BIA Data Clean-up Checklist
Spring 2019

As you know, your initial data has been uploaded to Shadow-Planner from the BIA spreadsheet you submitted. Now it should be regularly updated and augmented on an ongoing basis by entering information directly into the system.

For existing BIA Local Process listed for your organization, please check to make sure the following items are completed correctly.

1. ***Process Type*** for Cloud applications:
   - For any IT systems that are Cloud applications (I.e., they are licensed from or maintained by a third-party vendor), please ensure that each item is listed as two separate Local Processes, once with the Process Type of Technology (e.g., with the name "Penn0365") and once with the Process Type of Third-party Vendor (e.g., with the name "Microsoft").

2. Under the ***General Information*** tab:
   - ***Process owner***:
     - This is the person in your organization who is most responsible for making this process, system or function work.
     - It needs to be the name of a specific person.
     - Use Search and Browse to find that person's name, and then drag and drop it into the field
   - ***Date last tested***:
     - Enter the date of your most recent tabletop exercise.
   - ***Business peaks:***
     - This is a free-text field.
     - Enter specific information about any times when this process is busier (for example, at Commencement, during Add-Drop, on Mondays of every week, etc.).
     - If business is pretty steady throughout the year, enter None.
   - ***Life dependencies:***
     - These are any person, specimens, animals or plants that are affected by this process, system or function.
     - Select one or more items from the checkboxes.
   - Update other items under General Information as necessary.

3. Enter ***RTOs and RPOs***:
   - See How-to document for step-by-step instructions for entering Recovery Time Objectives (RTOs) and Recovery Point Objectives (RPOs).
   - ***Remember***:

- The purpose of RTOs is to compare them to Achievable Recovery Times (ARTs), to see if there is a gap in expectations of when a system can be recovered.
- For Technology items, RTOs are entered using the same steps as RPOs. For items in the other 4 Process Types (Buildings, Equipment, Human Resources, 3rd-party vendors), the steps for entering RTOs are different. See How-to document for step-by-step instructions.
- For Cloud-based items, if available, check the contract to determine how quickly the application will be restored.
- RPOs are entered **ONLY** for Technology items.

2. Create ***dependencies***:
   - In Shadow-Planner, you can indicate something a Local Process relies upon in order to function properly: a building, an IT system or a 3rd-party vendor.
   - This allows you to see what needs to happen to make sure your critical processes and functions can move forward in the event of an outage or disruption.
   - See How-to document for step-by-step instructions for entering a dependency.

3. Has your ***leadership signed off***?
   - Make sure priorities, as well as RTOs and RPOs, are approved by School or Center leadership.

Once you've updated existing Local Processes, you can determine if you need to add new ones or delete any existing Processes.

1. Create a new Local Process: See Creating a Local Process document for step-by-step instructions.
2. Delete a Local Process:
   - Go to list of Local Processes on the BIA tab.
   - Under the Actions column, click on the double down arrow for this Process.
   - Select Delete.
   - When pop-up appears, click Yes.