SharePoint as a BCM Tool

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Waypoint Advisory
610-358-1202
www.waypointadvisory.com
info@waypointadvisory.com
SharePoint Summary...

- 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
Home Page...

- 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
This site will demonstrate to ACP meeting attendees how SharePoint can be used as a BCM tool.

Important Business Continuity Announcements

Thank you for attending this session 10/10/2010 8:23 AM
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

<table>
<thead>
<tr>
<th>Task ID</th>
<th>Task Category</th>
<th>Task Priority</th>
<th>Task Summary</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-3Q-06</td>
<td>ACP Meeting Site</td>
<td>1-High</td>
<td>Create an ACP Sharepoint Site</td>
<td>11/30/2010</td>
</tr>
</tbody>
</table>

Add new item

My Emergency Action Summary

<table>
<thead>
<tr>
<th>Action ID</th>
<th>Action Description</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR.4-Sure Alert</td>
<td>Contact DR.4-Sure and declare an emergency alert</td>
<td>1</td>
</tr>
<tr>
<td>Backup media</td>
<td>Ensure that Steel Mountain has been contacted for tape shipment</td>
<td>2</td>
</tr>
</tbody>
</table>

Add new item
Document Libraries
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
Create folders such as those below applicable to various BC/DR elements
Information Lists
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
Information Lists…

Each list can have any number of “views”

### Incident Response

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

<table>
<thead>
<tr>
<th>New</th>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

• 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?

<table>
<thead>
<tr>
<th></th>
<th>&lt; 4 Hrs</th>
<th>&lt; 24 Hrs</th>
<th>&lt; 48 Hrs</th>
<th>Not Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Internet</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Network</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Email</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>File Shares</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>SQL Apps</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>SharePoint</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>ERP System</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

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

- ☐ < 1 Hrs
- ☐ < 24 Hrs
- ☐ < 48 Hrs

### Identify alternate workspaces desired for your department. *

<table>
<thead>
<tr>
<th>Workspace</th>
<th>Not Feasible</th>
<th>Acceptable</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Office</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Hotel Meeting Room</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>DR/4-Sure Workspace</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Acme Valley Forge</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Combination of Above</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

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

☑
Discussion...

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 exits, 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 hurriedly when I was seen.

Show Quoted Messages

Waypoint Advisory
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!