



BC-3

4.4 Reviews

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Administration

1. Dropdown Lists

There is a new list 'Review Compliance Question' which maintains a list of user defined answers available during the review process

The screenshot shows a web interface titled 'Dropdown Lists'. The main section is 'Add/Edit Review Compliance Question'. It features a text input field for 'Review Compliance Question*' containing the word 'Compliant', and a date picker for 'Expiry date'. Below these are 'Save' and 'Cancel' buttons. A 'Hide' button is located below the form. Underneath is a table titled 'Available Items' with two columns: 'Review Compliance Question' and 'Expiry Date'. The table contains two rows: 'Compliant' and 'Non Compliant', each with an 'Edit' link. A 'Back' button is at the bottom left.

2. Review Question Sets

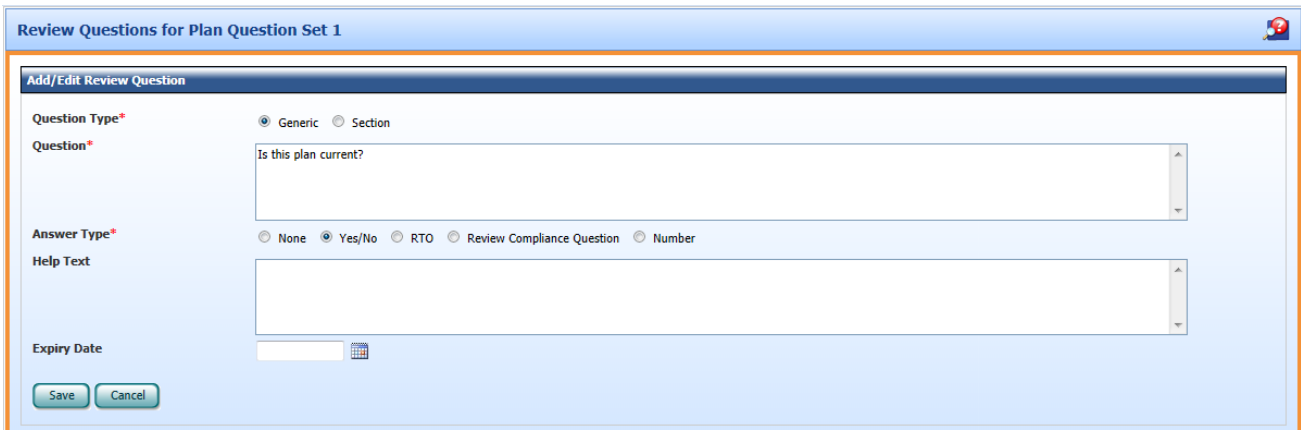
Once the business entities have been developed, as part of the ongoing management process they are subject to regular reviews at pre-set intervals and updated when necessary.

Each Review consists of a number of questions and these questions are created and maintained via the Review Question Sets screen. The set is then attached to a template. More than one question set can be created per entity type.

The screenshot shows a web interface titled 'Review Question Sets'. The main section is 'Add/Edit Review Question Sets'. It features a text input field for 'Name*' containing 'Plan Question Set 1', a dropdown menu for 'Entity Type*' set to 'Plan', and a date picker for 'Expiry Date'. Below these are 'Save', 'Cancel', and 'Review Questions' buttons. A 'Hide' button is located below the form. Underneath is a table titled 'Review Question Sets' with three columns: 'Name', 'Entity Type', and 'Expiry Date'. The table contains five rows, each with an 'Edit' link. The 'Review Questions' button is highlighted with a red box.

Once the set has been created, use the 'Review Questions' button to add questions to the set

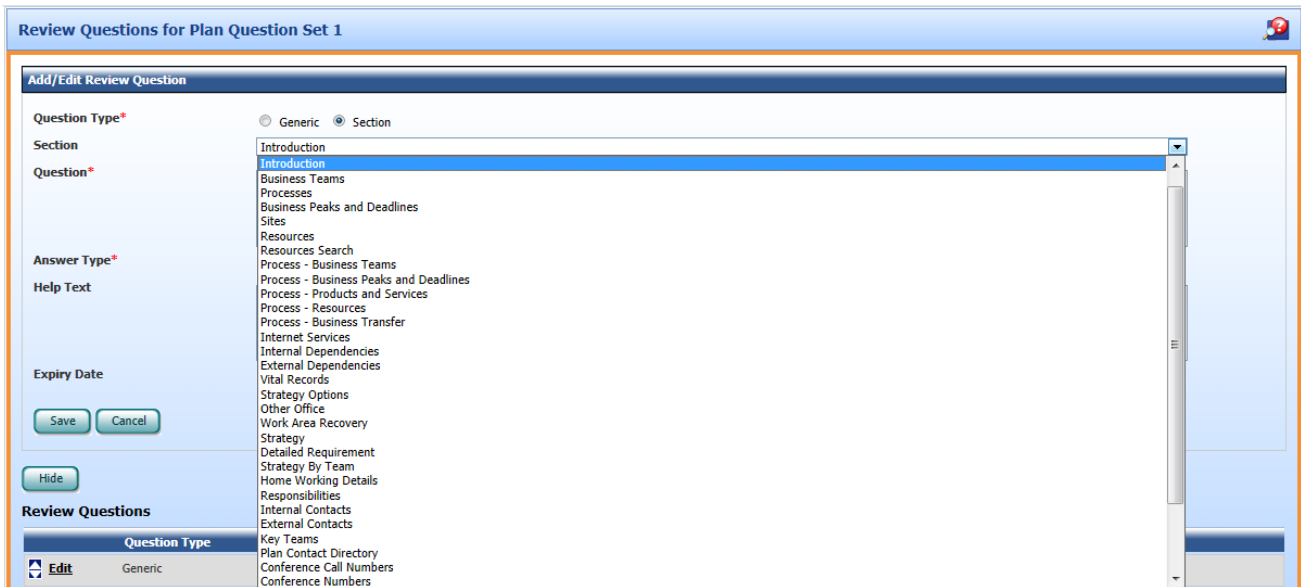
Questions can either be 'Generic' or against a particular 'Section'.



The screenshot shows a web application window titled "Review Questions for Plan Question Set 1". Inside, there is a form titled "Add/Edit Review Question". The "Question Type*" field has two radio buttons: "Generic" (which is selected) and "Section". The "Question*" field contains the text "Is this plan current?". The "Answer Type*" field has five radio buttons: "None", "Yes/No" (selected), "RTO", "Review Compliance Question", and "Number". There are also fields for "Help Text" and "Expiry Date" with a calendar icon. At the bottom left of the form are "Save" and "Cancel" buttons.

When the 'Section' radio button is selected a further dropdown list will appear, to select which section the question is associated with.

N.B. Only one question per section can be created.

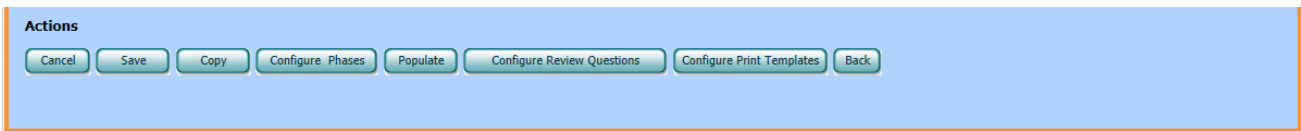


This screenshot shows the same "Add/Edit Review Question" form, but now the "Section" radio button is selected. A dropdown menu is open, displaying a list of sections. The "Introduction" section is highlighted in blue. The list includes: Introduction, Business Teams, Processes, Business Peaks and Deadlines, Sites, Resources, Resources Search, Process - Business Teams, Process - Business Peaks and Deadlines, Process - Products and Services, Process - Resources, Process - Business Transfer, Internet Services, Internal Dependencies, External Dependencies, Vital Records, Strategy Options, Other Office, Work Area Recovery, Strategy, Detailed Requirement, Strategy By Team, Home Working Details, Responsibilities, Internal Contacts, External Contacts, Key Teams, Plan Contact Directory, Conference Call Numbers, and Conference Numbers. The "Question*" field is empty. The "Answer Type*" field is empty. The "Expiry Date" field is empty. At the bottom left, there are "Save", "Cancel", and "Hide" buttons. At the bottom right, there is a "Review Questions" section with a table showing "Question Type" as "Generic" and an "Edit" button.

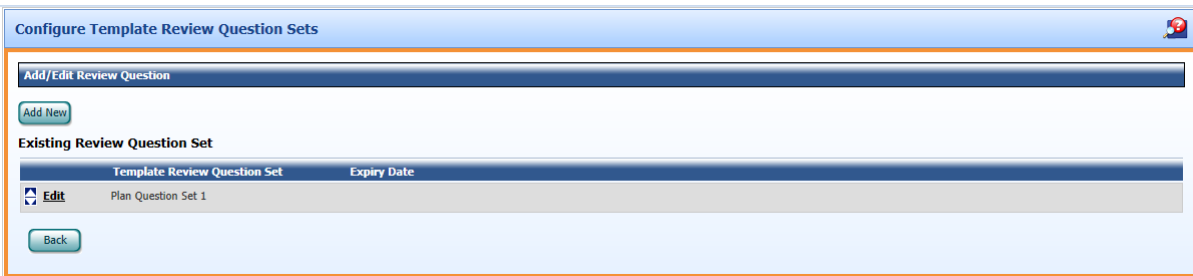
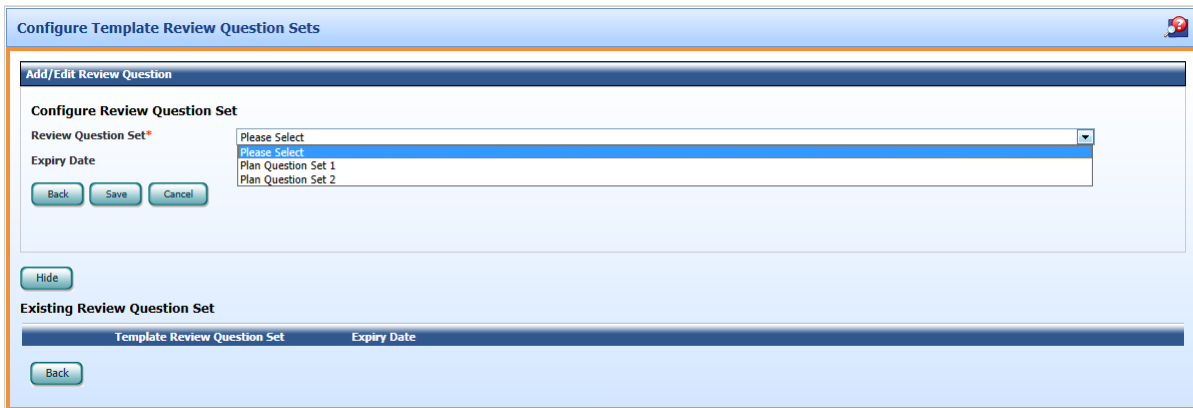
Select the answer type appropriate to the question from the list. The available answers to the 'Review Compliance Question' are maintained through the dropdown list.

3. Templates

Once a Review Question Set has been created, it can then be applied to a template and ultimately to all entities created from the template. There is a new button 'Configure Review Questions', found at the bottom of the page



Use the 'Add New' button to select which question set is associated with the template. The list of available question sets, will only contain those associated with the same Entity Type as your template.



N.B. If there is more than one Review Question Set added to a template, when the entity requires reviewing, the questions will be merged together into one Review.

User

1. Perform a Review

On your homepage you will have a section for 'Outstanding Reviews' which lists any entity which is due a Review.

The screenshot shows a dashboard with four main sections:

- Outstanding Reviews:** A table with columns: Name, Entity Type, Review Date, SLA. One entry: Finance, Plan, 28/03/2014 00:00:00, 10 day(s) remaining.
- My BIAs:** A table with columns: Name, Type, Live Date, Status, SLA. One entry: Operations, BIA, 07 Dec 2013 03:52 PM, Live, 166 day(s) remaining.
- My Plans:** A table with columns: Name, Type, Live Date, Status, SLA. Three entries: Crisis Management Team (Crisis Management Plan, Live, 73 day(s) remaining), Finance (Business Recovery Plan, Performing Review, 10 day(s) remaining), IT (IT Recovery Plan, Live, 224 day(s) remaining), Operations (Business Recovery Plan, In Progress, 99 day(s) overdue).
- My Exercises:** A table with columns: Name, Type, Status, SLA. One entry: Operations, Plan Walkthrough, Awaiting Development, 14 day(s) overdue.

Click on the entity name, which will take you into the entity and start the Review

N.B. Once a Review has been started, the questions are locked. If a Question Set is altered in anyway following the start of a Review, the changes are not reflected in that Review.

The entity status changes to 'Performing Review' and at the bottom of the left hand menu, a new section called 'Review' is added.

The screenshot shows the 'Performing Review' page for a Finance Business Recovery Plan. The left-hand menu has a 'Review' section highlighted. The main content area shows the following details:

- Name:** Finance
- Type:** Business Recovery Plan
- Geography:** Global
 - Region: Europe
 - Country: UK
 - City: Andover
 - Site: HQ
- Organisation:** Group
 - Business Area: Finance
 - Department: Not Selected
- Total Head Count:** 39
- Owner:** pbain
- Maintainers:** jbelshaw (Edit), wabbott (Edit), jjoslin (Edit)
- Approver:** dbridger
- Product & Service Set:** product set 1

Navigate through each section of the entity, making any necessary changes to the content.

The 'Review' section contains the questions form the Review Question Set associated with the entity template. Generic questions appear first, followed by the specific section questions. Comments can be added along with the upload of any supporting documents.

Section 39 of 39

Finance - Review - Performing Review

Create Incident

Field Changes

This Plan is currently being reviewed

General Question

Is this plan current? Please Select Please Select Browse...

Does this review meet our compliance needs? Please Select Please Select Browse...

Introduction

Are the objectives and assumptions specified valid? Please Select Please Select Browse...

Processes

Are RTOs documented in your plan realistic and meet business requirements? Please Select Please Select Browse...

When you have completed the review, click the 'Finish' button to send for approval.

Work Area Recovery

Has a recovery site been identified and detailed in your plan? Yes Please Select Browse...

Internal Contacts

Are internal contacts listed even for those that you require only in an emergency situation? Yes Please Select Browse...

Related Plans

Are the related plans relevant to this plan? Yes Please Select Browse...

For This Section **For This Plan** **Print**

Previous Save Finish This Plan

The questions in the Review section are all mandatory, should any have been missed the system will automatically prompt you. Click 'Cancel' to be returned to the Review section to complete the missing data.

Finance

The following questions have not been answered.

- Are RTOs documented in your plan realistic and meet business requirements?

Please complete the review section before continuing.

Cancel

Click 'Finish' again, when all questions have been completed and send the Review for approval

Finance

Thank you for making amendments to the review of Plan **Finance**. Do you wish to finalise these changes and submit them for approval by **dbridget**?

Finance

Thank you. The review of Plan **Finance** has been submitted to **dbridget** for approval.

2. Review Approval

On the Approvers homepage they will have a section for 'Outstanding Approvals' which lists any entity which is awaiting their approval.

Welcome

Outstanding Approvals

Name	Entity Type	Date Submitted	Status	SLA
Finance	Plan	19 Mar 2014 10:10 AM	Awaiting Review Approval	⚠ 9 day(s) remaining

My BIAS

My Plans

Name	Type	Live Date	Status	SLA
Commercial	Business Recovery Plan	07 Dec 2013 03:58 PM	Live	✅ 83 day(s) remaining
Crisis Management Team	Crisis Management Plan	07 Dec 2013 01:34 PM	Live	✅ 72 day(s) remaining
Finance	Business Recovery Plan	07 Dec 2013 03:59 PM	Awaiting Review Approval	⚠ 9 day(s) remaining

My Exercises

Name	Type	Status	SLA
Finance	Plan Walkthrough	In Progress	🕒 105 day(s) overdue

Click on the entity name, which will take you into the entity to approve the Review. As you navigate through the sections, you have the opportunity to add comments but are unable to edit the entity as you only see it in 'view only' mode.

Section 1 of 39

Finance - Introduction - Awaiting Review Approval

This Plan is currently being reviewed

Title

- 1 Purpose and Scope
- 2 Plan Use
- 3 Plan Copies
- 4 Continuity Strategy Summary
- 5 Assumptions
- 6 Maintenance and Updates

Approver Comments:

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In the Review section you will be able to see the answers given to the questions and download any supporting documents.

Related Plans

Are the related plans relevant to this plan? Yes N/A

Approver Comments:

Non-Conformance Comments:

B *I* U

Criticality:
Please Select ▼

Previous
Save Comments

Reject
Approve

Print

You can either 'Reject' the Review and send it back to the owner/maintainers for further work or 'Approve' the Review. Finish the approval by clicking 'Submit Changes' and make the entity 'Live'.

Finance

The review of Plan **Finance** requires approval. Do you wish to approve the review?

Submit Changes
Cancel

Finance

Thank you for approving the review of Plan **Finance**.

Close

Welcome

My BIAS

My Plans

Name	Type	Live Date	Status	SLA
Commercial	Business Recovery Plan	07 Dec 2013 03:58 PM	Live	✔ 83 day(s) remaining
Crisis Management Team	Crisis Management Plan	07 Dec 2013 01:34 PM	Live	✔ 72 day(s) remaining
Finance	Business Recovery Plan	19 Mar 2014 10:38 AM	Live	✔ 374 day(s) remaining

My Exercises

Name	Type	Status	SLA
Finance	Plan Walkthrough	In Progress	🔴 105 day(s) overdue

