



**SUNGARD** AVAILABILITY SERVICES

# Understanding your PLANet Resources

**Jennifer Truex, ABCP, Product Manager**

**Jodi Bell, ABCP, Senior Product Specialist**

**SunGard Availability Services**

[www.sungardas.com](http://www.sungardas.com)



# Agenda

- What is new in the PLANet community?
- Mysungardcms.com Overview
- PLANet Regional User Group
- PLANet Technical Advisory Group
- SunGard Software Support Overview
- Frequently Asked Support Questions

**PLANet**<sup>®</sup>



# Goal of this session.....

- SunGard is committed to the success of you and your planning efforts.
- We are continuing to provide Business Continuity Education to supplement the benefits of using PLANet.
- Through Support, Training and Forums such as this, you are able to learn and share with others as you manage your continuity programs.
- Sit back and let us show you how!

# What is new in the PLANet Community?

- Training Improvements
  - Referring back to the Project Plan for each class.
  - Using WebEx Polls to facilitate interaction.
- New Documentation
  - PLANet Best Practices Guide
    - ◆ Based on the PLANet Project Plan
    - ◆ Expands each step that is product related to include the training class and user guide chapter that covers the topic.
- Review of [mysungardcms.com](http://mysungardcms.com)
  - ◆ Education
  - ◆ Events - 2009 UGF Information
  - ◆ Much more!



# Samples of Training Tools

**SUNGARD®** Keeping People and Information Connected.  
Availability Services



## PLANet® Business Continuity Planning Project Plan

BCP Project Phase	Action Items	Date for Completion
Project Initiation	1. Identify key personnel for BC Planning Team	
	2. Familiarize key managers and participants with the planning process and resource requirements	
	3. Define terms, objectives, assumptions to be used in Global Decisions	
	4. Provide roadmap of the project with milestones	
	5. Attend PLANet training sessions. Training may be attended by the entire recovery team or by primary plan administrator who then trains others. Courses and schedules found on MyStrohl.com	
	6. Develop policy statement and distribute to employees	
Manage Data Dictionaries	1. Review and discuss available dictionaries for imports (Core Components, Logistics, Resources, People)	
	2. Review, discuss, construct imports from other data sources to implement into PLANet	
	3. Import or manually enter data into appropriate Dictionary	
Administrative Tasks	1. Create user accounts	
	2. Create and manage plans (Professional License Only)	
	3. Customize screens (Professional License Only)	
Making Global Decisions	1. Review and discuss employees authorized to declare a disaster (Global, Branch, Department, Information Services)	
	2. Complete criteria for declaring a disaster	
	3. Complete Plan Administrator information	
	4. Set plan details (Objectives, Strategies, Scope, Assumptions)	
Risk Analysis	1. Review Risk Assessment	
	2. Identify threats to the organization. Add and/or delete threats as needed	
	3. Assess probability, speed of onset, estimated duration, and impact of each threat	
	4. Eliminate threats, if possible	
	5. Identify effective controls to reduce risks	



# PLANet Best Practices Guide

- Based on PLANet Project Plan
- Expanded detail for steps related to the tool
- Can be used for new and existing implementations



## **PLANet Best Practices Guide**



# *mysungardcms.com*

- Support – Techie Emails
  - Documentation
- Education
- Events
  - Webinars – we welcome ideas for new sessions! Examples of past events.....
    - BCP 101
    - Pandemic Planning
    - Changes to FFIEC Requirements
  - User Group Information
  - TAG



***Log into [mysungardcms.com](http://mysungardcms.com)***



***More information on SunGard Business  
Continuity Software***

***International User Group Forum***

***and***

***PLANet's***

***Regional User Groups***



# SunGard BC Software International User Group Forum

- SunGard Availability Services encourages all of its users to help shape the future of our products and services.
- Users can accomplish this by participating in regional user groups (RUGs) and the SunGard BC Software International User Group Forum.
- SunGard and the User Group Advisory Board works hard to compile a roster of sessions for the UGF that educate, intrigue and motivate attendees.
- April 17 to 20<sup>th</sup> – 2011 UGF in San Diego



# SunGard BC Software International User Group Forum

- 90 percent of all UGF presentations are offered by Users
- Networking
  - The key to the UGF
  - Welcome Reception/Evening Events
  - Birds of a Feather Roundtable Discussions
  - Tuesday Main Event
- Special Events
  - Training
  - New Attendees Orientation
  - PLANet Reception



# SunGard PLANet Virtual Regional User Group Meetings (RUGS)

- Our Regional User Groups (RUGs) provide users with the opportunity to talk about how they use SunGard Availability Services BC software and services, and to share planning experiences.
- RUGs also provide a unified forum to develop requirements for enhancements and new product offerings to send back to SunGard.
- RUGs are user-driven but supported by SunGard Availability Services



# SunGard PLANet Virtual Regional User Group Meetings (RUGS)

- Virtual RUGS are hosted by SunGard for our PLANet User Community
  - Three hour Webex sessions that offer sessions on new enhancements and important product-driven presentations
  - Users also offer case studies/best practices sessions
  - Technical Roundtable hosted by SunGard development/customer support staff
- 2010 PLANet Virtual RUGS
  - Wednesday, October 6 at 2 pm - Northeast/Southeast
  - Monday, October 18 at 2 pm - Midwest
  - Tuesday, October 19 at 10 am West Coast including Southwest
- Agenda and registration details coming in August

# PLANet Regional User Group information from 2009

- **2009 PLANet Virtual Regional User Group Information-** presentation and notes on mysungardcms.com

<https://www.mysungardcms.com/Events/RUGs/PLANetRUG.asp>

- June 16, 2009 - East Coast
- June 18, 2009 - Southwest
- June 24, 2009 - West Coast
- June 26, 2009 - Midwest





# *What is PLANet's Technical Advisory Group?*

# PLANet Technical Advisory Group (TAG)

- TAG is a think tank of users who are deeply involved in the use of SunGard's BC software products.
- TAG serves as a forum for expressing, documenting and reviewing software needs.
- PLANet has five client representatives on the TAG.





# Meet the SunGard Software Support Team

- Our Software Support Team is here to answer your questions
  - Product Functionality
  - Technical Issues or Questions
  - Enhancement Suggestions
  - Problem Reporting
- Contact Support 24 hours a day any day of the year – how???

# Support Contact Methods

- **24x7x365 Technical Support –**
  - **as.softwaresupport@sungard.com**
  - **(800) 478-7645**
- **Support Business Hours**
  - 7 am to 7 pm EST M-F
  - All US Holidays are staffed except Dec. 25th
- **After Hours Support**
  1. Call Support Line
  2. Press ONE
  3. Leave Message
  4. On-call will respond



# SunGard Software Support Team Tells All.....



- What are some of the frequently asked questions from PLANet users?
  1. What is the Filter message that appears each time I run a report?
  2. Why do some report ask me to select a Plan while some do not?
  3. How do I move a Process and the assignments from one plan to another?
  4. What is the relationship between Processes, Tasks and Teams Roles?
  5. What is the easiest way to see everywhere that a record is assigned in my plans?
  6. How can I automate call lists?
  7. How can I stop the .Net message from appearing?



# FAQ #1 – Filter Message

- When running a report in PLANet, it prompts me with this screen. What is the purpose of this?

View Report

Choose or create a filter, or select all records.

Select All Data  
 Select Data Filter

Filter Name	Description	Is Private?
Critical Process...		<input type="checkbox"/>
Pro Act Plan Fil...		<input type="checkbox"/>

Filter Details

Created on: 5/12/2009 2:37:26 PM by: admin  
Last Updated on: 5/12/2009 2:37:26 PM by: admin

Filter Details

\* Filter Name: Critical Processes Is Private?   
Description:

Filter Conditions

Meets Any Condition  Meets All Conditions Clear

Field	Operator	Value	
Critical Rating	=	1 (greatest impact)	<input type="checkbox"/>

<< < > >> Record 1 of 2

< Back Next > Run Report Cancel

## Process Action Plan

### Branch Recovery - Main Street

4/7/2010

Process - ATM Restoration (PCS0000020)

Critical Rating - 1

RTO (Hours) - 2.00

RPO (Hours) - 2.00

Task - ATM Restoration

Restore ATM

Task Owner(s) Branch Manager (Branch Recovery)

<u>Seq.</u>	<u>Subtask / Action</u>				
1	<p>Remove the currency, deposits, payments, and audit trail from the ATM unit.</p> <p>Remove the currency, deposits, payments, and audit trail from the ATM unit.</p> <table><thead><tr><th><u>Assigned Roles</u></th><th><u>People</u></th></tr></thead><tbody><tr><td>Branch Manager (Branch Recovery)</td><td>Bell, Dina (E)</td></tr></tbody></table>	<u>Assigned Roles</u>	<u>People</u>	Branch Manager (Branch Recovery)	Bell, Dina (E)
<u>Assigned Roles</u>	<u>People</u>				
Branch Manager (Branch Recovery)	Bell, Dina (E)				
2	<p>Secure the currency by placing in the bank vault.</p> <p>Secure the currency by placing in the bank vault.</p> <p>An armored car service may be required to transport currency to a vault or safe, especially if the currency must be transported from a remote location to a branch facility or from one branch facility to another.</p> <table><thead><tr><th><u>Assigned Roles</u></th><th><u>People</u></th></tr></thead><tbody><tr><td>Branch Manager (Branch Recovery)</td><td>Bell, Dina (E)</td></tr></tbody></table>	<u>Assigned Roles</u>	<u>People</u>	Branch Manager (Branch Recovery)	Bell, Dina (E)
<u>Assigned Roles</u>	<u>People</u>				
Branch Manager (Branch Recovery)	Bell, Dina (E)				
3	<p>Contact the information systems department or ATM service provider to report the ATM as out of service.</p> <p>Contact the information systems department or ATM service provider to report the ATM as out of service. The information systems department or ATM service provider will flag the ATM terminal as unavailable. If the ATM terminal is not flagged as down, the processing system will continually indicate a communication problem.</p> <table><thead><tr><th><u>Assigned Roles</u></th><th><u>People</u></th></tr></thead><tbody><tr><td>Branch Manager (Branch Recovery)</td><td>Bell, Dina (E)</td></tr></tbody></table>	<u>Assigned Roles</u>	<u>People</u>	Branch Manager (Branch Recovery)	Bell, Dina (E)
<u>Assigned Roles</u>	<u>People</u>				
Branch Manager (Branch Recovery)	Bell, Dina (E)				
4	<p>Contact the ATM vendor and request a technician to assist in damage assessment of the ATM.</p> <p>Contact the ATM vendor - Diebold - and request a technician to assist in damage assessment of the ATM. The technician will indicate if the ATM unit can be repaired or if it must be replaced.</p> <table><thead><tr><th><u>Assigned Roles</u></th><th><u>People</u></th></tr></thead><tbody></tbody></table>	<u>Assigned Roles</u>	<u>People</u>		
<u>Assigned Roles</u>	<u>People</u>				



## FAQ #2 – Plan Specific Reports

*Dictionary Reports*

versus

*Plan Specific?*

# Report Content

**Vital Record in Plan Details**  
**Operations Recovery**  
1/31/2008

planetprocu1  
Business Continuity Plan

Report Description:  
This report list all the characteristics of each Vital Record organized by record name.

**Copies of critical operations manuals (VRC0000034)**  
Number of Core Components that use this vital record: 1  
[Dictionary Information](#)  
Vital Record Type Books/Refs  
[Plan Specific Information](#)  
Process - Wire Transfer Restoration (Deposit Operations)

**FEDLINE Encryption Cards (VRC0000038)**  
Number of Core Components that use this vital record: 1  
[Dictionary Information](#)  
Description Encryption Documentation for FEDLINE  
Vital Record Type Books/Refs  
[Plan Specific Information](#)  
Process - Wire Transfer Restoration (Deposit Operations)

**Forms Manual (VRC0000040)**  
Number of Core Components that use this vital record: 1  
[Dictionary Information](#)  
Description Forms and Stamp Grids  
Vital Record Type Books/Refs  
Media Type Paper/Hardcopy  
[Plan Specific Information](#)  
Process - Wire Transfer Restoration (Deposit Operations)

**Mobile Recovery Unit Agreement (VRC0000015)**  
Number of Core Components that use this vital record: 1  
[Dictionary Information](#)  
Vital Record Type Svc Agreements/Contracts  
[Plan Specific Information](#)  
Process - Wire Transfer Restoration (Deposit Operations)

This report lists all Vital Records within a *plan*, sorted *alphabetically* with *Dictionary* and *Plan Specific details*.

Plan Specific Information shows that the Process *Wire Transfer Restoration* requires the *Copies of Critical Operations Manuals* Vital Record.

# Report Content

## Vital Record Details

planetprocu1

1/31/2008

Business Continuity Plan

### Report Description:

This report list all the characteristics of each Vital Record organized by record name.

### Copies of critical operations manuals (VRC0000034)

Vital Record Type	Books/Refs
Department	Operations
In Emergency Response Kit?	No

### FEDLINE Encryption Cards (VRC0000038)

Description	Encryption Documentation for FEDLINE
Vital Record Type	Books/Refs
Department	Operations
In Emergency Response Kit?	No

### Forms Manual (VRC0000040)

Description	Forms and Stamp Grids
Vital Record Type	Books/Refs
Department	Global Plan Administrator
Media Type	Paper/Hardcopy
In Emergency Response Kit?	Yes

### Mobile Recovery Unit Agreement (VRC0000015)

Vital Record Type	Svc Agreements/Contracts
In Emergency Response Kit?	No

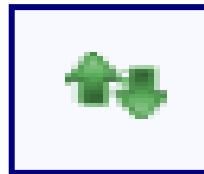
### Security Codes (VRC0000045)

Description	List of Security Codes for Emergency Use
Vital Record Type	Records
Department	Security
In Emergency Response Kit?	No

Vital Records Details: The same report, but not *plan specific*. Lists all *Vital Records* in the *Dictionary*.

## FAQ #3 – Moving a Process

- Can I move a Process and the assignments from one plan to another?
  - Within Build Plans, open the plan where the process is currently assigned.
  - Click the arrows as shown here and follow the instructions on the screen.





# Start with your Processes

 **Define Recovery Processes from Library**

Add existing recovery scripts to your plan. Or create your own processes and assign people, locations, and resources to each. Review and approve each process and its assignments.

 **Add and Modify Recovery Resources**

Record information about your locations, vendors, and recovery resources. Identify items in your emergency response kit.

 **Enter My Employees into PLANet**

Enter details about your employees so that you can add them to your emergency call chains. Using the Attributes feature, inventory the skills of each employee so that you can assign them to appropriate team roles later on.

 **Build Recovery Teams**

Assign employees to specific roles within the disaster recovery team structure.

 **Build Emergency Call Lists**

Emergency call lists ensure you can notify all of your staff quickly, even if an incident occurs outside of business hours.

# How to Move a Process to another Plan

Home >> **Loan Operations (Build Plan)** >> Define Processes to Recover >> Modify Processes and Assignment to Processes

Assigned | All

	Process ID	Process/Function Name	Business Function
<input checked="" type="checkbox"/>	PCS0000029	Consumer Loan File Damage Assessment	Consumer Loans
<input checked="" type="checkbox"/>	PCS0000031	Consumer Loan Origination and Servicing	Consumer Loans
<input checked="" type="checkbox"/>	PCS0000038	Credit Card Restoration	Consumer Loans
<input checked="" type="checkbox"/>	PCS0000040	Merchant Services	Consumer Loans
<input checked="" type="checkbox"/>	PCS0000041	Student Loans	Consumer Loans
<input checked="" type="checkbox"/>	PCS0000059	Wire Transfer Restoration	Deposit Operations

Process Details | Additional Details | Dependency Summary | Dependency Map

Created on: 1/29/2010 1:30:06 PM by: admin  
Last Updated on: 1/29/2010 1:30:06 PM by: admin

Process Details

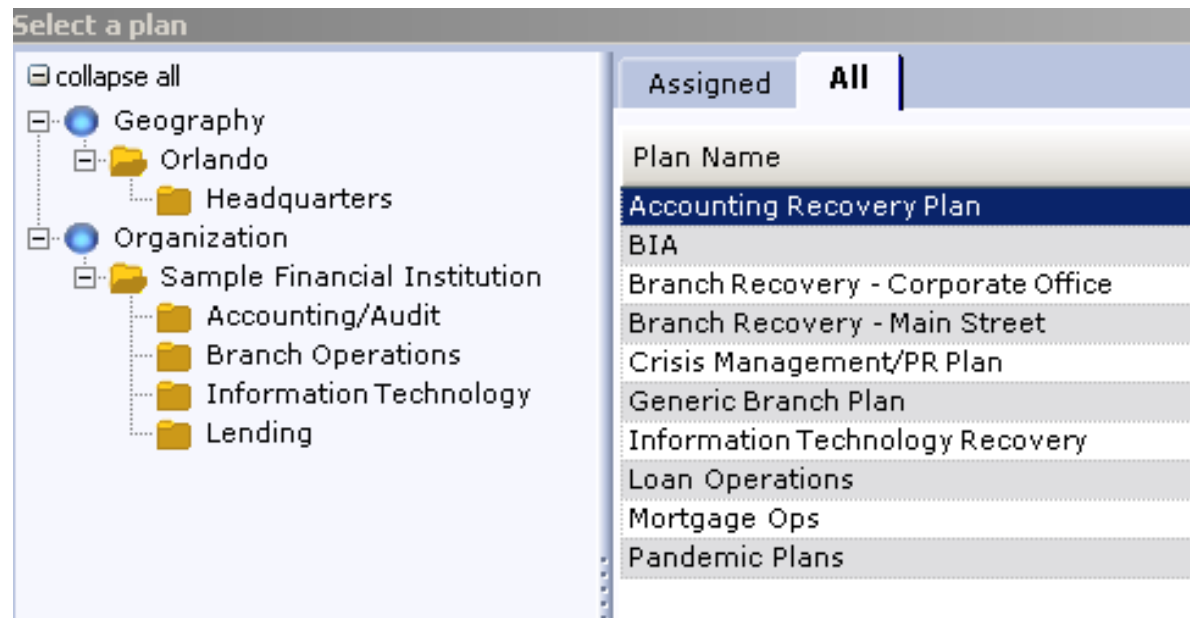
\* Process ID:

\* Process/Function Name:

Business Function:  Add

Approved:

# Select the Destination Plan



*Select the Plan to which you want to move the Process and click ok. The Process and ALL of its assignments will be moved.*



## FAQ #4 – Processes, Tasks and Team Roles

- Relationship between **Processes**, **Tasks** and **Team Roles**?
  - Remember that **Tasks** are assigned to **Roles**.
  - Assigning Employees to **Roles** is accomplished through the Teams area.
  - A powerful report to display these relationships is the Process Action Plan Report.



# Start with your Processes

 **Define Recovery Processes from Library**

Add existing recovery scripts to your plan. Or create your own processes and assign people, locations, and resources to each. Review and approve each process and its assignments.

 **Add and Modify Recovery Resources**

Record information about your locations, vendors, and recovery resources. Identify items in your emergency response kit.

 **Enter My Employees into PLANet**

Enter details about your employees so that you can add them to your emergency call chains. Using the Attributes feature, inventory the skills of each employee so that you can assign them to appropriate team roles later on.


 **Build Recovery Teams**

Assign employees to specific roles within the disaster recovery team structure.

 **Build Emergency Call Lists**

Emergency call lists ensure you can notify all of your staff quickly, even if an incident occurs outside of business hours.

# Assigning Tasks and Resources to Processes

**PLANet**  **STROHL SYSTEMS**

Home >> PLANet (Build Plan) >> Define Processes to Recover >> Modify Processes and Assignment to Processes

Assigned | All

Process ID	Business Function	Business Function	Approved
<input checked="" type="checkbox"/> PCS0000020	ATM Restoration	Deposit Operations	<input type="checkbox"/>
<input checked="" type="checkbox"/> PCS0000025	Employee Safety	Human Resources	<input type="checkbox"/>
<input checked="" type="checkbox"/> PCS0000037	Cash Management...	Commercial Loans	<input type="checkbox"/>
<input checked="" type="checkbox"/> PCS0000046	Accounting Restor...	Accounting	<input type="checkbox"/>
<input checked="" type="checkbox"/> PCS0000059	Wire Transfer Res...	Deposit Operations	<input type="checkbox"/>

**Process Details** | Additional Details | Dependency Summary | Dependency Map

Created on: 10/29/2007 10:26:22 AM by: admin  
Last Updated on: 12/19/2007 11:20:53 AM by: admin

**Assign Items to Process**

Process Details

\* Process ID: PCS0000020

\* Business Function: ATM Restoration

Business Function: Deposit Operations

Approved:

Description: This section details the steps needed to restore the services provided by the ATM

Summary:

Record 1 of 5 Search for: in

Progress:   This step is complete

**Modify Processes and Assignment to Processes**

If a business process fails, or if it is interrupted or delayed by a disruption, there could be negative consequences for your business. If a process requires special steps to recover it during a disruption, assign it to your plan.

1. List all business processes for which your unit is directly responsible, or in which it plays a key role in company operations.
2. Assign these Processes to your plan.
3. Click the Assign Dependencies button to choose any other Processes or Applications, on which each Process depends.
4. Highlight an assigned Process and click the Open Process button to assign Resources and People required to recover each Process.

About Dependencies

Some processes can only be restored after one or more other processes or applications are restored. In business continuity planning, this inter-relationship is called a dependency. A process can be dependent on an application or another process.

Applications encompass any software that is complex enough to require substantial intervention by someone who is trained in the use and implementation of the application.

# Modify Processes & Assignments to Processes

- Assign Tasks and Roles**  
Specify the Tasks that must be performed in order to recover this Process, and identify the Roles that will perform recovery Tasks.
- Assign Software**  
Assign any Software that works in conjunction with or in support of this Process.
- Assign Locations**  
Specify the Locations that are used to perform this Process, or that will be used to recover it.
- Assign Telecom**  
Assign any Telecom item that works in conjunction with or in support of this Process.
- Assign Service Agreements and Contracts**  
Identify the Vendor Service Agreements you have to support or recover this Process.
- Assign Vital Records**  
Choose the Vital Records that are necessary to recover this Process.
- Assign Documents**  
Choose the Documents that are necessary to recover this Process.
- Assign Equipment**  
Assign any Equipment that works in conjunction with or in support of this Process.
- Assign Supplies**  
Identify any Supplies necessary to recover or perform this Process.

# Tasks and Subtasks

- ATM Restoration:
  - Task & Subtasks
    - A task is the goal that we want to accomplish
    - The Subtasks are the steps to accomplish that goal

Subtask ID	Seq #	Subtask Name
STK0000066	1	Clear ATM unit
STK0000067	2	Secure currency
STK0000068	3	Report ATM out-of-service
STK0000069	4	Request ATM vendor service
STK0000070	5	Report assessed damages
STK0000071	6	Contact ATM vendor
STK0000072	7	Process ATM transactions
STK0000073	8	Schedule ATM repairs
STK0000074	9	Establish ATM communications
STK0000075	10	Establish ATM alarm service
STK0000076	11	Order replacement ATM
STK0000077	12	Order ATM software
STK0000078	13	Provide new ATM unit specs
STK0000079	14	Obtain equipment and supplies
STK0000080	15	ATM service restoration notification

Tasks and Subtasks associated with this Process

# Tasks & Subtasks – who should perform them?

- ATM Restoration:
  - Task & Subtasks
    - A task is the goal that we want to accomplish
    - The Subtasks are the steps to accomplish that goal

Subtask ID	Seq #	Subtask Name
STK0000066	1	Clear ATM unit
STK0000067	2	Secure currency
STK0000068	3	Report ATM out-of-service
STK0000069	4	Request ATM vendor service call
STK0000070	5	Report assessed damages
STK0000071	6	Contact ATM vendor
STK0000072	7	Process ATM transactions
STK0000073	8	Schedule ATM repairs
STK0000074	9	Establish ATM communications
STK0000075	10	Establish ATM alarm service
STK0000076	11	Order replacement ATM
STK0000077	12	Order ATM software
STK0000078	13	Provide new ATM unit specs
STK0000079	14	Obtain equipment and supplies
STK0000080	15	ATM service restoration notification

**Click here to assign the Subtasks to a Role**

Modify Assignments



# Assigning Individuals to the Team Roles

**Define Recovery Processes from Library**

Add existing recovery scripts to your plan. Or create your own processes and assign people, locations, and resources to each. Review and approve each process and its assignments.

**Add and Modify Recovery Resources**

Record information about your locations, vendors, and recovery resources. Identify items in your emergency response kit.

**Enter My Employees into PLANet**

Enter details about your employees so that you can add them to your emergency call chains. Using the Attributes feature, inventory the skills of each employee so that you can assign them to appropriate team roles later on.

**Build Recovery Teams**

Assign employees to specific roles within the disaster recovery team structure.

**Build Emergency Call Lists**

Emergency call lists ensure you can notify all of your staff quickly, even if an incident occurs outside of business hours.

# What Role Performs Each Task/Subtask

Team ID	Team Name	Description
TEA0000090	Branch Administration	

Role Name	Priority	Critical
<input checked="" type="checkbox"/> Branch Administration Team Leader		
<input checked="" type="checkbox"/> Branch Manager		

Team Name and Description

Team Details | **Role Details** | Plan Specific Task Specific Position Details

Created on: **10/29/2007 10:26:24 AM** by: **admin**  
 Last Updated on: **10/29/2007 10:26:24 AM** by: **admin**  
 Critical: Indicate whether this position is critical to recovery.

\* Role Name:

Description:

Approval Limit:  Priority:  Critical:

**Additional Details**

Crisis Responsibilities:
 

- Continuously collects and reviews updates and changes to community office and branch functions
- Provides updates and changes to the Plan Administrator for input into the PLANet business continuity plan

Potential Sources of Staffing:
 

- Branch Administrator - Oversees the community office and branch functions on the senior management level
- Retail Banking Officer - Oversees the community office and branch functions under the direction of executive management

Special Considerations:
 

- Understands the operations and functions of a community office
- Ability to coordinate and complete functions assigned to them
- Ability to delegate tasks to assigned personnel
- Ability to handle pressure

Team Role

# Assigning Employees/Vendor Reps to the Role

**Team assigned to the task**

Team ID	Team Name	Description
TEA0000090	Branch Administration	

Role Name	Priority	Critical
<input checked="" type="checkbox"/> Branch Administration Team Leader		
<input checked="" type="checkbox"/> Branch Manager		

**Team Role**

\* Role Name:

Description: Typically responsible for the recovery of community office operations should a disaster destroy a branch office or disrupt communications from the core processing system. Confers regularly with Plan Administrator to ensure channels

Approval Limit:  Priority:  Critical:

**Additional Details**

Crisis Responsibilities:

- Continuously collects and reviews updates and changes to community office and branch functions
- Provides updates and changes to the Plan Administrator for input into the PLANet business continuity plan

Potential Sources of Staffing:

- Branch Administrator - Oversees the community office and branch functions on the senior management level
- Retail Banking Officer - Oversees the community office and branch functions under the direction of executive management

Special Considerations:

- Understands the operations and functions of a community office
- Ability to coordinate and complete functions assigned to them
- Ability to delegate tasks to assigned personnel
- Ability to handle pressure

**Click here to assign people to the Roles**

**Modify Assignments**

## Process Action Plan

### Branch Recovery - Main Street

4/7/2010

Process -  
RTO (Ho

***End Result is a Recovery Script you can really use during an event or test –***

Critical Rating - 4

Task - /  
Restore

***The Process Action Plan Report***

Task Owner(s) Branch Manager (Branch Recovery)

<u>Seq.</u>	<u>Subtask / Action</u>
-------------	-------------------------

- |   |                                                                                                                                   |
|---|-----------------------------------------------------------------------------------------------------------------------------------|
| 1 | Remove the currency, deposits, payments, and audit<br>Remove the currency, deposits, payments, and audit trail from the ATM unit. |
|---|-----------------------------------------------------------------------------------------------------------------------------------|

<u>Assigned Roles</u>	<u>People</u>
Branch Manager (Branch Recovery)	Bell, Dina (E)

- |   |                                                                                                                                                                                                                                                                                                                               |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 | Secure the currency by placing in the bank vault.<br>Secure the currency by placing in the bank vault.<br>An armored car service may be required to transport currency to a vault or safe, especially if the currency must be transported from a remote location to a branch facility or from one branch facility to another. |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

<u>Assigned Roles</u>	<u>People</u>
Branch Manager (Branch Recovery)	Bell, Dina (E)

- |   |                                                                                                                                                                                                                                                                                                                                                                                            |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3 | Contact the information systems department or ATM<br>Contact the information systems department or ATM service provider to report the ATM as out of service.<br>The information systems department or ATM service provider will flag the ATM terminal as unavailable. If the ATM terminal is not flagged as down, the processing system will continually indicate a communication problem. |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

<u>Assigned Roles</u>	<u>People</u>
Branch Manager (Branch Recovery)	Bell, Dina (E)

- |   |                                                                                                                                                                                                                                                         |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4 | Contact the ATM vendor and request a technician to<br>Contact the ATM vendor - Diebold - and request a technician to assist in damage assessment of the ATM.<br>The technician will indicate if the ATM unit can be repaired or if it must be replaced. |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

<u>Assigned Roles</u>	<u>People</u>
-----------------------	---------------



## FAQ #3 – How can I see where this is assigned?

- How can I see everyplace that a record is assigned within my plans?
  - The Related Records function will provide this information.
  - Related Records can be viewed from a Dictionary screen or from within Build Plans.
  - You can perform replace, delete or simply un-assign from within Related Records.

# How to find “Related Records”

Home >> [Manage PLANet Data Dictionaries](#) >> [Manually Update Data](#)

**Employee**

**Employee Details** | Attribute Summary

Created on: **6/19/2007 2:21:52 PM** by: **admin**  
Last Updated on: **1/12/2010 3:12:49 PM** by: **admin**

Employee Details

\* Employee ID:  Emergency:   
\* First Name:  \* Last Name:   
Title:  Department:   
Picture:

Employee Address

Street Address:   
Address 2:   
City:   
State/Province:  ZIP/Postal Code:

# Using Related Records

**Employee Details**

\* Last Name:   
\* First Name:

**Plan records assigned to base Employee**

**Plan**

Plan Name	Plan ID
Accounting Reco...	PLN0000001

**Plan Details** | Additional Employee Details

Created on: **4/16/2007 6:29 PM** by: **admin**  
Last Updated on: **1/14/2010 4:01 PM** by: **admin**

\* Plan ID:   
\* Plan Name:   
Business Function:

Record 1 of 1.

*You can delete or replace globally or simply unassign*

Entire Record Detail

Related Records

- Plan-Related
  - General Recovery
    - (Assigned)
  - Call List
    - CallListPosition\_Person
- Dictionary
  - People
  - Attribute
  - Logistics
    - Location



## FAQ #6 – Can I automate my Call Lists?

- Now that we have our Call Lists defined, is there any way to blast out messages to everyone on one or more Call Lists?
  - Available with PLANet Notification
  - Let's see how it works!



# Creating and Maintaining Call Lists

**Define Recovery Processes from Library**

Add existing recovery scripts to your plan. Or create your own processes and assign people, locations, and resources to each. Review and approve each process and its assignments.

**Add and Modify Recovery Resources**

Record information about your locations, vendors, and recovery resources. Identify items in your emergency response kit.

**Enter My Employees into PLANet**

Enter details about your employees so that you can add them to your emergency call chains. Using the Attributes feature, inventory the skills of each employee so that you can assign them to appropriate team roles later on.

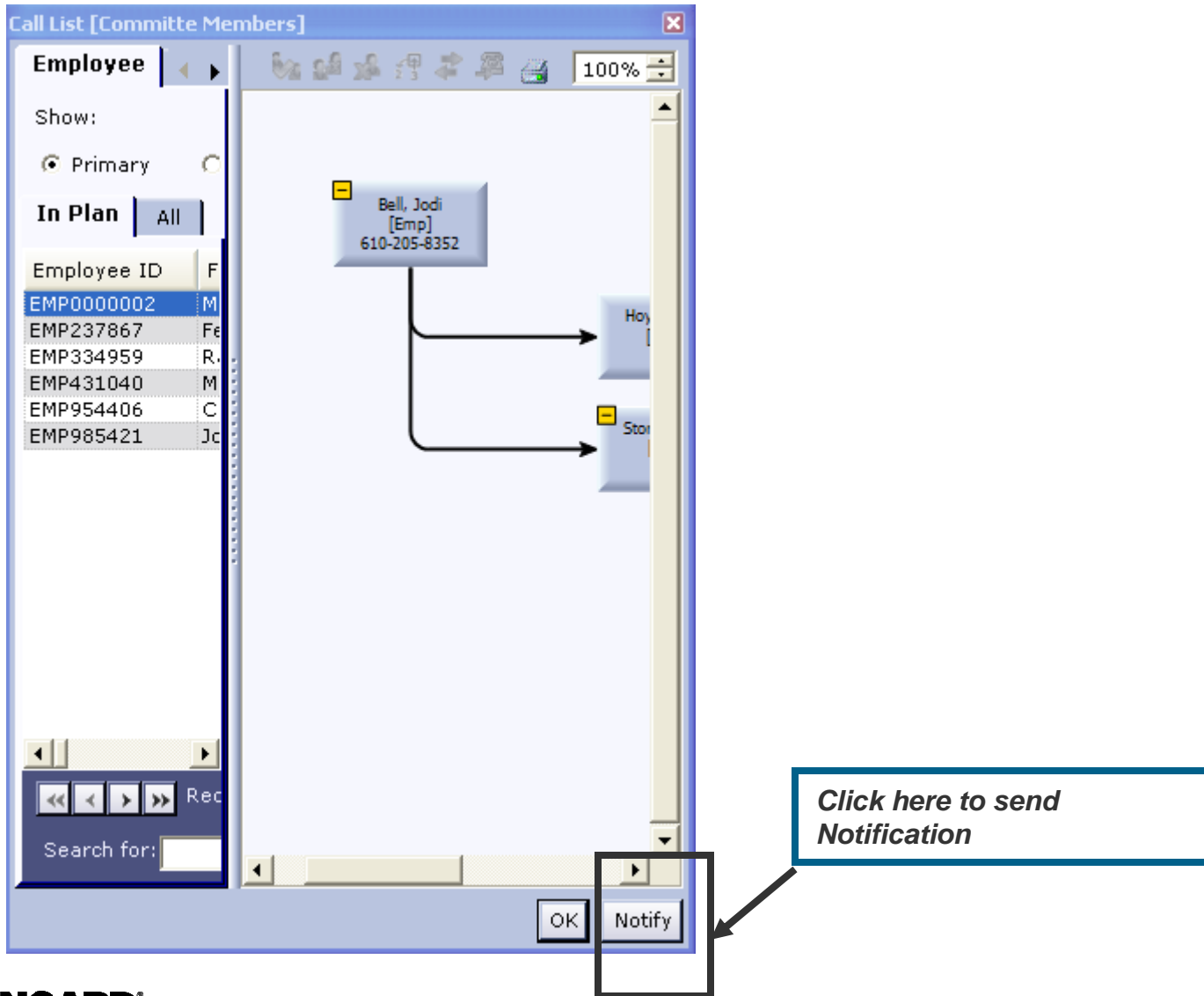
**Build Recovery Teams**

Assign employees to specific roles within the disaster recovery team structure.

**Build Emergency Call Lists**

Emergency call lists ensure you can notify all of your staff quickly, even if an incident occurs outside of business hours.

# Click to “Notify” from within the Call List Screen





## FAQ #7 – .Net Error Message Appears

- Whenever I click in certain screens, a message appears and it blocks what I need to read!
  - Taking a few very simple steps will stop this message from occurring.
  - It is workstation specific, so all users would need to perform these steps.

## Eliminating .Net Message

If you are getting the below message occasionally in PLANet, follow these steps to add PLANet to your trusted sites.



### Microsoft .NET Security Warning

Never enter personal information or passwords into a window unless you can verify and trust the source of the request.

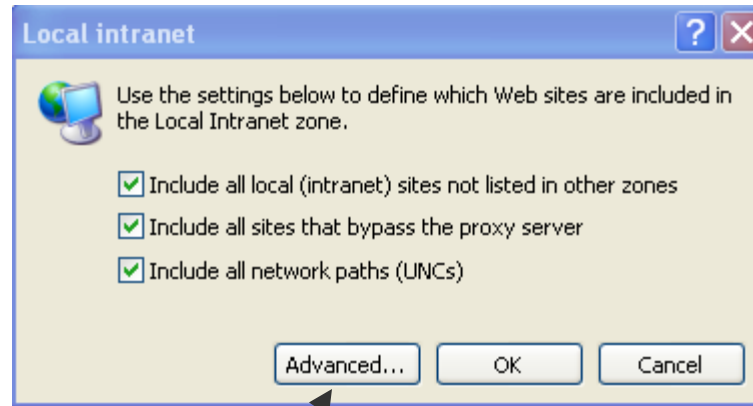
1. Go to Internet Explorer.
2. Click on the Tools Menu and pick Internet Options.
3. Click on the Security Tab and you will now see this:

# Eliminating .Net Message



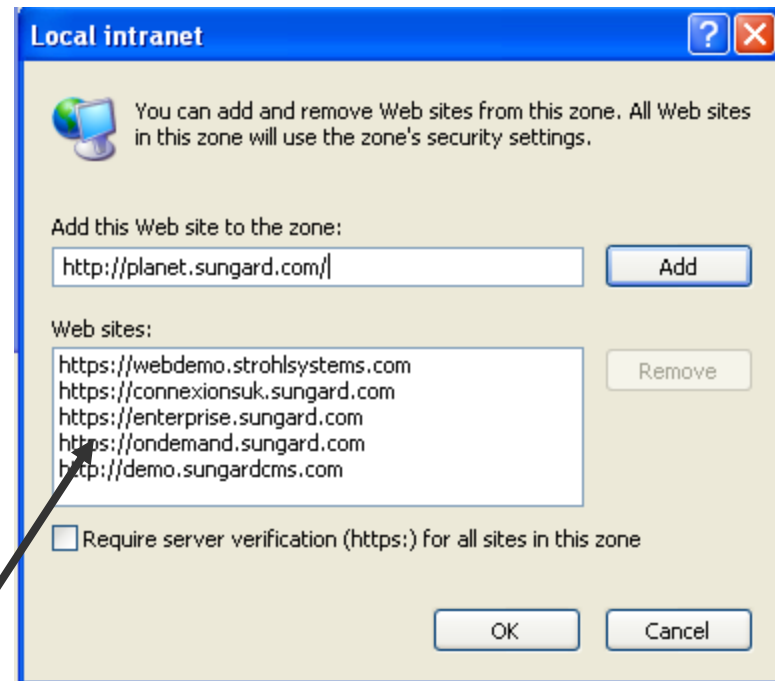
Now click on the Local Intranet option and you will now have the option to click on "sites".

# Eliminating .Net Message



Click on the Advanced button.

# Eliminating .Net Message



Start typing in planet.sungard.com and it will auto-populate. Then click Add and OK. That takes care of it!



# Questions and Answers

**What questions do you have?**