SharePoint as a BCM Tool

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- **Excellent document management**...BC/DR plans are very document centric
- **Database capabilities**...to manage employee, supplier, teams, servers, BIA, and other data
- **Notification and tracking**...change management includes automatic email alerts
- **Secure access**...five levels of security, user, folder, document, database, and item
- **Easy to tailor**...for the organization's desired look and feel
- **Familiar tools**...customers use Word, Excel, Access, for most content etc.
- **Widespread usage**...more than 100 million end-users of SharePoint
- **Here to stay**...SharePoint is a strategic and very stable Microsoft platform
- **Cloud Capability**...many SharePoint hosting companies (including Waypoint Advisory)
- **Any number of plans**...a single top-level site can support multiple sub-sites
- **Easy to use**...intuitive design, nearly limitless training/usage resources, most no-cost
- **Added functions**...surveys, workflows, Wiki, scheduling, Office integration, etc.
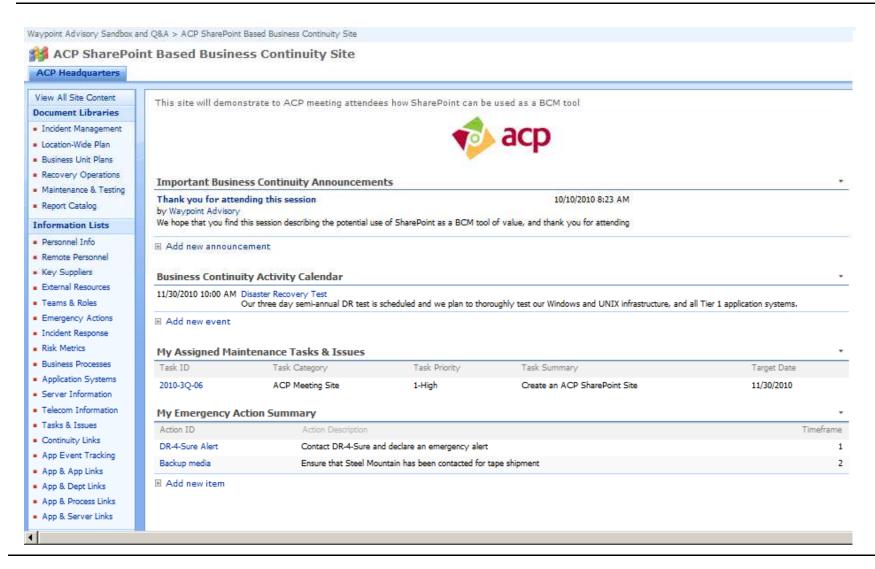- **No software hassle**...no installation, no administration, no maintenance, no bugs, etc.

Selected Screen Shots

- You can include announcements and calendars

- You can also personalize the home page for the user...
  - Identify his/her tasks to complete as part of the continuity program
  - Identify emergency actions to be taken
  - Any other useful information associated with a site user

- Personalization is based upon database lists...
  - Maintain information in the database lists
  - Include a data "view" for that information
  - Expose it on the home page by way of a "web part"

- The home page contains the "quick launch" bar...
  - Links to document libraries, information lists, surveys, and discussions

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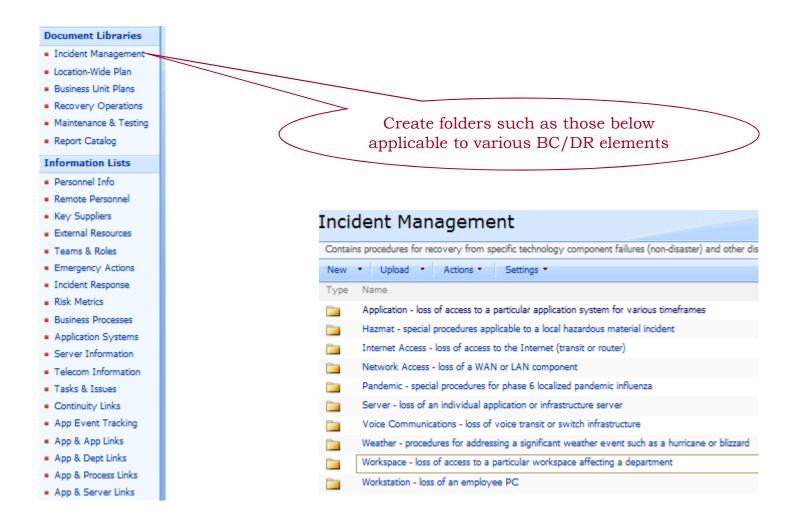
Waypoint Advisory Sandbox and Q&A > ACP SharePoint Based Business Continuity Site

ACP SharePoint Based Business Continuity Site

ACP Headquarters

View All Site Content	This site will demonstrate to ACP meeting attendees how SharePoint can be used as a BCM tool
Document Libraries	
■ Incident Management	acp
■ Location-Wide Plan	
■ Business Unit Plans	
■ Recovery Operations	
■ Maintenance & Testing	**Important Business Continuity Announcements**
■ Report Catalog	**Thank you for attending this session** 10/10/2010 8:23 AM

Information Lists

- Personnel Info
- Remote Personnel
- Key Suppliers
- External Resources
- Teams & Roles
- Emergency Actions
- Incident Response
- Risk Metrics
- Business Processes
- Application Systems
- Server Information
- Telecom Information
- Tasks & Issues
- Continuity Links
- App Event Tracking
- App & App Links
- App & Dept Links
- App & Process Links
- App & Server Links

by Waypoint Advisory
We hope that you find this session describing the potential use of SharePoint as a BCM tool of value, and thank you for attending

⊞ Add new announcement

Business Continuity Activity Calendar

11/30/2010 10:00 AM   Disaster Recovery Test
     Our three day semi-annual DR test is scheduled and we plan to thoroughly test our Windows and UNIX infrastructure, and all Tier 1 application systems.

⊞ Add new event

My Assigned Maintenance Tasks & Issues

Task ID	Task Category	Task Priority	Task Summary	Target Date
2010-3Q-06	ACP Meeting Site	1-High	Create an ACP SharePoint Site	11/30/2010

My Emergency Action Summary

Action ID	Action Description	Timeframe
DR-4-Sure Alert	Contact DR-4-Sure and declare an emergency alert	1
Backup media	Ensure that Steel Mountain has been contacted for tape shipment	2

⊞ Add new item

Document Libraries

- Any number of document libraries can be created

- Any type of document can be located in a document library

- A document library can have any number of descriptive folders

- You can nest folders within folders

- You can also…
    - Link to a document from a database list item
    - Secure a document, or a folder, or an entire library (permissions)
    - Add versioning to a document library
    - Add a workflow to a document library (e.g. plan review/approval)
    - Be notified by way of email when a document/folder/library is accessed

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Document Libraries

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- Business Unit Plans
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Create folders such as those below applicable to various BC/DR elements

Incident Management

Contains procedures for recovery from specific technology component failures (non-disaster) and other dis

| New ▾ | Upload ▾ | Actions ▾ | Settings ▾ |

Type	Name
📁	Application - loss of access to a particular application system for various timeframes
📁	Hazmat - special procedures applicable to a local hazardous material incident
📁	Internet Access - loss of access to the Internet (transit or router)
📁	Network Access - loss of a WAN or LAN component
📁	Pandemic - special procedures for phase 6 localized pandemic influenza
📁	Server - loss of an individual application or infrastructure server
📁	Voice Communications - loss of voice transit or switch infrastructure
📁	Weather - procedures for addressing a significant weather event such as a hurricane or blizzard
📁	Workspace - loss of access to a particular workspace affecting a department
📁	Workstation - loss of an employee PC

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Information Lists

- Databases that can contain a variety of information…
  - Personnel, suppliers, apps and servers, emergency actions, tasks & issues, etc.
  - BIA and risk assessment metrics, app/server relationships, business processes
  - Test/recovery application tracking, important business/tech links
  - Whatever else fits your environment

- Lists can be…
  - Viewed in a limitless number of ways
  - Secured in the same manner as document libraries
  - Edited by way of a standard form view
  - Edited by way of a worksheet view (copy/paste data from external sources)
  - Exported to Excel

- You can generate great reports from information lists…
  - Use Microsoft Access to download data, produce reports (best approach)
  - Use SQL Server Reporting Services or Crystal or other

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Each list can have any number of "views"

Incident Response

Use this list to maintain department-specific responses by timeframe to disruptive events.

New ▾ | Actions ▾ | Settings ▾

Edit	Department	Access Denied To	Hours	Action Summary
	Accounting	Billing Application	24	Extract daily labor times and customer number information from the t
	Accounting	PC Equipment	24	Utilize personally owned PCs (home workers) or allocated equipment
	Accounting	Workspace	24	Designated individuals will work at their homes. Refer to the VPN pr
	Accounting	Billing Application	48	Continue labor time extraction process. Calculate the total billing amo
	Accounting	Workspace	48	Those not working at their home office will resume work at the Bran
	Accounting	Billing Application	72	Create manual invoices for largest accounts and email to customers.
	All Departments	Email	4	In the case of an Exchange failure, then the Email-Any-Where servic
	Customer Care	Workspace	2	Rent a meeting room at the Marriott and use their business center for
	Customer Care	Workspace	24	Work at the Valley Forge office. Timeshare the few available workst
	Customer Care	PC Equipment	24	Use spare PC equipment located at the Valley Forge office. Note tha
	Customer Care	Workspace	48	Use the DR-4-Sure backup workspace service (PCs and voice availal
	Sales	Billing Application	24	Notify certain key customers of possible billing delay. Note that their
	Sales	Workspace	24	Work at home offices and access the network by way of VPN. Use
	Sales	PC Equipment	24	Use personally owned laptop computers (or Acme Widgets laptops th
	Sales	Workspace	96	Resume work at the Brandywine location. Transportation will be arra

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- Use surveys to...

  - Gauge the relative level of preparedness across the organization

  - Collect information from departments such as BIA information

  - Whatever else fits your needs

  - Note you can display results graphically or export to worksheet

- Use discussions to...

  - Get feedback on a variety of topics (risk management, DR testing, etc.)

  - Make BC/DR planning more collaborative

Identify the desired timeframe following a disaster within which access to technology assets is required by your department?
*

	< 4 Hrs	< 24 Hrs	< 48 Hrs	
	1	2	3	Not Required
Voice	○	○	○	○
Internet	○	○	○	○
Network	○	○	○	○
Email	○	○	○	○
File Shares	○	○	○	○
SQL Apps	○	○	○	○
SharePoint	○	○	○	○
ERP System	○	○	○	○

Identify your department's overall recovery time objective (when business operations are fully resumed). *

○ < 4 Hrs
○ < 24 Hrs
○ < 48 Hrs

Identify alternate workspaces desired for your department. *

	Not Feasible	Acceptable	Desired
	1	2	3
Home Office	○	○	○
Hotel Meeting Room	○	○	○
DR-4-Sure Workspace	○	○	○
Acme Valley Forge	○	○	○
Combination of Above	○	○	○

Do you want your entire department to resume work at the same location?

☑

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Overall Readiness

Use this list to conduct discussions regarding overall preparedness to respond to an emergency situation and a disaster scenario.

Actions ▾ | Settings ▾

Threading

Started: 10/10/2010 8:15 AM by Waypoint Advisory

Site Security

All employees should be aware of our standard security procedures including the use of a card key for entry and exit, challenging persons not wearing a visitor

Posted: 10/10/2010 8:15 AM by Waypoint Advisory

I recently observed an unbadged person trying to open the door to the data center.

⯆ Show Quoted Messages

Posted: 10/10/2010 8:15 AM by Waypoint Advisory

After finishing work late the other evening, I saw a vehicle driving slowly (suspiciously) around the parking lot and left hurredly when I was seen.

⯆ Show Quoted Messages

Summary

- SharePoint is a pragmatic approach to BC/DR program management

- Widespread use of SharePoint technology is key to its simplicity and longevity

- No software hassle or maintenance

- Intuitive interface, no formal training is required

- Easily affordable (SharePoint is a free download)

- Waypoint Advisory can help you build a SharePoint environment with "Web Planner"
    - CBCP designed template for self-hosting in your environment or...
    - Highly available hosted service or...
    - Fully managed service
    - Learn more at our site or follow up by email
    - www.waypointadvisory.com info@waypointadvisory.com

Thank You!

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