Navigating the BIA: 3. Editing/updating a Local Process

Editing/updating a local process

1. To edit or update an existing process, open the list of current Local processes, go to the BIA module and click on Local Processes in the left-hand menu:

2. A list of your current Local Processes will appear on the right side of the screen. It will look something like this:

3. Double-click on a process name to view information about that process. The main screen for that process will appear. It will look something like this:
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From this screen, you can update any fields you wish.

4. To update the **Process Name**, click in the Local Process Name field and enter new information. This is a free text field; you may enter up to 250 characters.

5. To update the **Process Type**, click on the down-arrow for this field and select from the drop-down list. Like the BCP plans, Process Types are organized according to the BETH3 model (Buildings, Equipment, Technology, Human Resources, Third-party vendor/partner).
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Examples of typical processes in each of these types include:

- **Buildings**: the name of a particular facility, such as the Franklin Building
- **Equipment**: examples include Lab equipment or Transportation vehicles. Also, hard-copy documents are considered Equipment
- **Human Resources**: includes labor-based processes, such as Financial processing; Teaching; Conducting research
- **Technology**: includes both software and hardware **owned by your organization**. If it is a piece of technology owned by another organization in the University and your organization uses it, you do NOT enter it as a separate process; you will connect any processes that depend upon that technology to a Resource with the name of that technology (see #4, Creating a dependency, for instructions)
- **Third-party vendor/partner**: the name of a particular vendor, such as XYZ Supplies, Inc.

6. The **Recovery Time Objective (RTO)** asks the question: how long can we go without this process or system? For example, if you listed Penn 0365 as a critical Technology system, how long can you continue critical processes and functions without e-mail? To update the RTO, go to the name of the process at the top of the screen. Click on the down arrow next to the name. In the drop-down list, select RTO Assessment and then select ‘Edit RTO Assessment’.

This will then open the RTO Assessment page. At the bottom of the screen, click the button marked Manual Override RTO, and select one of the options from the drop-down list.
Here is some guidance for determining which option to select:

<table>
<thead>
<tr>
<th>Recovery Time Objective (RTO)</th>
<th>Considerations</th>
</tr>
</thead>
</table>
| Less than 1 hour              | • Health and human safety in jeopardy  
                                 | • Significant financial impact/cost  
                                 | • Significant research impact  
                                 | • Large number of transactions  
                                 | • Date/time highly sensitive  
                                 | • No ability for workarounds   |
| Up to 4 hours                 | • Significant impact on critical processes  
                                 | • Large number of dependent processes or systems  
                                 | • Significant disruption to operations  
                                 | • Limited ability for workarounds |
| Up to 1 day                   | • Frequent usage/large user base  
                                 | • Important time-based constraint  
                                 | • Limited ability for workarounds |
| Up to 3 days                  | • Some workarounds available  
                                 | • Moderate number of transactions |
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<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>• Limited user base</td>
</tr>
<tr>
<td>Up to 1 week</td>
<td>• Process or system with limited scope</td>
</tr>
<tr>
<td></td>
<td>• Not time sensitive</td>
</tr>
<tr>
<td></td>
<td>• Workarounds available</td>
</tr>
<tr>
<td>Greater than 1 week</td>
<td>• Process or system with few or no dependencies</td>
</tr>
<tr>
<td></td>
<td>• Workarounds easily available</td>
</tr>
<tr>
<td></td>
<td>• Infrequent occurrence</td>
</tr>
</tbody>
</table>

7. The **Recovery Point Objective (RPO)** reflects how much data you can afford to lose in an IT system as a result of an outage or disruption. **NOTE:** RPO is only used for Technology items a process depends upon.

To update the RPO, open one of your Local processes.

Open the tab called BAU Requirements.

Go to Search and Browse, and search for the name of the IT system on which this process depends, and for which you want to set the RPO. Using Select one, select External Process, then use Name and contains, to find the IT system on which this process depends.
Drag and drop that IT system name into BAU Requirements.

A pop-up box will appear. Go to the option named, Enter your required RPO, and select an item from the drop-down list.
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BAU Requirements for PennO365

Please describe your reliance on PennO365

Enter your required RTO for PennO365

Enter your required RPO for PennO365

Enter any manual workaround solutions you can adopt if PennO365 was unavailable

Be sure to Save before leaving the pop-up page, and then Save again before leaving the Local process screen.

8. To update the Overview field, click on the General Information tab, then click in the Overview field and enter new information. This is a free text field; you may enter up to 4,000 characters.
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9. The Owner field must contain the name of an individual member of the Penn community. To clear out the name of the current person listed in the field, click on Clear next to the red button.

To enter a new person's name, go to Search and Browse.

From the drop-down list called Select one, select Contact.

In the First name field, enter a person's first name. From the Select one field below First name, select AND. When a new field appears, from the drop-down list, select Last name.
10. Then click Search. To clear out the name of the current person listed in the field, click on Clear next to the red button.

Once the field is empty, drag and drop the new name from Search and Browse into the Owner field.
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11. The **BAU location** field (BAU stands for Business as usual) should be populated consistently with the Building Assets list in Shadow-Planner. Using Search and Browse (see above), from the Select one drop-down list, select Asset. Then search on the name of the building.

In the BAU Location field, enter the name of the building as it appears in the Asset list.

12. To update the **Business hours** field, click in the field and enter new information. This is a free text field; you may enter up to 250 characters.

13. To update the **Business peaks** field, click in the field and enter new information. Please enter one of the following items:
   - Specific time of week
   - Specific time of month
   - Specific time of year
   - More than 1 of these
   - None of these
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"None of these" is for processes that are steady throughout the year.

14. To update the **Date last tested** field, use the calendar to select the date of your organization’s most recent tabletop or disaster recovery exercise.

![Date last tested](2017-11-16)

The field for the time on that date may be left blank.

![Date last tested](2017-11-16 0:00:00)

15. Like the BAU location field, the **Recovery location** field should be populated consistently with the Building Assets list in Shadow-Planner, if the recovery location is an on-campus facility (see #10 above for instructions for doing this).

If not, since this is a free text field (character limit: 4000), you may enter the name of an off-campus location, or other text such as, “Work remotely.”

![Recovery location](Work remotely)

16. To update the **Process availability** field, click in the field and enter new information. This is a free text field; you may enter up to 4,000 characters.

![Process availability](Available during normal business hours)

17. To update the **Mission type** field, use the drop-down list to select one of the items.

![Mission type dropdown](Operations/Admin, Education/Teaching, Research, Service, Clinical)

18. To update the **Life dependencies** field, use the drop-down list to select one of the items.
19. To update the *Breadth of impact* field, use the drop-down list to select one of the items.