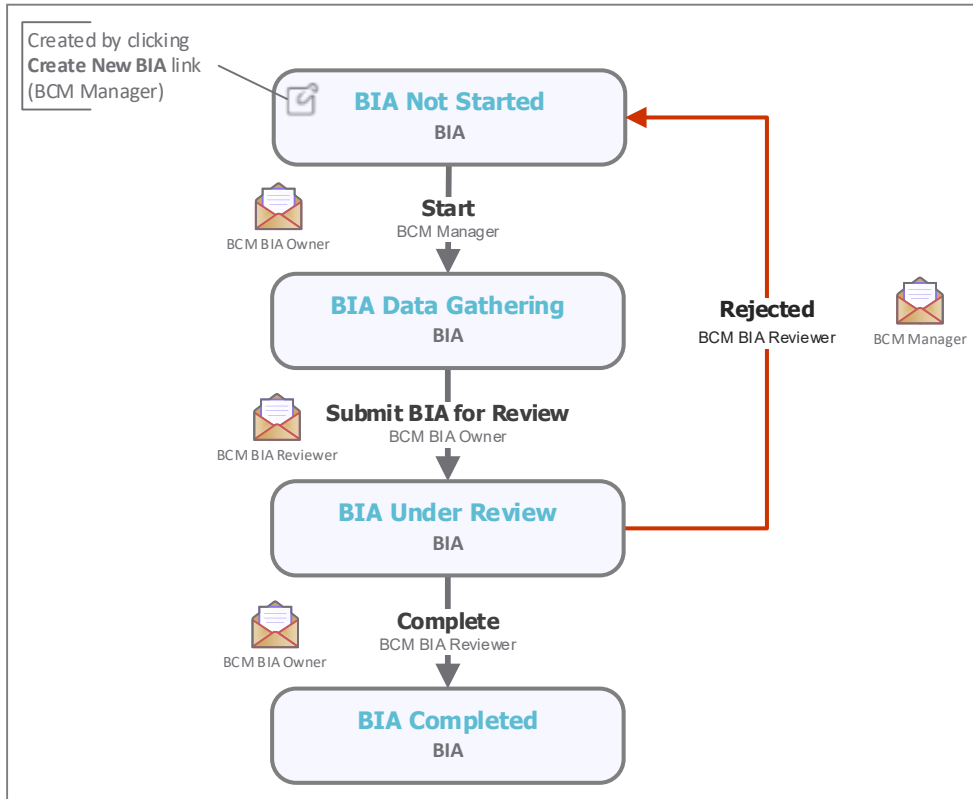
## Process Workflow

The following diagram represents the Process workflow.



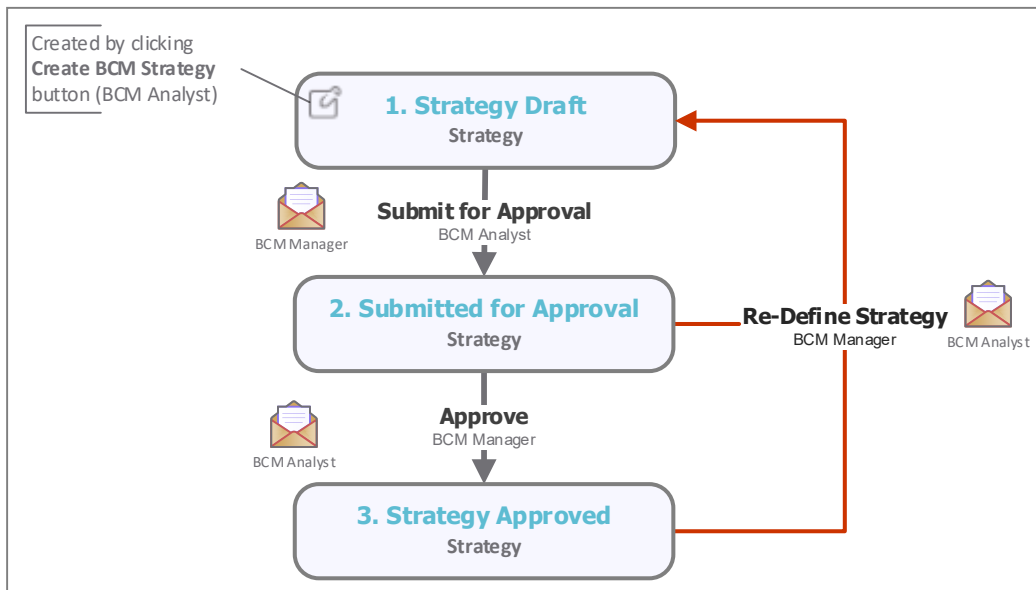
## BIA Workflow

The following diagram represents the BIA workflow.



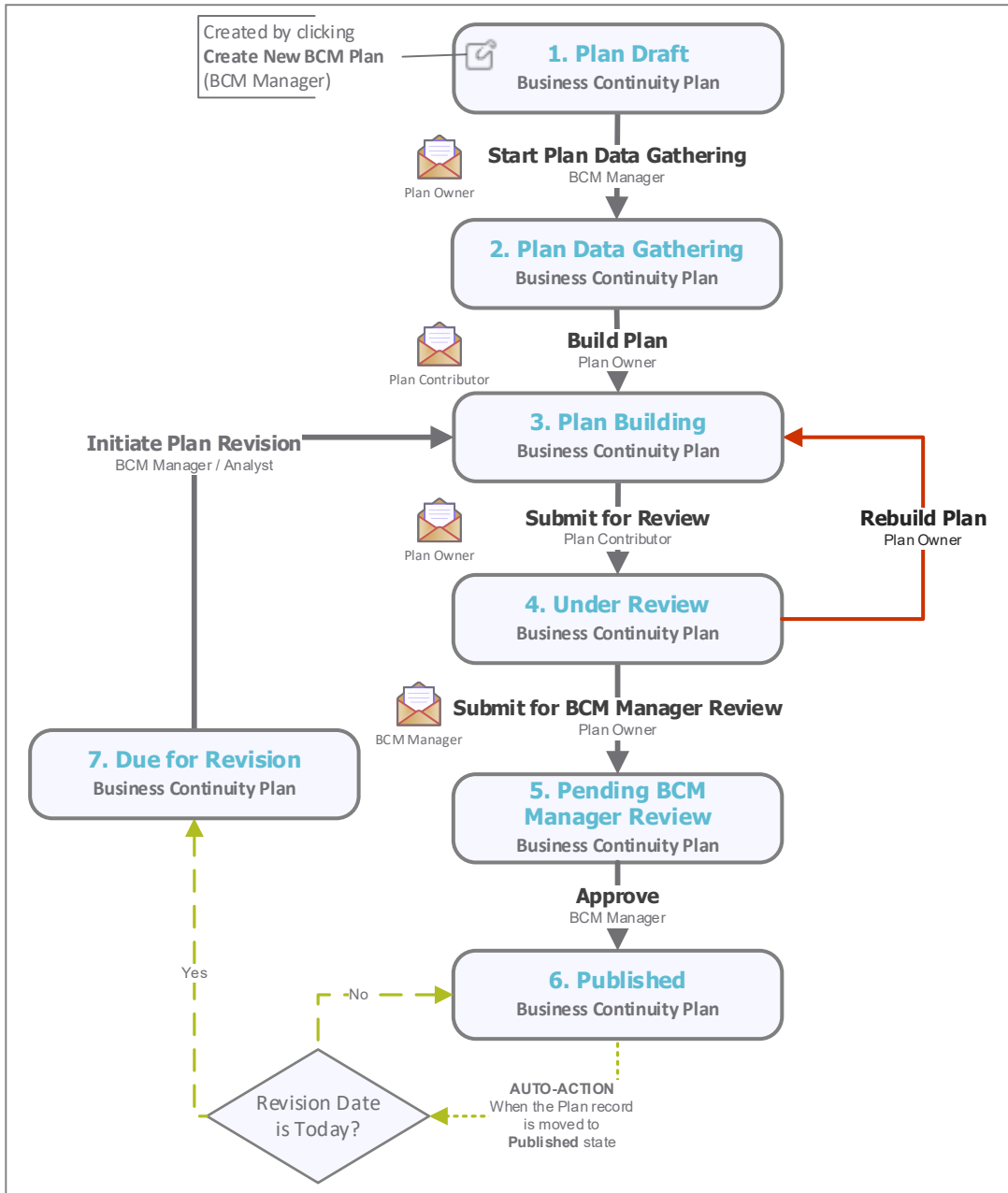
## BCM Strategy Workflow

The following diagram represents the BCM Strategy workflow.



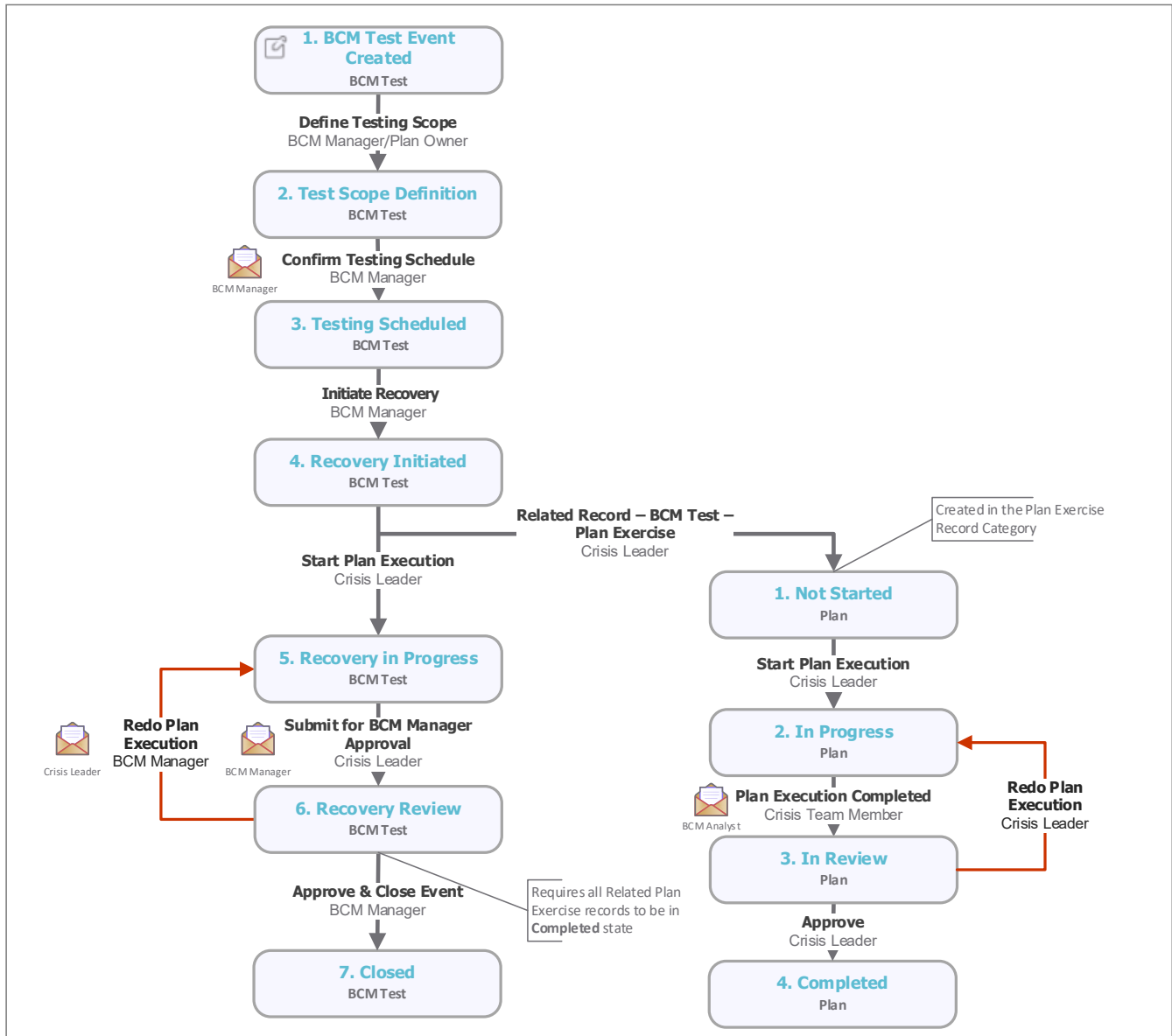
## Plan Workflow

The following diagram represents the BCM Plan workflow.



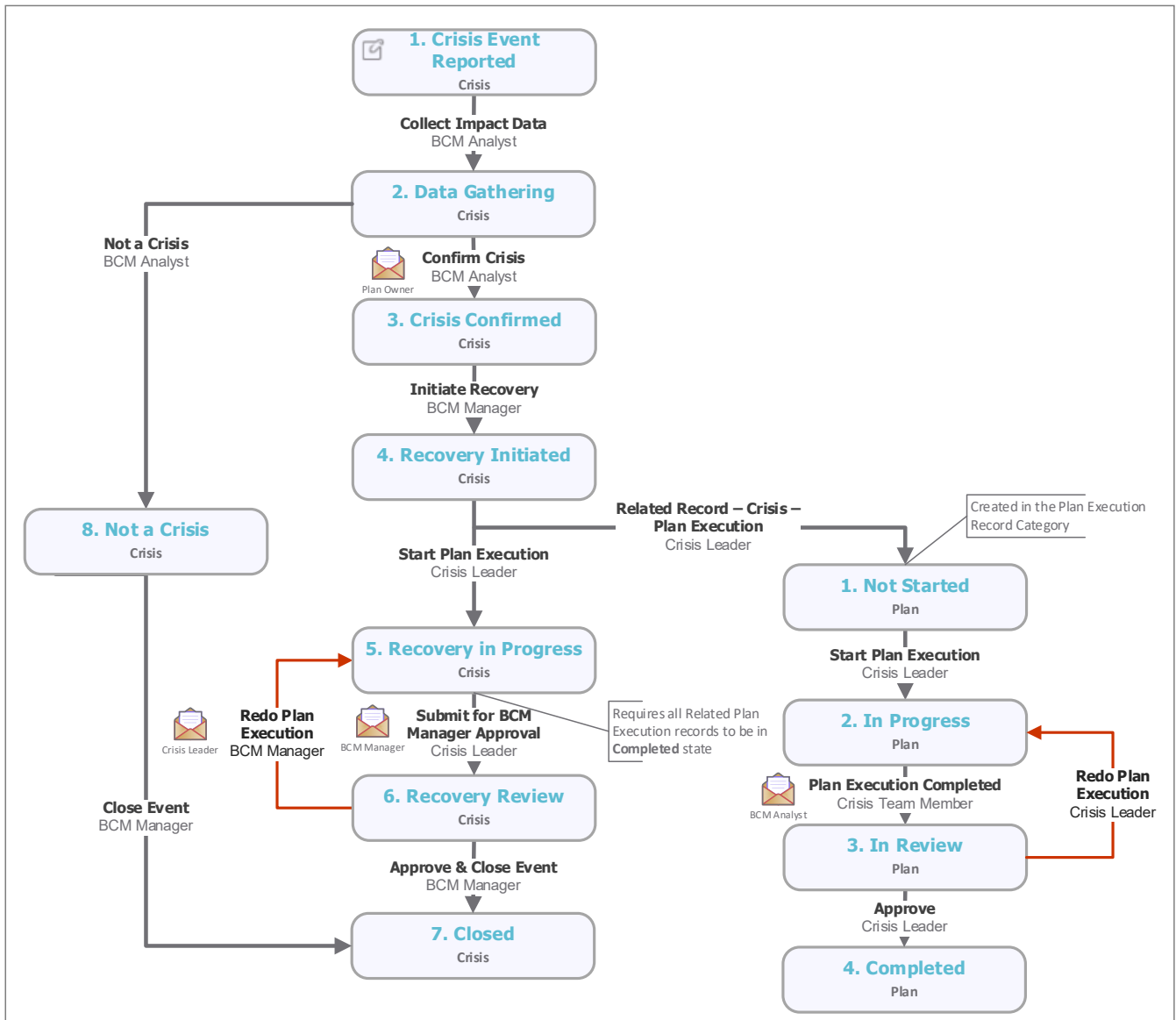
## BCM Tests Workflow

The following diagram represents the BCM Tests workflow.



## Crisis Workflow

The following diagram represents the Crisis workflow.



## User Accounts

User accounts are required for the individuals who are authorized to access Rsam. The Rsam sandbox for BCM comes with pre-populated sample accounts as explained in the following table.

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

| Account ID                    | User                   | Business Responsibilities   |
|-------------------------------|------------------------|---|
| <b>r_bcm_analyst</b>          | BCM Analyst            | This user is responsible for coordinating, building and executing plans, and conducting BIA and BCP testing. Also responsible for reviewing the business processes and any workaround steps and owns the responsibility of activating a business process in Rsam. |
| <b>r_bcm_bpo</b>              | BCM BPO                | This user is responsible for relating upstream and downstream processes, and creating dependencies on assets, such as applications. Can also create workaround steps when an organization is unable to complete the major tasks related to a business process.    |
| <b>r_bcm_bpo_exec</b>         | BCM BPO Executive      | This is the initial user of a BIA.  |
| <b>r_bcm_manager</b>          | BCM Manager            | This user can perform all the tasks applicable to all other user accounts in this module.   |
| <b>r_bcm_bia_owner</b>        | BCM BIA Owner          | This user is responsible for associating a business process to BIA and submitting a BIA for review.   |
| <b>r_bcm_bia_reviewer</b>     | BCM BIA Reviewer       | This user is responsible for reviewing and completing a BIA.  |
| <b>r_bcm_sponsor</b>          | BCM Exercise Sponsor   | This user is responsible for completing an exercise plan and starting an exercise testing. In addition, this user completes the exercise review and exercise recovery.  |
| <b>r_bcm_crisis_leader</b>    | BCM Crisis Leader      | This user is responsible for the entire crisis or BCP testing workflow lifecycle, except the completion of plan execution.  |
| <b>r_bcm_crisis_team</b>      | BCM Crisis Team Member | This user is responsible for the executing the plans associated with a crisis or BCP testing.   |
| <b>r_bcm_plan_owner</b>       | BCM Plan Owner         | This user is responsible for creating and submitting Business Continuity Plans for review.  |
| <b>r_bcm_plan_contributor</b> | BCM Plan Contributor   | This user is responsible for building Business Continuity Plans and its corresponding steps.  |

**Note:** The default password for all accounts in the Rsam BCM sandbox is *password*. Individual users may change their password after authentication. Users with administrator permissions may also reset the password of other users.

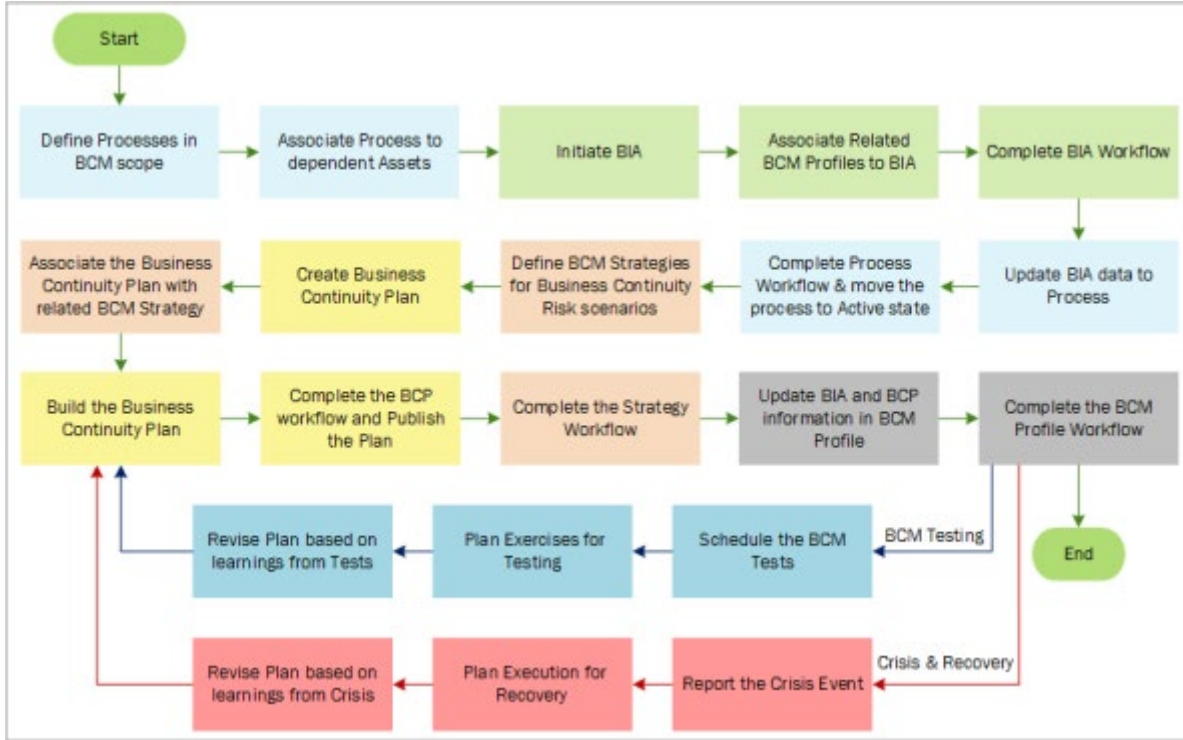
## High-Level Steps

The following is a high-level list of the steps described in this tutorial.

| Step  | User  | Description  |
|---|---|--|
| <a href="#">Step 1: Configuring Business Process</a>        | BCM Manager<br>Business Process Owner<br>BCM Analyst          | In this step, the Business Process is created and submitted for review.                                    |
| <a href="#">Step 2: Conducting Business Impact Analysis</a> | BCM Manager<br>BIA Owner<br>BIA Reviewer                      | In this step, a BIA record is created, scope is added, and submitted for review.                           |
| <a href="#">Step 3: Defining BCM Strategy</a>               | BCM Manager<br>BCM Analyst                                    | In this step, a BCM strategy is created and submitted for review.  |
| <a href="#">Step 4: Developing Business Continuity Plan</a> | BCM Manager<br>BCM Plan Owner<br>BCM Plan Contributor         | In this step, the BCM Plan is created and submitted. After approval an Execution or Exercise is generated. |
| <a href="#">Step 5: Managing Crisis and Recovery</a>        | BCM Manager<br>BCM Analyst<br>BCM Plan Owner<br>Crisis Leader | In this step, a crisis event is reported and managed.  |
| <a href="#">Step 6: Conducting BCM Tests</a>                | BCM Manager<br>BCM Analyst<br>BCM Plan Owner<br>Crisis Leader | In this step, a BCM Test plan is created and managed.  |
| <a href="#">Step 7: Executing BCM Plan Exercise</a>         | Crisis Leader<br>BCM Crisis Team Member                       | In this step, a Plan Exercise is created to test the efficiency of the BCM Plans.                          |

# Overview of Tutorial Steps

The following is a high-level list of the steps we will follow in this step-by-step tutorial.





# Business Process Configuration

Business Processes are a set of activities that are directly related to the revenue generated or the business objectives of the organization. Assets for the objects will be used by the business process to perform the related activities/tasks. The tasks involved are as follows:

1. [Creating and Submitting a Business Process](#)
2. [Adding Business Process Tasks and Other Attributes](#)

## Step 1: Creating and Submitting a Business Process

To create a business process, perform the following steps:

1. Sign in to Rsam as the *BCM Manager (r\_bcm\_manager)* or *BCM Analyst (r\_bcm\_analyst)* user.
2. On the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
3. On the right panel, under **Create Process**, click **Create New Process** link. The **Process (new)** record opens with the **Process** tab selected.

\* Process (new) Editable Start BRO Responses Update Save & Close Action

Process Process Dependencies Other Dependencies Workarounds BIA Signatures

\* Process Name Process Owner

Process Description

Process Task Refresh Add Open Delete Assign Action

No Data

Process Diagram File Attachments Business Criticality

Skill sets required to perform the Business Process Resources Required for the Business Process

Normal Working Hours Peak Time

Number of people required to perform the business process during normal working hours Minimum number of people required to perform the business process during crisis scenario

Other Remarks

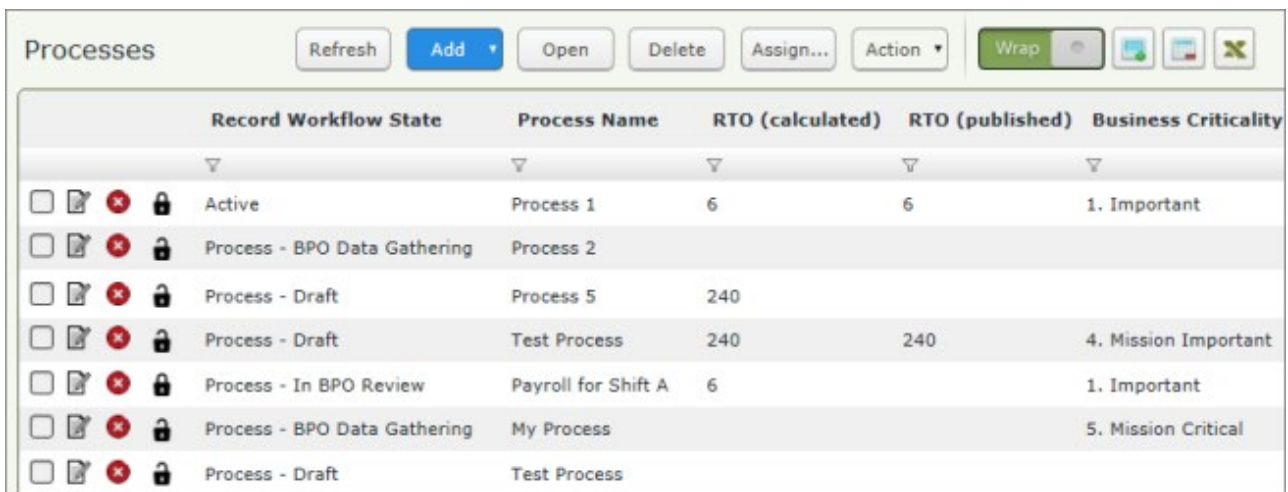
Entered By r\_bcm\_manager

4. Provide a name for the process in the **Process Name** field.  
Use a name that is commonly used to refer the process in the organization.
5. In the **Process Description** field, provide detailed information about the process.
6. Select **BCM BPO (r\_bcm\_bpo)** as the process owner in the **Process Owner** field.
7. Click **Start BPO Responses**. The process record moves to the **Process - BPO Data Gathering** state.

## Step 2: Adding Business Process Tasks and Other Attributes

Business Process Tasks are child records associated to the Process. These tasks store the list of task / activities that must be performed for the business process. To add business process tasks and other details for the business process, perform the following steps:

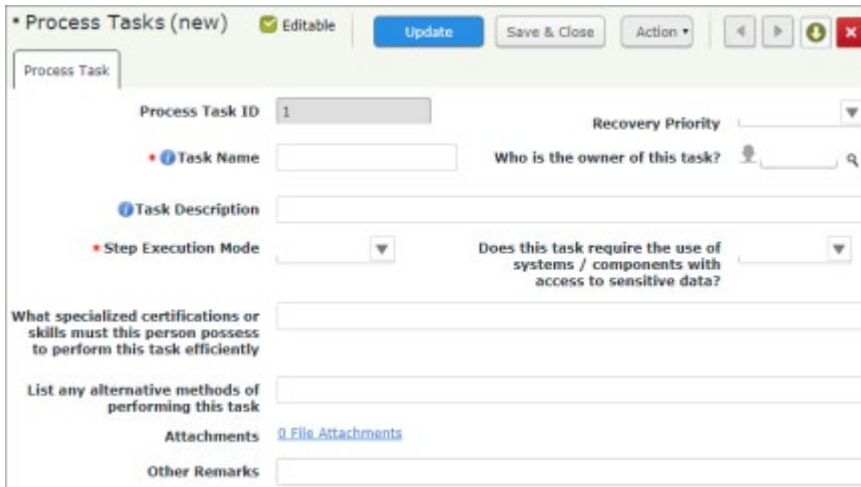
1. Sign in to Rsam as the *Business Process Owner (r\_bcm\_bpo)* user and on the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click the **Processes** link. The **Processes** grid appears.



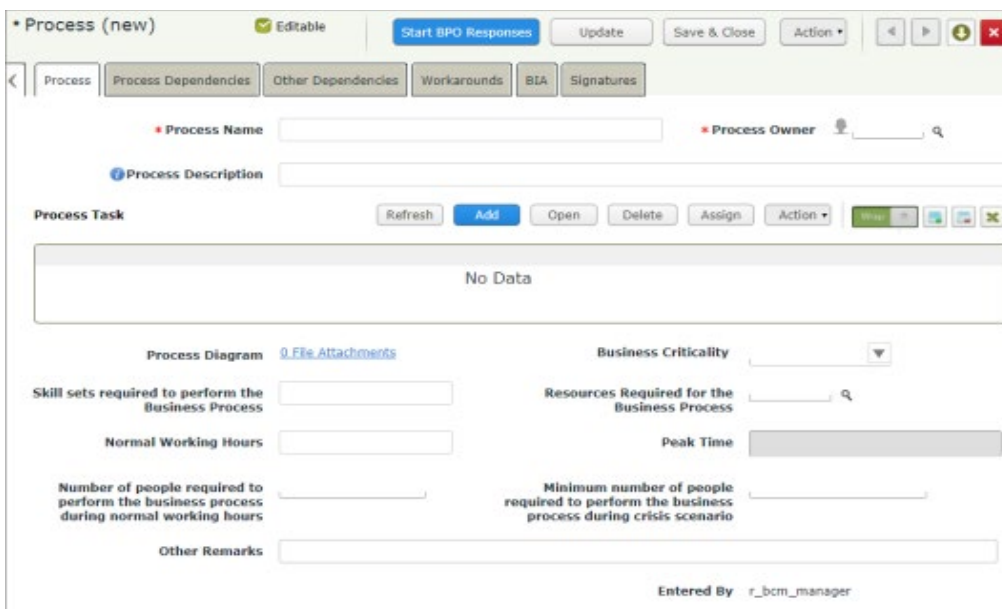
| Record                   | Workflow State               | Process Name        | RTO (calculated) | RTO (published) | Business Criticality |
|--------------------------|------------------------------|---------------------|------------------|-----------------|----------------------|
| <input type="checkbox"/> | Active                       | Process 1           | 6                | 6               | 1. Important         |
| <input type="checkbox"/> | Process - BPO Data Gathering | Process 2           |                  |                 |                      |
| <input type="checkbox"/> | Process - Draft              | Process 5           | 240              |                 |                      |
| <input type="checkbox"/> | Process - Draft              | Test Process        | 240              | 240             | 4. Mission Important |
| <input type="checkbox"/> | Process - In BPO Review      | Payroll for Shift A | 6                |                 | 1. Important         |
| <input type="checkbox"/> | Process - BPO Data Gathering | My Process          |                  |                 | 5. Mission Critical  |
| <input type="checkbox"/> | Process - Draft              | Test Process        |                  |                 |                      |

3. Locate the process record created in [Creating and Submitting a Business Process](#) and double-click the process record.  
The **Process** record opens with the **Process** tab selected.

4. Click **Add > Process Tasks** to add process tasks. The **Process Tasks (new)** page appears.

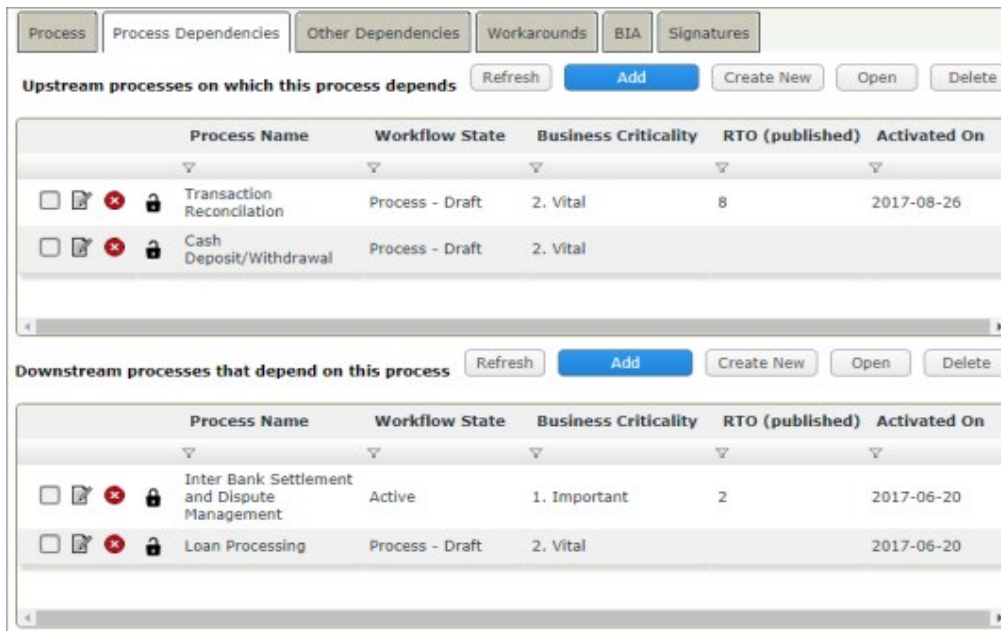


- a. Provide the required values for the fields available on the page and click **Save & Close**.
  - b. Add more Process Tasks as required.
5. Provide values for the other fields in the **Process** tab.

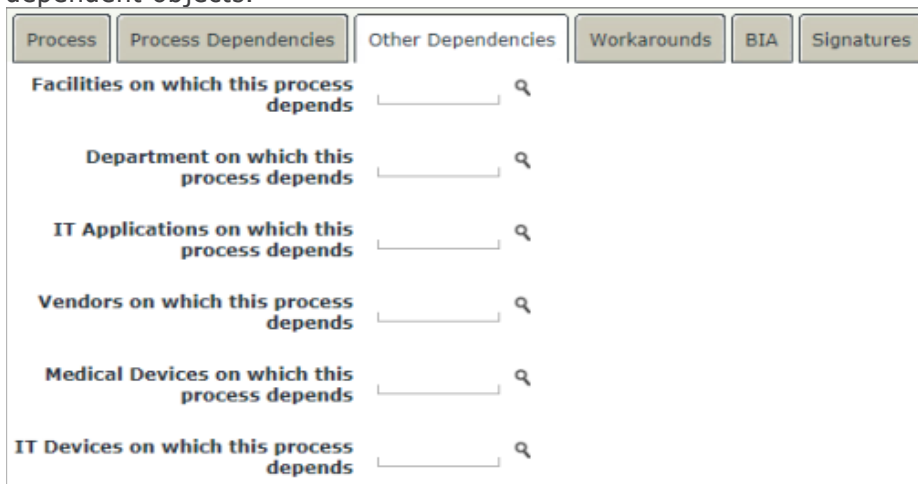


6. Click the **Process Dependencies** tab.
  - a. To add Upstream processes, click **Add** corresponding to the Upstream processes grid. The **Upstream processes on which this process depends** dialog appears.
  - b. Select the checkbox corresponding to the required Upstream process, and click **Update**. The upstream process is added as a dependent on the process being created.

- c. To add downstream processes, click **Add** corresponding to the Downstream processes grid.  
The **Downstream processes that depend on this process** dialog appears.
- d. Select the checkbox corresponding to the required Downstream process, and click **Update**.  
The downstream process is added as a dependent on the process being created.



- 7. Click **Other Dependencies** tab and add values for the objects that are related to the process.  
**Example:** Process A uses a Software application, ABC, to perform the process related tasks. ABC is hosted on a server. Then, for the process, ABC application and the Server are the dependent objects.



- 8. Click **Submit for BCA Review**.  
The process record moves to the **Process - In BCA Review** state.

# Business Impact Analysis


The BIA records are used to capture business impact values and populate the RTO, RPO, and MAO values of a process or objects (BCM profile). The tasks involved are as follows:

1. [Creating a BIA Record](#)
2. [Adding Data for BIA and Submitting for Review](#)
3. [Reviewing and Completing the BIA](#)

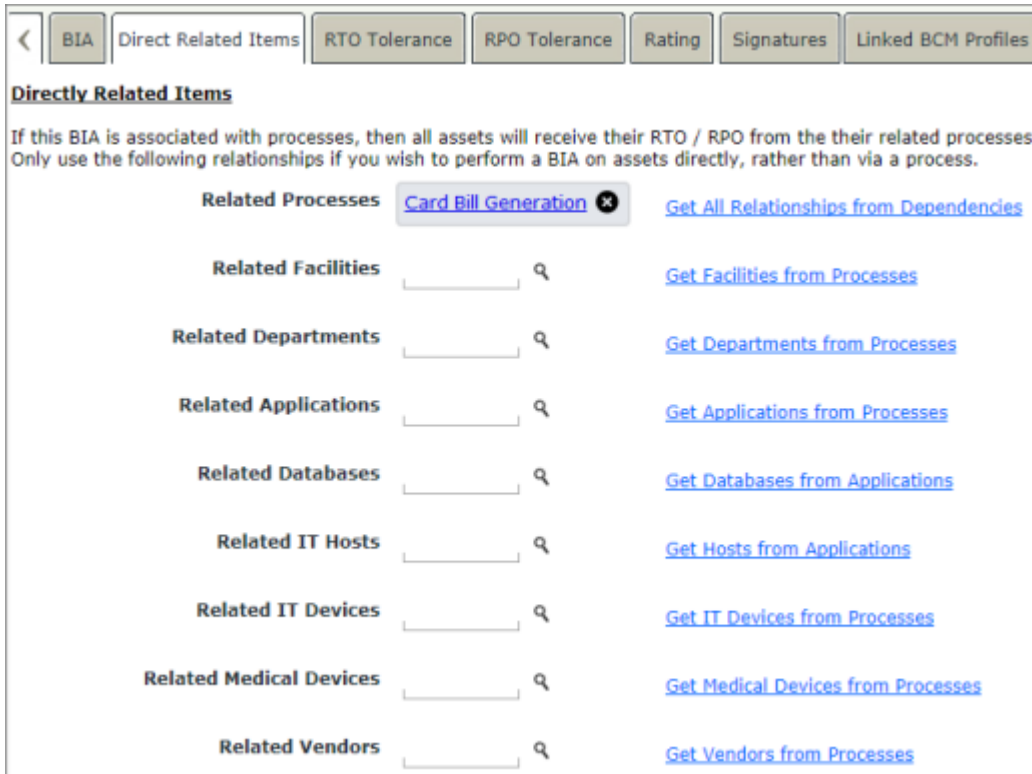
## Step 1: Creating a BIA Record

To create a BIA record, perform the following steps:

1. Sign in to Rsam as the *BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Create BIA**, click the **Create New BIA** link. The **BIA (new) record** opens with the **BIA** tab selected.
3. On the **BIA** tab, provide values for the **BIA Name**, **BIA Description**, **BIA Owner**, and **Related Processes** fields.

4. To add related processes, perform the following steps:
  - a. Click the  icon corresponding to the **Related Processes** field. The **Related Processes** dialog appears.

- b. Select the check box corresponding to the required process created. For information on creating Business Processes, see [Creating and Submitting a Business Process](#).
  - c. Click **Update**.
5. Select the user **BIA Owner (r\_bcm\_bia\_owner)** in the **BIA Owner** field.
  6. Click **Directly Related Items** tab and then click **Get All Relationships from Dependencies** to pull the objects associated to the process chosen in the previous step.



**Directly Related Items**

If this BIA is associated with processes, then all assets will receive their RTO / RPO from the their related processes. Only use the following relationships if you wish to perform a BIA on assets directly, rather than via a process.

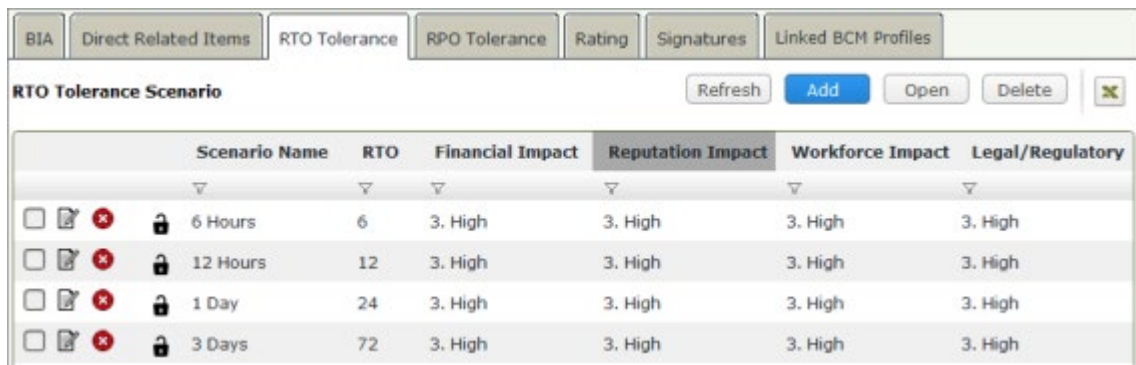
|                                |   |   |
|--------------------------------|---|---|
| <b>Related Processes</b>       | <input type="text" value="Card Bill Generation"/> | <a href="#">Get All Relationships from Dependencies</a> |
| <b>Related Facilities</b>      | <input type="text"/>                              | <a href="#">Get Facilities from Processes</a>           |
| <b>Related Departments</b>     | <input type="text"/>                              | <a href="#">Get Departments from Processes</a>          |
| <b>Related Applications</b>    | <input type="text"/>                              | <a href="#">Get Applications from Processes</a>         |
| <b>Related Databases</b>       | <input type="text"/>                              | <a href="#">Get Databases from Applications</a>         |
| <b>Related IT Hosts</b>        | <input type="text"/>                              | <a href="#">Get Hosts from Applications</a>             |
| <b>Related IT Devices</b>      | <input type="text"/>                              | <a href="#">Get IT Devices from Processes</a>           |
| <b>Related Medical Devices</b> | <input type="text"/>                              | <a href="#">Get Medical Devices from Processes</a>      |
| <b>Related Vendors</b>         | <input type="text"/>                              | <a href="#">Get Vendors from Processes</a>              |

7. Click **Linked BCM Profiles** tab, and associate the BCM profiles for the assets that should be updated with the BIA data.
8. Click **Start**. The BIA record moves to the **BIA Data Gathering** state.

## Step 2: Adding Data for BIA and Submitting for Review

To add data for the BIA record and submit it for review, perform the following steps:

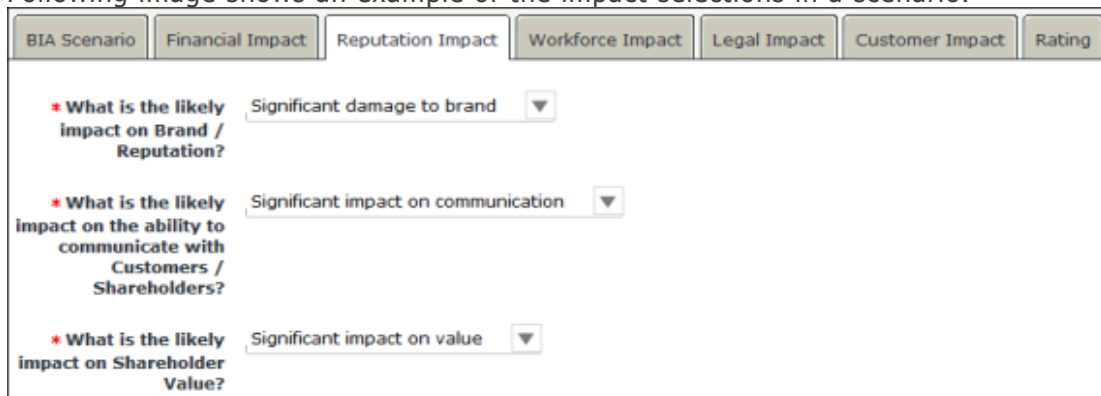
1. Sign in as the *BCM BIA Owner (r\_bcm\_bia\_owner)* user and on the navigation panel on the left, navigate to **Business Continuity Management > Process& BIA**.
2. On the right panel, under **Business Impact Analysis (BIA)**, click the **BIA** link. The **BIA** grid appears.
3. Locate the required BIA record and double-click to open it. The **BIA** record opens with the **BIA** tab selected.
4. Click the **RTO Tolerance** tab and perform the following steps:
  - a. Double-click a scenario, for example 6 Hours.



|                          |  | Scenario Name | RTO | Financial Impact | Reputation Impact | Workforce Impact | Legal/Regulatory |
|--------------------------|--|---------------|-----|------------------|-------------------|------------------|------------------|
| <input type="checkbox"/> |  | 6 Hours       | 6   | 3. High          | 3. High           | 3. High          | 3. High          |
| <input type="checkbox"/> |  | 12 Hours      | 12  | 3. High          | 3. High           | 3. High          | 3. High          |
| <input type="checkbox"/> |  | 1 Day         | 24  | 3. High          | 3. High           | 3. High          | 3. High          |
| <input type="checkbox"/> |  | 3 Days        | 72  | 3. High          | 3. High           | 3. High          | 3. High          |

The **RTO Tolerance Scenario** record opens with the **BIA Scenario** tab selected.



- b. Click the **Financial Impact** tab and select the impact on revenue from the drop down available in the **What is the likely impact on Revenue** field.
- c. Click the **Reputation Impact** tab and select the impact for each reputation aspect. Following image shows an example of the impact selections in a scenario.



| BIA Scenario  | Financial Impact | Reputation Impact | Workforce Impact | Legal Impact | Customer Impact | Rating |
|---|------------------|-------------------|------------------|--------------|-----------------|--------|
| <p>* What is the likely impact on Brand / Reputation? <span>Significant damage to brand</span></p> <p>* What is the likely impact on the ability to communicate with Customers / Shareholders? <span>Significant impact on communication</span></p> <p>* What is the likely impact on Shareholder Value? <span>Significant impact on value</span></p> |                  |                   |                  |              |                 |        |

- d. Select values for fields available in the **Workforce Impact**, **Legal Impact**, and **Customer Impact** tabs.
- e. Click **Calculate BIA Ratings**. The ratings are calculated and populated to the fields on the Rating tab.
- f. Click the **Rating** tab to view the ratings calculated.

| BIA Scenario | Financial Impact               | Reputation Impact | Workforce Impact | Legal Impact | Customer Impact | Rating      |
|--------------|--------------------------------|-------------------|------------------|--------------|-----------------|-------------|
|              | <b>Financial Impact</b>        | 2. Moderate       | 2. Moderate      | 2. Moderate  | 2. Moderate     | 2. Moderate |
|              | <b>Reputation Impact</b>       | 2. Moderate       | 2. Moderate      | 2. Moderate  | 2. Moderate     | 2. Moderate |
|              | <b>Workforce Impact</b>        | 2. Moderate       | 2. Moderate      | 2. Moderate  | 2. Moderate     | 2. Moderate |
|              | <b>Legal/Regulatory Impact</b> | 2. Moderate       | 2. Moderate      | 2. Moderate  | 2. Moderate     | 2. Moderate |
|              | <b>Customer Impact</b>         | 3. High           | 3. High          | 3. High      | 3. High         | 3. High     |

- g. Click  to close the RTO Tolerance Scenario record.
  - h. Repeat steps *a* through *g* for the remaining RTO tolerance scenarios.
5. Click the **RPO Tolerance** tab.
    - a. Double-click a scenario.  
The **RPO Tolerance Scenario** record opens with the **BIA Scenario** tab selected.
    - b. Click the **Financial Impact** tab, and select the impact on revenue from the drop down available in the **What is the likely impact on Revenue** field.
    - c. Click the **Reputation Impact** tab and select the impact for each reputation aspect.
    - d. Select values for fields available in the **Workforce Impact**, **Legal Impact**, and **Customer Impact** tabs.
    - e. Click **Calculate BIA Ratings**.
    - f. Click the **Rating** tab to view the ratings calculated.
    - g. Click  to close the RPO Tolerance Scenario record.
    - h. Repeat steps *a* through *g* for the remaining RPO tolerance scenarios.
  6. Click **Submit BIA for Review**.  
The BIA record moves to the **BIA Under Review** state.



### Step 3: Reviewing and Completing the BIA

To review and complete the BIA, perform the following steps:

1. Sign in as the *BCM BIA Reviewer* (*r\_bcm\_bia\_reviewer*) user.
2. On the navigation panel on the left, navigate to **Business Continuity Management > Process & BIA**.
3. On the right panel, under **Business Impact Analysis (BIA)**, click the **BIA** link.  
The page refreshes to show the **BIA** records.
4. Locate the required BIA record and double-click to open it.  
The **BIA** record opens with the **BIA** tab selected.
5. Review the attributes and click **Complete**.  
The BIA record moves to the **BIA Completed** state.

# Update and Activate Business Process

---

BIA records are mapped to the related Business Process records. The Process records must then be updated with the BIA results and the processes must be activated in the system.

The tasks involved are as follows:

1. [Reviewing Business Process – BCM Analyst](#)
2. [Updating Business Process with BIA Results](#)
3. [Submitting Business Process for Workaround Steps Creation](#)
4. [Create and Submit Workaround Steps for Review](#)
5. [Reviewing the Workaround Steps](#)
6. [Activating the Business Process](#)

## Step 1: Reviewing Business Process – BCM Analyst

A BCM Analyst user must review the process record. To review the process, perform the following steps:

1. Sign in to Rsam as the *BCM Analyst (r\_bcm\_analyst)* user and on the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click the **Processes** link.  
The **Processes** grid appears.
3. Locate the process record to be reviewed and double-click the record to open it.  
The **Process** record opens with the **Process** tab selected.
4. Review the record information and ensure that the BPO user has provided valid values for all the required attributes.
5. Click the **BIA** tab and ensure that the **Related BIA** field has at least one associated BIA record.  
For more information on BIA, see [Creating a BIA Record](#).
6. After validating all the data, click **Submit for BPO Review**. The process moves to the **Process - In BPO Review** state.

## Step 2: Updating Business Process with BIA Results

A BCM BPO Executive user can update the Business Process record with the BIA results.

### Pre-requisite:

In a Business Process record, the **Related BIA** field shows the BIA record that is associated with the Process. The Business Process should be associated with at least one BIA record to move to **BIA Initial Intake Completed** state.

To update the business process with BIA results, perform the following steps:

1. Sign in to Rsam as the *BCM BPO Executive* (*r\_bcm\_bpo\_exec*) user and on the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click the **Processes** link.  
The **Processes** grid appears.
3. Locate the required process record and double-click the record to open it.  
The **Process** record opens with the **Process** tab selected.
4. Click **Action > Update RTO/RPO/MAO**. This action pulls the latest RTO/RPO/MAO data from the related BIA record and updates the values in the **BIA** tab.
5. Click **BIA Initial Intake Complete**. The record moves to the **Process - BIA Initial Intake Completed** state.

## Step 3: Submitting Business Process for Workaround Steps Creation

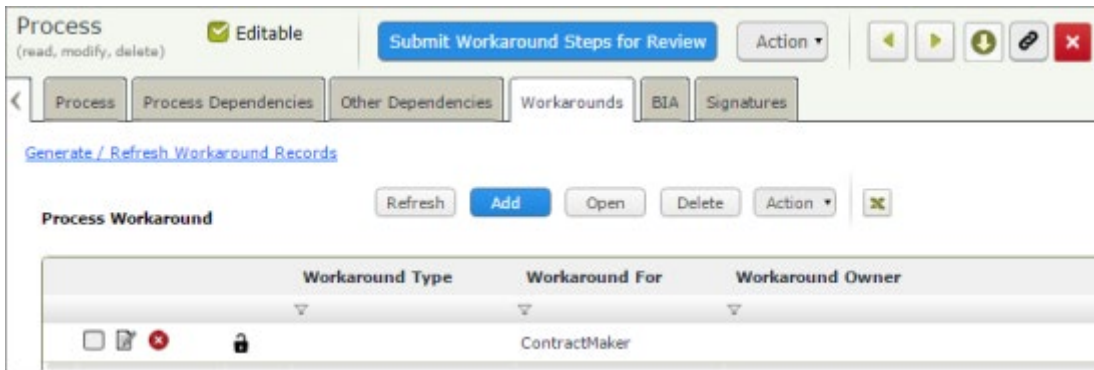
To submit the process for creating workaround steps, perform the following steps:

1. Sign in as the *BCM Analyst* (*r\_bcm\_analyst*) user and on the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click **Processes** link.  
The **Processes** grid appears.
3. Locate the required process record and double-click the record to open it.  
The **Process** record opens with the **Process** tab selected.
4. Click **Create Workaround Steps**. A message appears stating that the workflow will generate or update workaround records and whether you want to continue.
5. Click **OK** to continue.  
The process moves to the **Create Workaround Steps** state.

## Step 4: Create and Submit Workaround Steps for Review

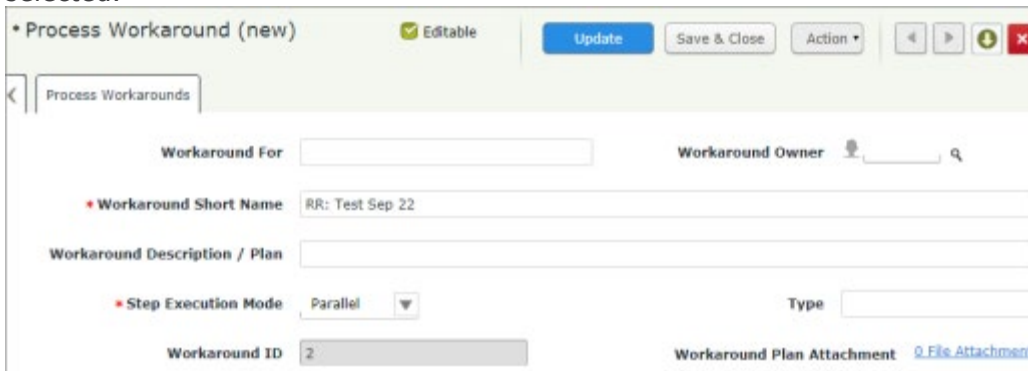
To create and submit the workaround steps for review, perform the following steps:

1. Sign in as the *BCM BPO (r\_bcm\_bpo)* user and on the navigation panel on the left side, navigate to **Business Continuity Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click **Processes** link.  
The **Processes** grid appears.
3. Locate the required process record and double-click the record to open it.  
The **Process** record opens with the **Process** tab selected.
4. Click the **Workarounds** tab.



5. Click **Add > Process Workarounds**.

The **Process Workarounds (new)** page appears with the **Process Workarounds** tab selected.



The screenshot shows the 'Process Workaround (new)' form. The page title is 'Process Workaround (new)' and it is marked as 'Editable'. There is an 'Update' button, a 'Save & Close' button, and an 'Action' dropdown menu. The form has several fields: 'Workaround For' (text input), 'Workaround Owner' (user selection), 'Workaround Short Name' (text input, value: 'RR: Test Sep 22'), 'Workaround Description / Plan' (text input), 'Step Execution Mode' (dropdown menu, value: 'Parallel'), 'Type' (text input), and 'Workaround ID' (text input, value: '2'). There is also a 'Workaround Plan Attachment' link labeled 'File Attachments'.

- a. Provide values for the required fields.
  - b. Select whether to execute the step in parallel or sequentially in the **Step Execution Mode** field.
  - c. Click **Save & Close**.
6. Click **Submit Workaround Steps for Review**.  
The process record moves to the **Review Workaround Steps** state.

## Step 5: Reviewing the Workaround Steps

To review the workaround steps and submit it for review, perform the following steps:

1. Sign in as the *BCM Analyst (r\_bcm\_analyst)* user and on the navigation panel on the left side, navigate to **Business Continuity Management > Process & BIA**.
2. On the right panel, under **Processes**, click **Processes** link. The **Processes** grid appears.
3. Locate the required process record and double-click the record to open it. The **Process** record opens.
4. Review all the field values and click **Submit for Final Review**. The process moves to the **Final Process Review** state.

## Step 6: Activating the Business Process

To activate the Business process after the final review, perform the following steps:

1. Stay signed in to Rsam as the *BCM Manager (r\_bcm\_manager)* user.
2. Navigate to **Business Continuity Management > Process & BIA**.
3. Under **Processes**, click the **Processes** link. The **Processes** grid appears.
4. Locate the required process record and double-click the record to open it. The **Process** record opens.
5. Click **Activate Process**. The process record moves to the **Active** state.

# BCM Strategy Configuration

BCM Strategy records hold information about three key factors that help a user quickly decide on a recovery plan. The key factors are the list of risk scenarios, the plan to be executed when the risk occurs, and the objects for which this strategy is applicable.

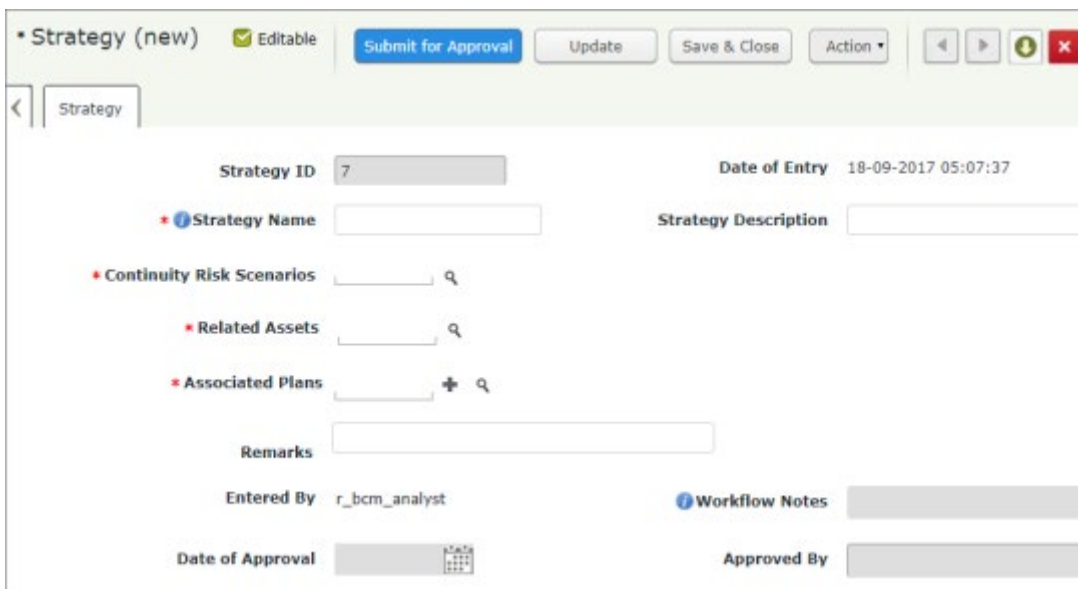
The tasks involved are as follows:

1. [Creating a BCM Strategy](#)
2. [Reviewing and Approving BCM Strategy](#)

## Step 1: Creating a BCM Strategy

To create a BCM strategy, perform the following steps:

1. Sign in to Rsam as the *BCM Analyst (r\_bcm\_analyst)* and on the navigation panel on the left, navigate to **Business Continuity Management > Strategy Management**.
2. On the right panel, under **Create BCM Strategy**, click **Create New BCM Strategy**. The **Strategy (new)** record opens with the **Strategy** tab selected.



The screenshot shows a web application interface for creating a new BCM Strategy. The form is titled "Strategy (new)" and includes a "Submit for Approval" button. The form fields are as follows:

- Strategy ID: 7
- Date of Entry: 18-09-2017 05:07:37
- Strategy Name: [Text Field]
- Strategy Description: [Text Field]
- Continuity Risk Scenarios: [Text Field]
- Related Assets: [Text Field]
- Associated Plans: [Text Field]
- Remarks: [Text Field]
- Entered By: r\_bcm\_analyst
- Workflow Notes: [Text Field]
- Date of Approval: [Text Field]
- Approved By: [Text Field]

3. Provide a name for the strategy in the **Strategy Name** field. It is recommended to provide a name that includes the risk scenario and action to be taken. **Example:** Evacuation of Facility during Fire, Work from DR location when Facility level environmental risk happens, etc.

4. Provide a detailed description about the strategy, in the **Strategy Description** field.
5. Select the **Continuity Risk Scenarios** to be addressed in the strategy record.
6. Select the objects for which this strategy is applicable, in the **Related Assets** field.
7. Select the business plans to be executed when the risk scenarios selected in the previous step occurs, in the **Associated Plan** field. To create a new plan, click the **+** icon.

**Note:** You must ensure that the plans selected are in the **Published** state before submitting the strategy for Approval.

8. Click **Submit for Approval** to move the record to the **Submitted for Approval** state.

## Step 2: Reviewing and Approving BCM Strategy

To review and approve the BCM Strategy, perform the following steps:

1. Sign in as the *BCM Manager* (*r\_bcm\_manager*) and in the left navigation panel, navigate to **Business Continuity Management > Strategy Management**.
2. On the left panel, under **BCM Strategies**, click **BCM Strategies** link. The Strategies list appears.
3. Locate the required strategy in the **Submitted for Approval** state and double-click to open the record.  
The strategy record opens with the **Strategy** tab selected.
4. Review the values provided in the required fields.
5. Review the completeness of the plans associated. Plan should be in **Published** state.
6. Click **Approve** to move the record to **Strategy Approved** state.

# Business Continuity Plan Configuration

---

In Rsam, Business Continuity Plans are segregated into three types as follows:

- **Business Continuity Plan** – These plans are developed for the departments, business processes, teams or vendors, to be executed when an environmental or political crisis happens.
- **IT Disaster Recovery Plan** – These are plans that are applicable only for IT objects like Software applications, servers, etc., when the availability or continuity of the IT objects is affected by a crisis.
- **Facility Emergency Plan** – These are plans that are exclusively applicable for facilities and explain the steps to be followed to evacuate the facility and move people to a safer location or alternate location during a crisis.

The tasks involved are as follows:

1. [Creating a Business Continuity Plan](#)
2. [Setting Planning Team and Initiating Plan Content Development](#)
3. [Developing Plan and Submitting for Review](#)
4. [Reviewing and Submitting Plan for BCM Manager Review](#)
5. [Reviewing and Publishing the Plan](#)
6. [Initiating Plan Revision](#)
7. [Generating Plan Execution/Plan Exercise](#)

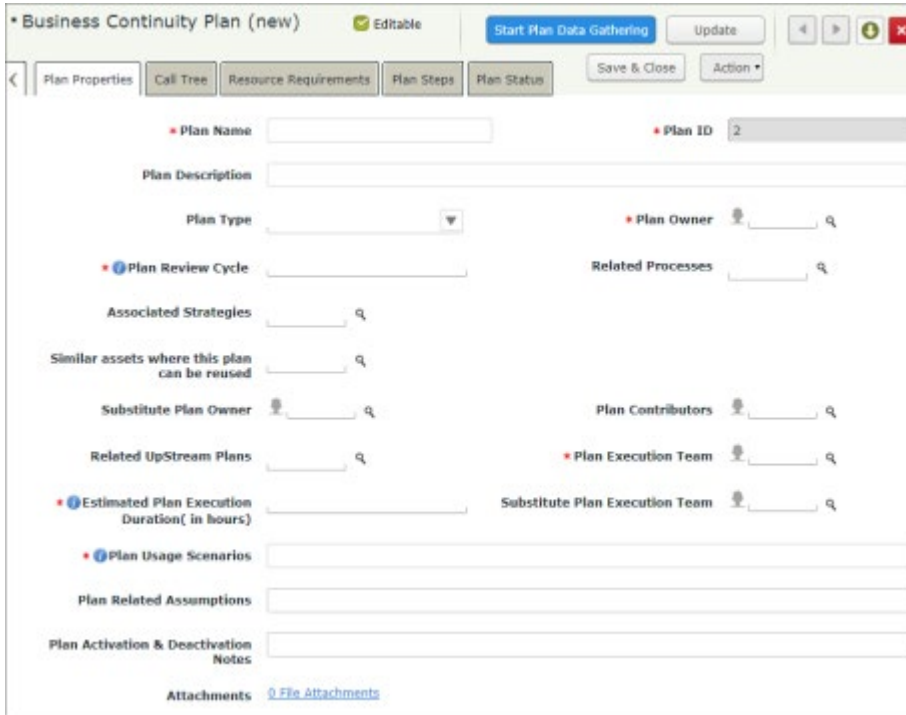
## Step 1: Creating a Business Continuity Plan

To create a Business Continuity Plan, perform the following steps:

1. Sign in to Rsam as the *BCM Manager* (*r\_bcm\_manager*) and on the navigation panel on the left, navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click **Create New BCM Plan**.  
Page refreshes to display the list of Object types associated with the Business Continuity Plan record type.



- Click **Select** link corresponding to the required Parent Object for which the business plan must be created.  
The Business Continuity Plan (new) record opens with the **Plan Properties** tab selected.



- Provide a Name and Description for the plan in the **Plan Name** and **Plan Description** fields.
- Select a plan type from **Plan Type** drop down list.
- Set the **Plan Owner** by clicking the search icon and selecting the user from the user lookup dialog that appears.
- Provide the number of days for the plan revision cycle in the **Plan Revision Cycle** field.
- Select required values in the **Associated Strategies** and **Related Processes** fields.
- Provide values for all other required fields and click **Start Plan Data Gathering**. The plan moves to the **Plan Data Gathering** state.

## Step 2: Setting Planning Team and Initiating Plan Content Development

To set the planning team and initiate the plan content development, perform the following steps:

1. Sign in to Rsam as the *Plan Owner (r\_bcm\_plan\_owner)* and on the navigation panel on the left, navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click the **BCM Plans** link. The page refreshes to display object types for which plans are available.
3. Click the **Select** link corresponding to the required object type.
4. Locate the required plan and double-click the required plan. The record opens with the **Plan Properties** tab on display.
5. Assign the **Plan Contributors**, who knows the technical details of the objects for which the plan is created and the regular activities that are performed in the object.
6. Provide values for other attributes on the **Plan Properties** tab, as listed in the following table.

| Attribute Name                                      | Description   |
|---|---|
| <b>Similar assets where this plan can be reused</b> | Other assets same as the parent object under which the plan has been created. This eases the process of recreating the plan for other similar objects. This field maintains the link of similar plans and the link is mapped to all objects' respective BCM Profiles. |
| <b>Related Upstream Plans</b>                       | List of plans that should be executed before executing the current plan record.   |
| <b>Plan Related Assumptions</b>                     | Any assumptions that were made while developing the plan. These become the pre-requisites for executing the plan during crisis.   |
| <b>Plan Activation &amp; Deactivation Notes</b>     | Points to be considered or approvals to be taken before activating or deactivating the plan.  |
| <b>Plan Usage Scenarios</b>                         | List of risk scenarios in detail, under which this plan must be executed. Provides some indicators on assessing the extent of damage before executing the plan.   |
| <b>Plan Execution Team</b>                          | List of people who will be executing the plan when the crisis happens.  |

| Attribute Name                                      | Description   |
|---|---|
| <b>Substitute Plan Execution Team</b>               | List of people who will be executing the plan when the crisis happens and the plan execution team is not available. |
| <b>Estimated Plan Execution Duration (in hours)</b> | Time that can be taken by the execution team to completely execute this plan.                                       |

7. Click **Build Plan**. The record moves to the **Plan Building** state.

### Step 3: Developing Plan and Submitting for Review

To develop the plan and submit it for review, perform the following steps:

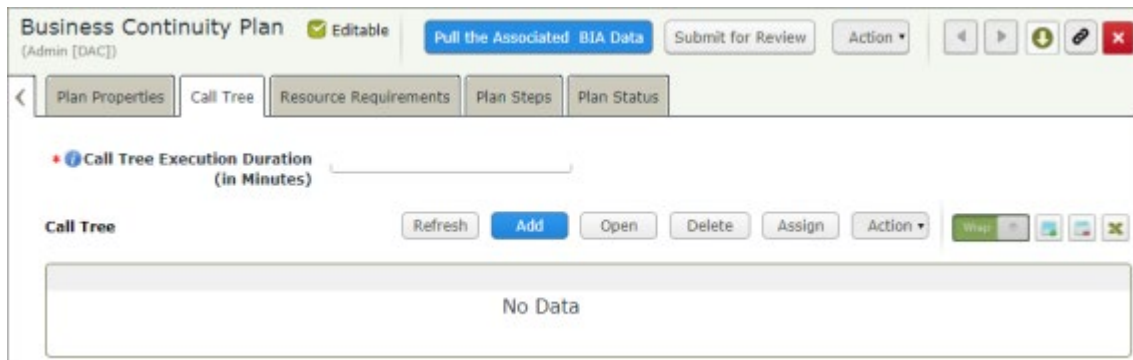
1. Sign in to Rsam as the *Plan Contributor (r\_bcm\_plan\_contributor)* and on the navigation panel on the left, navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click the **BCM Plans** link. The page refreshes to display object types for which plans are available.
3. Click the **Select** link corresponding to the required object type.
4. Locate the required record and double-click the Plan record to open it. The record opens with the **Plan Properties** tab on display.

### Building a Call Tree

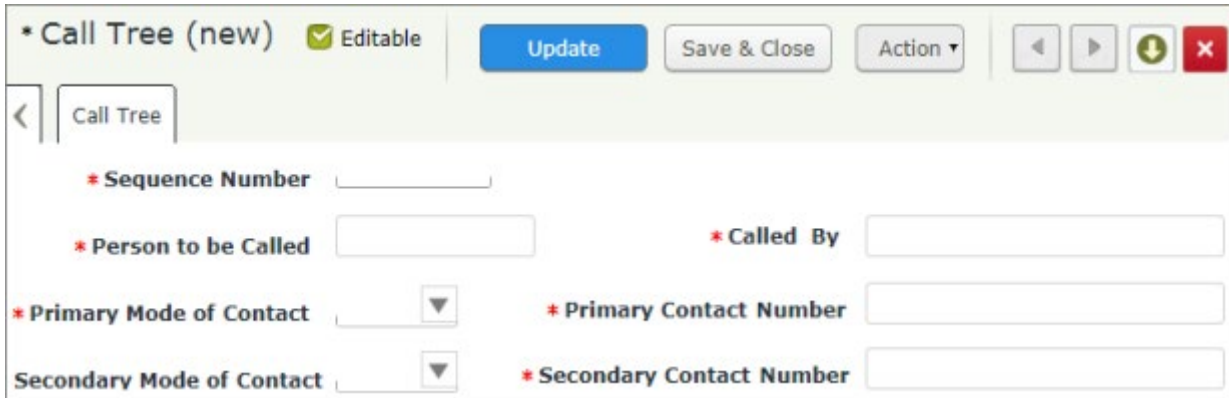
Call tree is an important crisis communication activity. When a crisis occurs and the BCP is initiated, the team involved in the affected object should be notified on the BCP initiation and the steps to be followed. Call tree is a mechanism that shows who will be called by whom to communicate the details of the crisis. This allows the crisis information to be passed on to users quickly, without creating any confusion among the involved individuals.

To configure the Call Tree details, perform the following:

5. Click the **Call Tree** tab.



6. Click **Add > Call Tree**. The **Call Tree** tab is selected in the child record that opens.



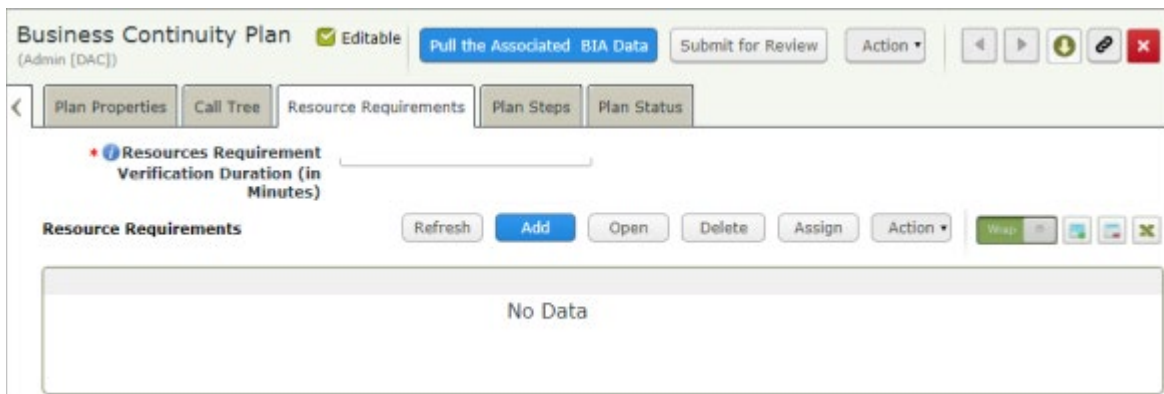
- a. Provide the details of the Call Tree **Person to be Called**, which represents the individual / authority to be notified, **Called By**, which represents the person who must initiate the call and the mode of contact and contact details.
  - b. Click **Save & Close**.
  - c. Repeat the steps for each user to be notified / communicated at the time of BCP initiation.
7. Provide the time to be taken for executing the Call Tree in the **Call Tree Execution Duration (in Minutes)** field.

## Building Resource Requirements

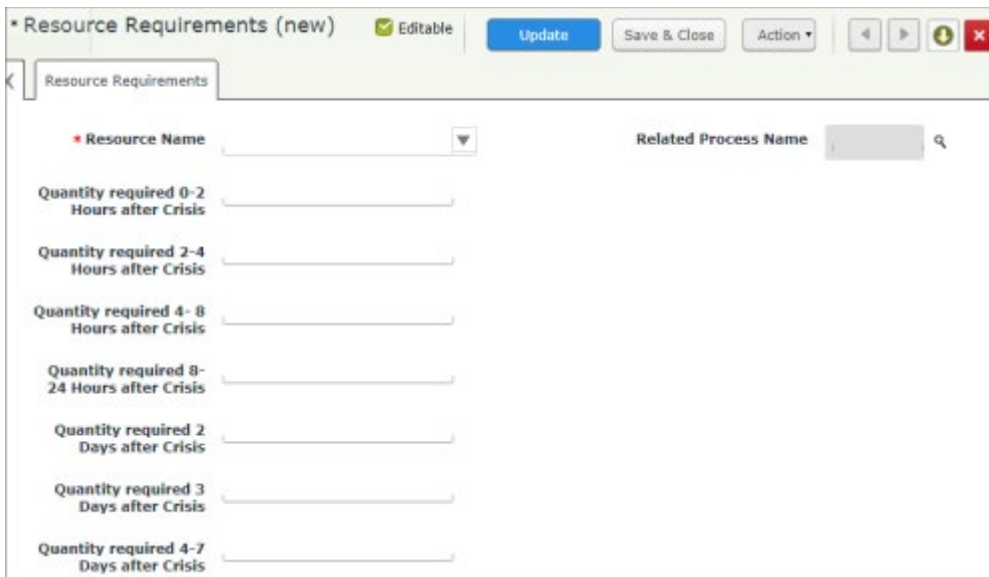
For a recovery to be successful, the business plan execution team should be provided with required resources in the right quantities. Before starting the plan execution, the execution team will verify the availability of the resources for the initial hours of crisis. This information is stored in the **Resource Requirements** child record.

To configure the resource requirements, perform the following steps:

8. Click **Resource Requirements** tab.



9. Click **Add > Resource Requirements**.  
The **Resource Requirements** tab is selected.



- a. Select the **Resource Name** from the drop-down list available.
  - b. Provide the quantity of the resources required across the various crisis intervals mentioned.
  - c. If the resources selected and quantities mentioned are applicable only for certain processes, then select the required process in the **Related Process Name** field.
  - d. Click **Save & Close**.
  - e. Repeat the preceding steps for each of the resources required at the time of BCP initiation.
10. Provide value in the **Resources Requirement Verification Duration (in Minutes)** field.

## Building Plan Steps

You can add plan steps from the **Plan Steps** tab and the steps can be added by performing any of the following methods:

- [Copy Related Process Tasks](#)
- [Copy Related Process Workarounds](#)
- [Use Add button to add Plan Steps](#)

### Adding Plan Steps using Copy Related Process Task

In the **Plan Steps** tab, click **Action > Copy Related Process Task**.

This action will automatically copy the process tasks in the related processes associated to the plan record and add them as Plan steps in the plan.

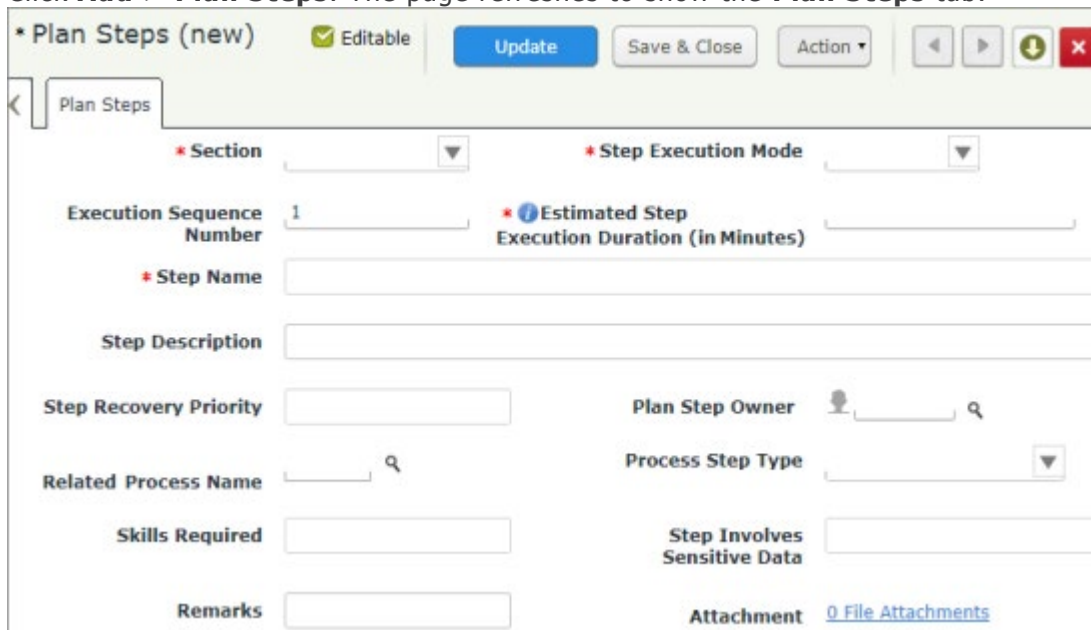
### Adding Plan Steps using Copy Related Process Workaround

In the Plan Steps tab, click **Action > Copy Related Process Workaround**.

This action will automatically copy the process workarounds in the related processes associated to the plan record and add them as Plan steps in the plan.

### Adding Plan Steps using the Add Button

11. Click **Add > Plan Steps**. The page refreshes to show the **Plan Steps** tab.



The screenshot shows a web form titled "Plan Steps (new)". At the top, there are several controls: a green checkmark labeled "Editable", a blue "Update" button, a grey "Save & Close" button, and an "Action" dropdown menu. To the right are navigation icons: back, forward, refresh, and close. Below these is a breadcrumb "Plan Steps".

The form contains the following fields:

- \* Section: dropdown menu
- \* Step Execution Mode: dropdown menu
- Execution Sequence Number: text input with value "1"
- \* Estimated Step Execution Duration (in Minutes): text input with a warning icon
- \* Step Name: text input
- Step Description: text area
- Step Recovery Priority: text input
- Plan Step Owner: user selection dropdown with search icon
- Related Process Name: text input with search icon
- Process Step Type: dropdown menu
- Skills Required: text input
- Step Involves Sensitive Data: text input
- Remarks: text area
- Attachment: [0 File Attachments](#)

- a. Provide details for the fields available in the page, as listed in the following table.

| Attribute Name  | Description  |
|---|--|
| <b>Execution Sequence Number</b>                      | Mention the execution sequence number for each step.   |
| <b>Section</b>  | Represents the use of plan step with relevance to the crisis phases. This information will give clarity to the plan execution team on which section of the plan steps to be executed and when. |
| <b>Step Execution Mode</b>                            | Parallel or Sequential execution of the current step with respect to the previous step.  |
| <b>Step Name</b>                                      | Short name for the step to recognize the task easily.  |
| <b>Step Description</b>                               | Detailed description of the step to be executed.   |
| <b>Estimated Step Execution Duration (in Minutes)</b> | The time, in minutes, that can be taken for executing this step.   |
| <b>Step Recovery Priority</b>                         | Any priority related information for executing this step. For example, cannot execute if step number 4 fails or execute this step if previous steps failed.                                    |
| <b>Plan Step Owner</b>                                | The member of the execution team assigned for executing this step.   |
| <b>Process name</b>                                   | Process related to this step.  |
| <b>Process Step Type</b>                              | This is a read only attribute. Populated only for plan steps generated using the Copy Related Process Task or Copy Related Process Workaround options.   |
| <b>Skills Required</b>                                | Skill sets required to execute this step, e.g knowledge on Firewall, Knowledge on Robotics, accounting knowledge, knowledge of CBS application etc.,   |
| <b>Step Involves Sensitive Data</b>                   | Any information about the sensitivity of the data involved in this step.   |
| <b>Remarks</b>  | Any information that does not fit into any of the above attributes.  |
| <b>Attachment</b>                                     | Any documents or images that provide more detailed information on the step.  |

12. Click **Save & Close**.
13. Click **Pull the Associated BIA Data** to retrieve the parent object RTO and RPO values for Plan efficiency review.
14. Click **Submit for Review**. The record moves to the **Under Review** state.

## Step 4: Reviewing and Submitting Plan for BCM Manager Review

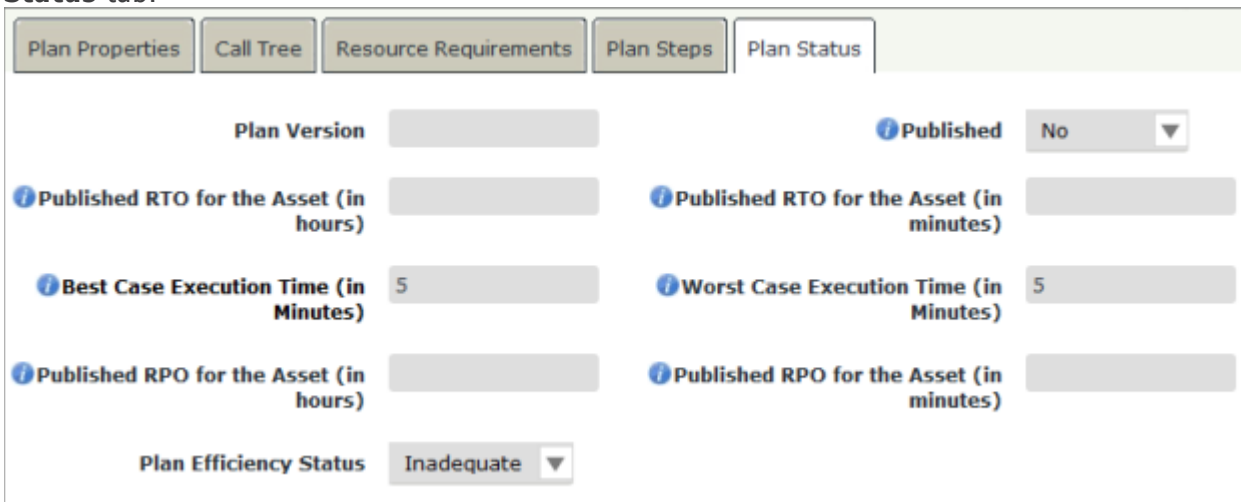
To review and submit the plan for BCM Manager review, perform the following steps:

1. Sign in to Rsam as the *Plan Owner (r\_bcm\_plan\_owner)* and on the navigation panel on the left, navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click **BCM Plans** link. Page refreshes to show the list of object types, corresponding to which Plans are available.
3. Click **Select** link corresponding to the required object.
4. Locate the required plan and double-click the record to open it. The record opens with the **Plan Properties** tab on display.
5. Review the plan data and click **Submit for BCM Manager Review** for further review and approval. The record moves to the **Pending BCM Manager Review** state and a notification is sent to the *BCM Manager*.

## Step 5: Reviewing and Publishing the Plan

To review and publish the plan, perform the following steps:

1. Sign in to Rsam as the *BCM Manager (r\_bcm\_manager)* and on the navigation panel on the left, navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click the **BCM Plans** link. The page refreshes to show the list of object types, corresponding to which Plans are available.
3. Click **Select** link corresponding to the required object.
4. Locate the required plan and double-click the record to open it. The record opens with the **Plan Properties** tab on display.
5. Click **Action > Calculate Plan Execution Duration**. The values are updated on the **Plan Status** tab.



| Plan Properties                               | Call Tree  | Resource Requirements | Plan Steps | Plan Status                                     |
|---|------------|-----------------------|------------|---|
| Plan Version                                  |            |                       |            | <b>Published</b> No                             |
| <b>Published RTO for the Asset (in hours)</b> |            |                       |            | <b>Published RTO for the Asset (in minutes)</b> |
| <b>Best Case Execution Time (in Minutes)</b>  | 5          |                       |            | <b>Worst Case Execution Time (in Minutes)</b> 5 |
| <b>Published RPO for the Asset (in hours)</b> |            |                       |            | <b>Published RPO for the Asset (in minutes)</b> |
| Plan Efficiency Status                        | Inadequate |                       |            |   |



Rsam calculates the Best Case execution and Worst Case execution time for the plan. If the **Estimated Plan Execution duration (in minutes)** is less than the **Published RTO for the Asset (in minutes)**, then the **Plan Efficiency Status** will be updated as **Adequate**. Otherwise, it will be set as **Inadequate**.

**Note:**

- **Best Case Execution Duration (Minimum)** = Call tree execution duration + Resources Requirement execution duration + Highest execution duration of plan steps (assuming all plan steps are executed in parallel)

- **Worst Case Execution Duration (Maximum)** = Call tree execution duration + Resources Requirement execution duration + Sum of all plan steps execution duration (assuming all plan steps are executed sequentially)

These are the minimum plan execution duration and maximum plan execution duration. If the estimated plan execution duration value lies between the minimum and maximum, then the estimated plan execution duration is a realistic value. This information will help the reviewer to quickly evaluate the plan efficiency.

6. Review the plan details and click **Approve**. The plan moves to the **Published** state.

## Step 6: Initiating Plan Revision

If the plan is in Published state and the number of days in published state is greater than or equal to the Plan revision cycle value, then the record is automatically moved to the **Due for revision** state. To initiate the plan revision, perform the following steps:

1. Sign in to Rsam as *BCM Manager (r\_bcm\_manager)* or *BCM Analyst*.
2. Navigate to the required Published BCM Plan record and double-click to open the record.
3. Click Action >Initiate Plan Revision. The plan record is moved to the **Build Plan** state. On the **Plan Status** tab, **No** is selected in the **Published** field.

## Step 7: Generating Plan Execution/Plan Exercise

A *BCM Plan Owner* can generate plan execution / plan exercise from plan records that are in the **Published** state. For more information, see [Generating Plan Execution / Plan Exercise](#).

# BCM Profile Update and Submit

---

The BCM Profile is created for the required objects. For more information on creating a BCM profile, refer the *BCM Baseline Configuration Guide*. The BCM profile generated for the object must be updated with the plan and BIA data and then submitted for review.

**Notes:** Only one BCM Profile Record should be created for an object. Creating multiple BCM Profile records will duplicate the same BCM data of an object. If you are not sure about the RTO, RPO, and MAO values for the BCM profile, it is advised to leave those attributes blank and let the calculated values be inherited from the related BIA.

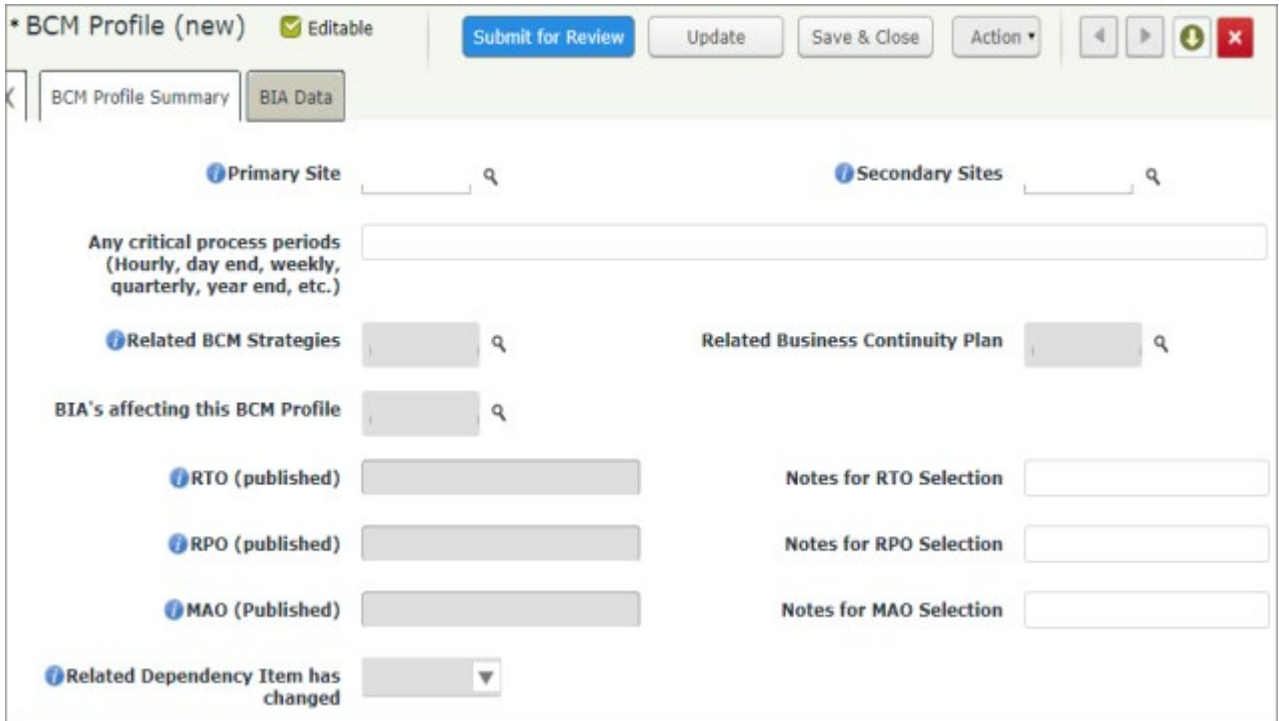
If the **Generate BCM Profile** option is not available from the Action drop down for a selected object it indicates that the Object Type is not configured to be in scope for BCM. In such cases, contact the BCM team or the Rsam Administrator for further information

## Step 1: Updating and Submitting the BCM Profile for Review

To update and submit the BCM Profile, perform the following steps:

1. Sign in to Rsam as the *BCM Manager (r\_bcm\_manager)* or *BCM Analyst (r\_bcm\_analyst)* user and on the navigation panel on the left, navigate to **Business Continuity Management > BCM Universe**.
2. On the right panel, click **BCM Profile**. Page refreshes to show the list of object types with BCM profiles generated.
3. Click **Select** link corresponding to the required object type. The BCM Profile grid appears.

- Double-click the record to open it. The record opens displaying the **BCM Profile Summary** tab.



- Click **Action > Update BCM Data** to update the values for the **Related Business Continuity Plan** attribute and for fields in the **BIA Data** tab.  
If the related BIA is in **Completed** state, the attribute values in the **BIA Data** tab will be populated. If the related BIA record is not in **Completed** state, then attributes will not be updated. Similarly, if the BCM profile is not added to any of the BCM strategies, then the associated Business Continuity Plan will not be updated.
- When all the attribute values are populated except for **RTO (Published)**, **RPO (Published)**, and **MAO (Published)**, then click **Submit for Review** to submit the profile for review.

### Calculation of Values in BCM Profile

Usually RTO, RPO, and MAO values are calculated in the BIA stage and updated to the associated BCM profile. However, if the organization wants to override RTO/RPO/MAO calculations, users can provide those values in the BIA tab. Users can provide the preferred RTO (Override), RPO (Override), MAO (override) and their respective notes for selection values for the BCM Profile.

## Step 2: Approving BCM Profile

To approve the BCM Profile, perform the following steps:

1. Sign in to Rsam as the *BCM Manager (r\_bcm\_manager)* or *BCM Analyst* user and on the navigation panel on the left, navigate to **Business Continuity Management > BCM Universe**.
2. Select the **BCM Profile Navigator** in the Navigators section.
3. Locate the required BCM Profile in the **Profile Pending Review** state and double-click to open it.
4. Verify the BIA data and completeness of the BCM Profile and click **Complete** to approve the BCM profile record.
5. To reject the profile, click **Action > Revert to Pending Edit**.

**Notes:** Before moving the record to **Complete** state, it is important to ensure that the **RTO (Calculated)**, **RPO (Calculated)**, **MAO (Calculated)**, **Related Business Continuity Plan** attributes are populated with correct data, as this is the primary information that will be referenced when the related object is impacted by a crisis event.

# Generating Plan Execution / Plan Exercise

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A Plan Execution / Plan Exercise can be generated in three ways as follows:

- When you want to generate a Plan Execution / Plan Exercise for each of the plans associated to an object, use the **Generate Execution** or **Generate Exercise** button in the **BCM Profile** record.
- When you want to generate a Plan Execution / Plan Exercise for one specific plan associated to an object, navigate to the respective plan and use the **Generate Execution** or **Generate Exercise** button in the **BCM Plan** record.
- When you are not sure about which Plan Execution / Plan Exercise to be generated for the situation, then create a **Crisis / BCM Tests** record and provide the impact details / testing scope with risk scenarios. Clicking the **Pull the associated BCM Plans** button will auto generate the Plan Execution / Plan Exercise that is relevant to the scenario.

## Step 1: Generating a Plan Execution / Plan Exercise from Plan Management

Generating Plan Execution and Plan Exercise can be performed only on plan records that are in the Published state. When there is a need to generate a Plan Execution / Exercise for Crisis Recovery, perform the following steps:

1. Sign in to Rsam as *Plan Owner* and navigate to **Business Continuity Management > Plan Management**.
2. On the right panel, click **BCM Plans** link.
3. Locate the required record in the **Published** state and double-click the record to open it.
4. Click **Generate Plan Execution / Generate Plan Exercise**. This action will generate a plan execution / exercise record for the selected plan under the **Plan Execution / Plan Exercise** Record Category, for the corresponding object.

## Step 2: Generate Plan Exercise / Plan Execution from BCM Profile

**Note:** **Generate Plan Exercise** and **Generate Recovery** buttons will be available only when the BCM Profile record is in **Profile Pending Review** or **Profile Complete** workflow states.

If during a crisis, the BCM Profile Object is impacted, it will save time for the impacted object owner / admin to directly generate Plan execution and start the recovery process. Perform the following steps:

1. Sign in to Rsam as *Object Administrator* and navigate to **Object Navigator > Object**.
2. Double-click the object to open it.
3. Click **BCM Profile**. The BCM Profile list appears.
4. Select the BCM Profile record and click **Action > Generate Plan Execution / Generate Plan Exercise**.

This action will generate the plan exercise / execution record for each of the plans that are available in **Published** state under the BCM Plan category of the object in scope.

# Crisis and Recovery

This section of the tutorial explains the steps involved in reporting and managing a crisis event using the Rsam Business Continuity Management module. The tasks involved are as follows:

1. [Reporting a Crisis Event](#)
2. [Collecting Crisis Impact Data](#)
3. [Declaring Crisis](#)
4. [Associating Plan Executions to Crisis](#)
5. [Initiating Recovery](#)
6. [Recovery in Progress](#)
7. [Submitting the Crisis to BCM Manager for Approval](#)
8. [Reviewing and Approving Crisis – BCM Manager](#)

## Step 1: Reporting a Crisis Event

To report a crisis event, perform the following steps:

1. Sign in to Rsam as *BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **Create New Crisis Event**. The **Crisis (new)** page appears.

The screenshot shows the 'Crisis (new)' form in the Rsam Business Continuity Management module. The form is titled 'Crisis (new)' and has tabs for 'Crisis Details', 'Crisis Impact Details', 'Plans for Execution', and 'Closure Summary'. The 'Crisis Details' tab is active. The form contains several fields: 'Crisis Name', 'Description', 'Crisis Type', 'Crisis Reported by', 'Crisis Location', 'Persons Involved in Crisis', 'Crisis Response & Recovery Leader', 'Crisis ID' (value: 3), 'Crisis Status' (value: Open), 'Date & Time of Crisis Occurrence', 'Date & Time of Crisis Reporting' (value: 9/9/2017 18:21:00), 'Date & Time Crisis Observed', 'First Responders Involved', and 'Crisis Response & Recovery Team'. The form also has buttons for 'Update', 'Save & Close', 'Collect Impact Data', and 'Action'.

3. Provide the **Crisis Name** and **Description**.
4. Provide values in other fields as required.
5. Ensure there is a **Crisis Response & Recovery Leader** assigned for the crisis, before moving the record to next state.
6. Click **Save & Close**.

## Step 2: Collecting Crisis Impact Data

To collect crisis impact data, perform the following steps:

1. Sign in to Rsam as *BCM Analyst (r\_bcm\_analyst)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event**.
3. Locate the required crisis record and double-click to open it. The record opens and displays the **Crisis Details** tab.
4. Click **Collect Impact data** and provide values for the following fields, in the **Crisis Impact Details** tab.

| Attribute Name                                       | Description   |
|--|---|
| <b>Continuity Risk Scenario</b>                      | Select the risk scenarios that created the crisis event.                              |
| <b>Affected Business Processes</b>                   | Select the business processes affected by the crisis, if any.                         |
| <b>Pull Related Objects</b>                          | Use this link to pull the objects associated to the business processes selected.      |
| <b>Facilities Affected</b>                           | Select the facilities affected by the crisis, if any.                                 |
| <b>Affected IT Components</b>                        | Select the IT Components affected by the crisis, if any.                              |
| <b>Affected Business Unit &amp; departments</b>      | Select the BU/Departments affected by the crisis, if any.                             |
| <b>Affected vendors</b>                              | Select the vendors affected by the crisis, if any.                                    |
| <b>Affected Medical Devices</b>                      | Select the medical devices affected by the crisis, if any.                            |
| <b>Information Asset Impact</b>                      | Provide details of the information assets that are damaged or affected by the crisis. |
| <b>Systems Damage Assessment</b>                     | Provide details of the IT Systems that are damaged or affected by the crisis.         |
| <b>Contents Damage</b>                               | Provide details of the data or contents that are damaged or affected by the crisis.   |
| <b>Events Related damage &amp; other information</b> | Any other damage information that does not fit into any of the above.                 |

5. Click **Save & Close**. The record moves to the **Data Gathering** state.



### Step 3: Declaring Crisis

To declare a crisis, perform the following steps:

1. Sign in to Rsam as *BCM Analyst (r\_bcm\_analyst) / BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event**.
3. Locate the required crisis record and double-click to open it. The record opens and displays the **Crisis Details** tab.

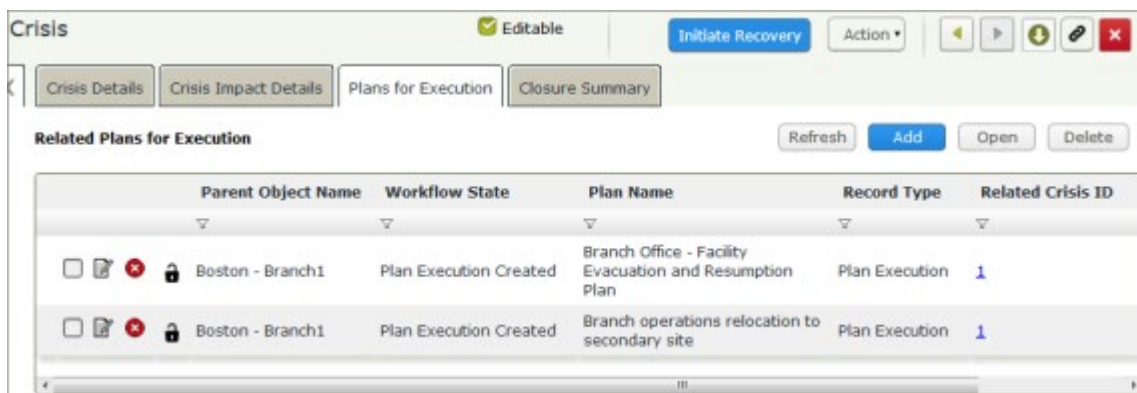
**Note:** Based on the analysis, decide and confirm the Crisis.

4. Click **Confirm Crisis**. This action will automatically pull the BCM Plans to be executed for the recovery. The Plan Execution records will be auto-created and associated with the crisis.

### Step 4: Associating Plan Executions to Crisis

To associate the plan execution to a crisis, perform the following steps:

1. To add a plan for execution, first generate the [Plan Execution](#). Only *Plan Owner / BCM Manager* user will have the privilege to generate plan execution.
2. Navigate to the **Business Continuity Management > Crisis Management**.
3. Click **BCM Crisis Event** and double-click the required record.
4. Click **Plans for Execution** tab.



| Parent Object Name | Workflow State         | Plan Name   | Record Type    | Related Crisis ID |
|--------------------|------------------------|---|----------------|-------------------|
| Boston - Branch1   | Plan Execution Created | Branch Office - Facility Evacuation and Resumption Plan | Plan Execution | 1                 |
| Boston - Branch1   | Plan Execution Created | Branch operations relocation to secondary site          | Plan Execution | 1                 |

5. Click **Add** to add more plans as required and click **Save & Close**.

## Step 5: Initiating Recovery

To initiate recovery, perform the following steps:

1. Sign in to Rsam as *BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record.
3. Click **Initiate Recovery**. This action will notify the Crisis Execution team to start the plan execution and move the Crisis record to the **Recovery Initiated** state.

## Step 6: Recovery in Progress

To move the record to the **Recovery in Progress** state, perform the following steps:

1. Sign in to Rsam as *Crisis Leader (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record.
3. Click **Start Plan Execution**. This action will move the Crisis record to **Recovery in Progress** state.

## Step 7: Submitting the Crisis to BCM Manager for Approval

**Note:** The Crisis Team Member must execute the Plans and it must be approved by the Crisis Leader before it can be reviewed by a BCM Manager. For more information for the execution and approval steps, see [Plan Execution](#).

To submit the crisis to *BCM Manager* for approval, perform the following steps:

1. Sign in to Rsam as *Crisis Leader (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record.
3. Ensure all the associated plan execution steps are in **Completed** state.
4. Click the **Closure summary** tab in the crisis record and provide values for all required fields.
5. Click **Submit for BCM Manager Approval**. The record moves to the **Recovery Review** state.

## Step 8: Reviewing and Approving Crisis – BCM Manager

To review and approve the crisis as a *BCM Manager*, perform the following steps:

1. Sign in to Rsam as *BCM Manager* (*r\_bcm\_manager*) and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record to open it.
3. Review all the completed plan executions and check if recovery was successful.
4. Click **Approved – Close Event** to approve the crisis and move it to the **Closed** state.  
To execute the plan or recovery again, click **Redo Plan Execution** and provide the comments.

# Plan Execution


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Plan Execution is the set of steps defined in the BCM plans and performed during a crisis to recover from it.

## Step 1: Executing Recovery Plans


To execute the recovery plans, perform the following steps:

1. Sign in to Rsam as the *Crisis Team member (r\_bcm\_crisis\_tm)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record to open it.
3. Click **Plans for Execution** tab and perform the following steps:
  - a. Double-click the required plan for execution to open it.
  - b. Click the **Start Execution** button.  
Click this button only when you are ready to start executing the plan as it will capture the start time for the plan execution in the **Execution Results** tab. This value is auto-populated and cannot be edited.
  - c. In the **Execution Results** tab, select the required value in the **Upstream Plans were completed on time?** field.
  - d. Select the **Call Tree** tab and open the child record in the call tree.
  - e. Execute the call and update the status and remarks for the call in the **Status** and **Remarks** fields.
  - f. Click **Save & Close**. Execute the calls for all the required levels mentioned in the call tree.
  - g. Select the **Resources Required** tab and open the child record.
  - h. Analyze and update the values in the **Resource Availability Status** and **Remarks** fields.
  - i. Click **Save & Close**. Repeat the steps for all the mentioned Resource child records.
  - j. Select the **Plan Execution Steps** tab and open the child record.

- k. Select the **Execution Result** tab and provide values in the **Execution Start Time**, **Execution Completion Time**, **Status**, and **Verified By** fields.
  - l. Provide values in any other fields as required and click **Save & Close**. Repeat the steps for all the mentioned child records.
  - m. Click **Execution Results** tab and select the required value for the **Plan Execution Status** field.
  - n. Click **Plan Execution Completed** and click **OK** in the pop up that appears. This action will move the record to **In Review** state.  
Click this button only when you have completed executing the plan as it will capture the end time for the plan execution in the **Execution Results** tab. This value is auto-populated and cannot be edited.
  - o. Repeat steps *a* to *n* for all applicable plan steps.
4. Click  to close the record.

## Step 2: Reviewing Plan Execution

To review the plan execution as a Crisis Leader, perform the following steps:

1. Sign in to Rsam as *Crisis Leader (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > Crisis Management**.
2. Click **BCM Crisis Event** and double-click the required record to open it.
3. Click **Plans for Execution** tab.
4. Double-click the required plan for execution child record, to open it.
5. Review the execution results and remarks.
6. Click **Approved**. The plan execution child record moves to the **Completed** state.
7. Repeat steps *4* to *6* for all plan execution child records.
8. Click  to close the record.

Next, the [Crisis Leader must review](#) and submit the Crisis record for next level of review.

# BCM Tests

In BCM Test, Crisis Leader and Crisis Team members play the role of Test Owner and Test Team Members, respectively.

The tasks involved are as follows:

1. [Creating BCM Test Plan](#)
2. [Defining BCM Test Scope and Schedule](#)
3. [Confirming Test Schedule](#)
4. [Associating Individual Plan Exercise to BCM Tests](#)
5. [Start BCM Test](#)
6. [Recovery in Progress](#)
7. [Submitting the BCM Tests to BCM Manager for Approval](#)
8. [Reviewing and Approving BCM Tests – BCM Manager](#)

## Step 1: Creating BCM Test Plan

To create a BCM test plan, perform the following steps:

1. Sign in to Rsam as *BCM Manager (r\_bcm\_manager) /Plan Owner (r\_bcm\_plan\_owner) /Crisis Leader (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **Create New BCM Test**. The **BCM Test (new)** record opens.

• BCM Test (new) Editable Update Save & Close Define Testing Scope Action

BCM Testing Scope of Testing Plan Exercises Results

• Test Name | Test ID 2

• Test Type Components to be Tested

• Date of Test Eastern Standard Time

• Test Owner Test Team Members

Test Scope Description

Test Scenarios Description

Expected Outcome

3. Provide a name and description for the test.
4. Provide values for other attributes in the tab, as listed in the following table.

| Attribute Name                    | Description  |
|-----------------------------------|--|
| <b>Test Type</b>                  | <p><b>Component Testing:</b> To test only one component of the plan (Call Tree, Resources Availability, or Plan Steps).</p> <p><b>Table Top Testing:</b> To test all the components but the plan steps will be discussed with the test team members to assess their awareness of the plan components.</p> <p><b>Full Scale Testing (Operational Drill):</b> To test all the components, assuming that the continuity risk scenarios selected has occurred.</p> |
| <b>Components to be Tested</b>    | <b>Select the component to be tested. This field is available only when Component Testing is selected.</b>   |
| <b>Test Scope Description</b>     | Provide details and objective of the testing.  |
| <b>Test Scenarios Description</b> | Provide details of the scenarios to be considered for testing.   |
| <b>Expected Outcome</b>           | Provide the expected outcome of the testing.   |

5. Set a **Test Owner** for the test.
6. Click **Define Testing Scope**. The record moves to the **Test Scope Definition** state.

## Step 2: Defining BCM Test Scope and Schedule

To define BCM Test scope and schedule, perform the following steps:

1. Sign in to Rsam as *BCM Analyst (r\_bcm\_analyst) /Test Owner (Crisis Leader) (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests**.
3. Double-click the BCM Test record to open it.
4. Provide values for **Date of Test** and **Test Team Members** fields.

- Click **Scope of Testing** tab and provide values for the other fields, as listed in the following table.

| Attribute Name                                  | Description   |
|---|---|
| <b>Continuity Risk Scenarios</b>                | Select the risk scenarios for which the crisis event is created.                  |
| <b>Affected Business Processes</b>              | Select the business processes affected by the crisis.                             |
| <b>Pull All Dependencies from Processes</b>     | Click this link to pull the assets associated to the business processes selected. |
| <b>Affected Facilities</b>                      | Select the facilities affected by the crisis, if any.                             |
| <b>Affected IT Devices</b>                      | Select the IT devices affected by the crisis, if any.                             |
| <b>Affected Business Unit &amp; Departments</b> | Select the BU/Departments affected by the crisis, if any.                         |
| <b>Affected Vendors</b>                         | Select the vendors affected by the crisis, if any.                                |
| <b>Affected Medical Devices</b>                 | Select the medical devices affected by the crisis, if any.                        |

### Step 3: Confirming Test Schedule

To confirm a test schedule, perform the following steps:

- Sign in to Rsam as *BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > BCM Test Management**.
- Click **BCM Tests**.
- Double-click the BCM Test record created. The record opens and displays the **BCM Testing** tab.
- Click **Confirm Testing Schedule**.

This action pulls the BCM Plans to be exercised for the recovery. The Plan Exercise records will be auto created and associated with the crisis.

**Notes:** When the plan exercise is generated, based on the **Test Type** and the **Component to be Tested** values selected:

- If the Test Type value is **Table Top Testing** or **Full Scale (Operational Testing)**, the whole plan will be recreated as **Plan Exercise**.
- If the Test Type value is **Component Testing**, only one of the plan component will be recreated as part of the Plan Exercise. The component that will be recreated will be based on the value chosen for the attribute **Component to be Tested**.



## Step 4: Associating Individual Plan Exercise to BCM Tests

To associate the plan exercise to a BCM Test, perform the following steps:

1. To add more plans for testing, first generate the [Plan Exercise](#). Only *Plan Owner / BCM Manager* user will have the privilege to generate plan exercise.
2. Navigate to the **Business Continuity Management > BCM Test Management**.
3. Click **BCM Tests** and double-click the required record.
4. Click **Plan Exercise** tab.
5. Click **Add** to add more test plans as required and click **Save & Close**.

## Step 5: Start BCM Test

To start the BCM Test, perform the following steps:

1. Sign in to Rsam as *BCM Manager (r\_bcm\_manager)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record to open it.
3. Click **Initiate Recovery**. It notifies the Test team members to start the plan execution and move the record to **Recovery Initiated** State.

## Step 6: Recovery in Progress

To move the record to the Recovery in Progress state, perform the following steps:

1. Sign in to Rsam as *Test Owner (Crisis Leader) (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record to open it.
3. Click **Start Plan Execution**. This action will move the BCM Tests record to **Recovery in Progress** state.

## Step 7: Submitting the BCM Tests to BCM Manager for Approval

**Note:** The Crisis Team Member must execute the Plans and it must be approved by the Crisis Leader before it can be reviewed by a BCM Manager. For more information for the execution and approval steps, see [Plan Exercise](#).

To submit the BCM Tests to BCM Manager for approval, perform the following steps:

1. Sign in to Rsam as *Crisis Leader* (*r\_bcm\_crisis\_leader*) and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record.
3. Ensure all the related plan exercises are in **Completed** state.
4. Click the **Results** tab in the test record and provide values for all required fields.
5. Click **Submit for BCM Manager Approval**. The record moves to **Recovery Review** state.

## Step 8: Reviewing and Approving BCM Tests – BCM Manager

To review and approve the crisis as a BCM Manager, perform the following steps:

1. Sign in to Rsam as *BCM Manager* (*r\_bcm\_manager*) and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record to open it.
3. Review all the related plan exercises records and check if recovery was successful.
4. Click **Approved – Close Event** to approve the crisis and move it to the **Closed** state.

# Plan Exercise


---

Plan Exercise is the set of steps created to test the efficiency of the BCM Plans.

## Step 1: Executing Recovery Plans


To execute the recovery plans, perform the following:

1. Sign in to Rsam as the *Test Team member (Crisis Team member) (r\_bcm\_crisis\_tm)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record to open it.
3. Click **Plan Exercise** tab and perform the following steps:
  - a. Double-click the required plan for execution to open it.
  - b. Click the **Start Plan Execution** button.  
Click this button only when you are ready to start executing the plan as it will capture the start time for the plan execution in the **Execution Results** tab. This value is auto populated and cannot be edited.
  - c. In the **Execution Results** tab, select the required value for **Upstream Plans were completed on time?** field.
  - d. Select the **Call Tree** tab and open the child record in the call tree.
  - e. Execute the call and update the status and remarks for the call in the **Status** and **Remarks** fields.
  - f. Click **Save & Close**. Execute the calls for all the required levels mentioned.
  - g. Select the **Resources Required** tab and open the child record.
  - h. Analyze and update the values in the **Resource Availability Status** and **Remarks** fields.
  - i. Click **Save & Close**. Repeat the steps for all the mentioned child records.
  - j. Select the **Plan Execution Steps** tab and open the child record.

- k. Select the **Execution Result** tab and provide values in the **Execution Start Time**, **Execution Completion Time**, **Status**, and **Verified By** fields.
  - l. Provide values in any other fields as required and click **Save & Close**. Repeat the steps for all the mentioned child records.
  - m. Click **Execution Results** tab and select the required value for the **Plan Execution Status** field.
  - n. Click **Plan Execution Completed** and click **OK** in the pop up that appears.  
Click this button only when you have completed executing the plan as it will capture the end time for the plan execution in the **Execution Results** tab. This value is auto-populated and cannot be edited.
  - o. Repeat steps *a* through *n* for all applicable plan steps.
4. Click  to close the record.

## Step 2: Reviewing Plan Exercise

To review the plan execution as a Crisis Leader, perform the following steps:

1. Sign in to Rsam as *Crisis Leader (r\_bcm\_crisis\_leader)* and navigate to **Business Continuity Management > BCM Test Management**.
2. Click **BCM Tests** and double-click the required record to open it.
3. Click **Plan Exercises** tab.
4. Double-click the required plan for execution child record, to open it.
5. Review the plan execution results and remarks.
6. Click **Approved**. The plan execution child record moves to the **Completed** state.  
Click **Redo Plan Execution** if the results are unsatisfactory and must be executed again.
7. Repeat steps 4 to 6 for all plan execution child records.
8. Click  to close the record.  
Next, the [Crisis Leader must review](#) and submit the Crisis record for next level of review.

# Appendix 1: Email Notifications and Offline Decision Making

## Setting up Email Addresses

This module is configured to send automated email notifications at specific points in the workflow. In a production system, email addresses are usually gathered automatically using an LDAP server or a directory service. However, the email addresses in your Rsam instance can be manually provided for testing purposes.

To manually provide the email addresses, perform the following steps:

1. Open an Rsam supported browser and enter the URL of your Rsam instance containing the Business Continuity Management module.
2. Sign in as *r\_admin* user. Enter **Username** as *r\_admin* and **Password** as *password*.
3. Navigate to **Manage > Users/Groups**.
4. Double-click a user row to open the details.
5. Provide an email address in the **eMail ID** attribute.

**User Details**  
User Id:  
152048

First Name: Middle Name: Last Name:  
May, [ ] Brian

eMail ID: Phone Number:  
support@rsam.com [ ]

Password:  
.....

Confirm Password:  
[ ]

LDAP User

User's LDAP ID:  
[ ]

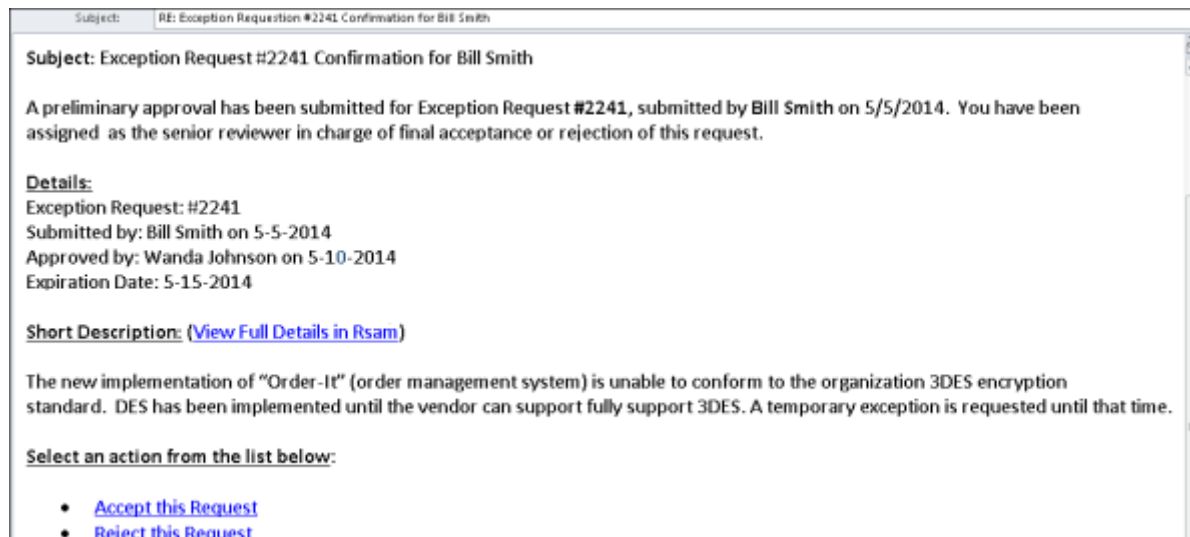
User's LDAP Domain:  
Please select a Domain [ ]

6. Click **OK**.  
The email address of the user account is saved.

## Offline Decision Making

Rsam email notifications are configurable including what notification should be sent, what users or roles will receive the notifications, and the content in the notifications.

Offline Decision Making is a powerful and popular feature of Rsam. It provides the Rsam platform directly to the users to perform workflow actions without connecting to the Rsam module. The following image illustrates an example notification template that has custom text, data from the record, embedded links to the application, and Offline Decision Making actions.



## Appendix 2: Rsam Documentation

### BCM Module Baseline Configuration Guide

To learn more about the pre-configurations in the BCM Module, refer the *BCM Module Baseline Configuration Guide*. You should have received the *BCM Module Baseline Configuration Guide* along with the BCM Module sandbox. If not, please contact your Rsam Customer Representative to obtain an electronic copy of the *BCM Module Baseline Configuration Guide*.

### Online Help

To get familiar with the specific Rsam features used in this configuration, refer the *Rsam End-User Help*, *Rsam Administrator Help*, or both. The Online help you can access 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. Hover the cursor over **Help** and select an Online help from the menu that appears. Depending on your user permissions, you will be able to access the Rsam End-User Help, Rsam Administrator Help, Step-by-Step Tutorials, or all.

The following image shows the *Rsam Administrator Help*, opened from the *Example Administrator* user account.

