



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

*Contingency Planning & Outsourcing, Inc.*

# Overview

## CPOtracker™

A “Preparedness Management Tool” for  
Disaster Recovery, Business Continuity,  
COOP and Emergency Management



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# *Contingency Planning & Outsourcing, Inc.*

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## A Few Facts to Answer Basic Questions.

### More Information Will be Provided in The Slides to Come

- **SECTORS** - CPOtracker is a very user-friendly and versatile planning software tool that can be used to build and maintain plans supporting any organization in the public and private sectors. A few examples are: Higher Education, Healthcare, Financial, Legal, Manufacturing, Information Technology, Energy, Entertainment, Services, Government at the Federal, State and Local level, and many more.
- **TYPE PLANS** - CPOtracker will assist you in developing and maintaining:
  - Disaster Recovery plans for Information Technology
  - Business Continuity plans supporting the business or administrative side of your organization
  - Continuity Of Operations Plans (COOP) as required for government organizations
  - Plans supporting Emergency Management.
- **LEVEL OF PLANNING** - Whether you are just beginning to address your planning needs or have plans at various levels of completion, CPOtracker will assist you through the process to where you can easily maintain them at a viable level going forward.
- **COMPLIANCE** – As a by-product of implementing and applying CPOtracker to address your planning needs, you will be able to demonstrate compliance with many government, regulatory and best-practice requirements.



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***Regardless of sector and whether you are addressing Disaster Recovery, Business Continuity, COOP or Emergency Management the following applies:***

## **Public & Private Sector Statistics**

The recovery planning industry has been in existence for 40+ years. Despite a multitude of vendors, consultants, their methodologies and software tools, less than 10% of all organizations have a viable DR, BC or COOP plan in place.

## **Reasons**

### **Maintenance**

*It is virtually impossible to maintain plans in today's world without a software tool. All too often the tools today are too complex, not user friendly, cost prohibitive and in some cases just don't perform as needed and expected.*

### **Accountability**

*Without accountability by the individuals responsible for critical information, resources and tasks, plans are seldom maintained at a current and viable level.*



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## **Welcome to an Overview of CPOtracker™**

- **Preparedness** - A software system designed for those who are responsible for preparing their organization and ensuring that at time of need it is ready to effectively respond to and recover from any emergency or disaster situation.
- **Maintenance & Accountability** - A system that simplifies the maintenance process and with accountability for every document, task and resource needed, better ensures compliance and support from those who are responsible.
- **A system that supports:**
  - **End-user** – user friendly, know what you own and its status, the system generates your plan
  - **Planner** – monitoring capability at the enterprise, location, team and end-user level as well as at the project, critical system, compliance and regulatory levels
  - **Management** – reports provide answers to their primary question “are we ready?”
- **At Activation and Incident Management Time** – ensures all the required information you will be relying upon is accessible, accurate and complete.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

**CPO Demo Company**

Home Page

[Logout](#) [Print Page](#) [Help](#)

Location:  4 Locations Coordinator: Jane Doe, CBCP >>

Team:  21 Teams Accountable for Team: Tony Ward

Click one of the links below or an item in the System Functions panel to navigate within the system [Readiness Legend](#)

<a href="#">Contacts</a>		327 Contacts Available; 7 Assigned To Teams; 2 should be verified soon
<a href="#">Team Members</a>		7 Team Members
<a href="#">Recovery Items</a>		11 Recovery Items; 1 Past Due
<a href="#">Recovery Issues</a>		0 Open Recovery Issues; 0 Past Due; 0 Closed
<a href="#">External Resources</a>		13 External Resources; 1 Need Verification
<a href="#">Call Tree Structures</a>		1 Call Tree Structures; 5 Total Calls; 1 should be verified soon
<a href="#">Recovery Locations</a>		20 Recovery Location Items; 1 Status 1; 5 Status 2; 14 Status 3
<a href="#">Recovery Plans</a>		1 Recovery Plan Structures

When you are finished, click the 'Logout' link to terminate your session.

Current User: carolanderson@cpodemo.com

**System Functions**

- Home**
- Contacts
  - Dashboard
  - Team Members
  - Recovery Items
  - Recovery Issues
  - External Resources
  - Call Tree Structures
  - Recovery Locations
  - Recovery Plans
  - Reports Menu
- Administrator**
  - Integrity Audit
  - System Utilities
- Information**
  - Recent Changes
  - About CPOtracker

**Main Menu:** Simple and intuitive interface.

**Real-Time Statistics:** Via color codes and statistical information displayed on the home page, you have a quick snapshot of the status of each key area of the system for any team at any number of locations supporting the enterprise.

**System Integrity Audit:** Scans the database for system setup problems and questionable data to ensure system integrity. It help the planner keep the system viable.

**On-line Help:** Access to the CPOtracker user guide is available from anywhere within the system by clicking on the [Help](#) link in the upper right section of the page; over 200 pages of on-line documentation.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

- **Contacts** - Any person that will need to be notified in the event of an emergency (may be imported from outside data sources)
- **Team Members** - Designated groups of Contacts with a specific mission supporting the overall response and recovery objective
- **Recovery Items** – Plan documents, tasks, and off-site storage “items” owned by a specific team and assigned to a specific individual is managed by this functional areas
- **Recovery Issues** – Problems and conditions that can adversely impact response and recovery are assigned to a specific team and individual for resolution
- **External Resources** – Companies or individuals critical to the response and recovery process that are outside the organization
- **Call Tree Structures** – Create and manage Call Trees
- **Recover Locations** – Manage recovery locations and the assets required to effectively utilize them: Incident Command Centers, Hot-site, Co-locations, Business Recovery locations, quarantine areas, emergency shelters, etc.
- **Recovery Plans** – Define the contents of Plans, at the Team level. The system with automatically generates Plans from data and documents under its control.

The screenshot displays the CPOtracker system interface. At the top, there are dropdown menus for 'Location' (set to Atlanta) and 'Team' (set to Crisis Management Team). To the right, it shows '4 Locations', '21 Teams', 'Coordinator Jane Doe, CBCP', and 'Accountable for Team: Tony Ward'. Below this is a navigation bar with a link to 'Readiness Legend'. The main content area lists several system components with their respective counts and status:

System Function	Status/Count
<a href="#">Contacts</a>	327 Contacts Available; 7 Assigned To Teams; 2 should be verified soon
<a href="#">Team Members</a>	7 Team Members
<a href="#">Recovery Items</a>	11 Recovery Items; 1 Past Due
<a href="#">Recovery Issues</a>	0 Open Recovery Issues; 0 Past Due; 0 Closed
<a href="#">External Resources</a>	13 External Resources; 1 Need Verification
<a href="#">Call Tree Structures</a>	1 Call Tree Structures; 5 Total Calls; 1 should be verified soon
<a href="#">Recovery Locations</a>	20 Recovery Location Items; 1 Status 1; 5 Status 2; 14 Status 3
<a href="#">Recovery Plans</a>	1 Recovery Plan Structures

(Cropped insert from Main Menu)

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

The screenshot displays the 'Contact Detail' screen in the CPOtracker application. The interface includes a top navigation bar with 'Print Page' and 'Help' links, and a menu bar with options like 'Edit', 'Close', 'Add', 'Delete', 'Member Detail', and 'Security Settings'. A search bar at the top allows filtering by contact name (A-Z). The main form is divided into several sections: 'Contact' (Name, ID, Type, Email, Mail Code, Security PIN, Status), 'Address Section' (Street, City, State, Zip, Country), 'Phone Numbers' (Work, Home, Cell, Pager, Other Phone 1, Other Phone 2), 'Emergency Contacts' (Name, Relationship, Primary, Secondary), and 'Additional Information' (Language Skills, Travel Status, Travel Notice, 4x4 Vehicle, Work From Home, Emergency Train, Satellite Phone, and a Comment field).

Contact Detail			
Print Page Help			
Edit Close Add Delete Member Detail Security Settings			
<input type="checkbox"/> Contacts on Teams Only			
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z			
Contact: Anderson, Carol			
Name (First/Middle/Last): Carol Anderson		Date Verified: 5/1/2011	
Contact ID: 5076		<input checked="" type="checkbox"/> Confidential <input type="checkbox"/> Private <input checked="" type="checkbox"/> Crisis Contact	
Type Contact: Employee		Job Title:	
Email Addresses: CarolAnderson@cpodemo.com			
Mail Code: 2ND FLOOR		Security PIN: 6000578	
Status: Active			
Address Section			
Street: 456 Hwy 69			
City: Jenkinsville		State: SC	Zip: 29065-1122
Country:			
Phone Numbers			
Work: (803) 358-8124	Home: (803) 908-6689	Cell: (803) 383-9044	Pager:
Other Phone 1: (803) 696-2789 Mothers house		Other Phone 2: (803) 569-5560 Neighbors House	
Emergency Contacts			
Name: Mattie Anderson	Relationship: Aunt/Uncle	Primary: (803) 450-7867	Secondary: (803) 652-6805
Additional Information			
Language Skills: French		Travel Status: Yes	
Travel Notice: < 24 hrs			
<input checked="" type="checkbox"/> 4x4 Vehicle <input checked="" type="checkbox"/> Work From Home <input checked="" type="checkbox"/> Emergency Train <input checked="" type="checkbox"/> Satellite Phone			
Comment:			

## Contact Detail Screen

Detail contact information is maintained on each individual associated with a team, whether they are an employee, vendor, contractor, or external resource. Contact information may be shared between locations. Updating contact information in one place applies to all references to that individual. User-defined fields provide for client customization.

**Import Contact Information** - With the option to import contact information from a file from your HR or other system, you can quickly establish your critical contact information. If performed on a regular basis, maintenance is reduced and accuracy is better ensured. The System can be scheduled to automatically perform a contact import on any desired frequency: weekly, by-weekly, monthly, quarterly, etc.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

The screenshot displays the 'Team Member Detail' interface. At the top, a navigation bar includes 'Print Page' and 'Help'. Below this is a toolbar with buttons: 'Edit', 'Close', 'Add', 'Delete', 'Move', 'Contact Detail', 'Item Detail', 'Call Tree', 'Plan Structure', and 'Gen Plan'. The main form area contains several dropdown menus: 'Location' set to 'Atlanta', 'Team' set to 'Crisis Management Team', 'Contact' set to 'Anderson, Carol (Alternate 1)', and 'Assignment' set to 'Alternate 1'. A 'Type Contact: Employee' label is present. A yellow 'Add to Another Team' button is located next to the Contact dropdown. Below these is a 'DR & BCP Plan: Emergency & Team Plan' label and a checkbox for 'Make this person 'Accountable for Team' (change from Tony Ward)'. A 'Comment' text area is at the bottom of the form. Below the form, there are three expandable sections: 'Plans Issued', 'Offsite Storage Authorizations', and 'Team Mission and Responsibilities'. At the bottom, there is a 'Show Legend' checkbox and an 'Advanced Team Member Management' checkbox. The 'Show Legend' section displays a tree structure showing Carol Anderson's assignments across three locations: Atlanta, Data Center - Tampa, and Corporate Crisis Management. Each location lists specific teams and roles, such as 'Crisis Management Team (Alternate 1)', 'LAN & PC Support (Resource)', 'Human Resources (Resource)', 'Finance (Alternate 1)', and 'Pandemic Preparedness & Response (Resource)'.

Team Member Detail

Print Page Help

Edit Close Add Delete Move Contact Detail Item Detail Call Tree Plan Structure Gen Plan

Location Atlanta Team Crisis Management Team

Contact Anderson, Carol (Alternate 1) Add to Another Team

Type Contact: Employee

Assignment Alternate 1 DR & BCP Plan: Emergency & Team Plan

☐ Make this person 'Accountable for Team' (change from Tony Ward)

Comment

+ Plans Issued

+ Offsite Storage Authorizations

+ Team Mission and Responsibilities

+ Show Legend ☐ Advanced Team Member Management

Carol Anderson is on a total of 6 Teams

- Atlanta
  - Crisis Management Team (Alternate 1)
  - LAN & PC Support (Resource)
  - Human Resources (Resource)
  - Finance (Alternate 1)
- Data Center - Tampa
  - Crisis Management Team (Alternate 1)
- Corporate Crisis Management
  - Pandemic Preparedness & Response (Resource)

## Team Detail Screen

This screen allows you to manage the individual as to what team or teams they are on and what position or “assignment” they have. Team Assignments can easily be changed and members can easily be added, transferred or deleted. Maintaining a current Team Organizational Structure in a dynamic and changing organization can, in itself, become a maintenance nightmare. CPOtracker simplifies adjusting the system to support personnel and organizational changes. The organizational structure at the bottom of the screen shows all the teams this person is on at all locations.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

Recovery Item Detail											
<a href="#">Print Page</a> <a href="#">Help</a>											
Edit	Close	Add	Copy	Delete	Move	Member Detail	Plan Structure	Generate Plan			
Location		Atlanta		Team		Crisis Management Team					
Item		DRMT Team Instructions		ID=303		This Team has 11 Items on file					
Description		DRMT Team Instructions		Type		Document					
Priority		2 - Could Significantly Delay Recovery		Critical System		BIA					
Update Freq		6 Months		Last Update		4/21/2011		Next Update		10/25/2011	
Assigned To		Anderson, Carol									
<a href="#">+ Storage Section</a>											
<a href="#">- Associated Document Section</a> <a href="#">i</a>											
Document <a href="#">CPO - Template-Plan DRMT Instructions.doc</a>											
<a href="#">Upload Document</a> <a href="#">Select Document</a>											
Available for Plan <a href="#">All Teams and Locations</a> Last Modified: 1/13/2009											
There is 1 reference to this Item in the Recovery Plan section for the following Location/Team: Atlanta/Crisis Management Team											
This document contains the instructions the DRMT Team Manager and Alternates will use in responding to and coordinating the recovery effort. This Plan is specifically designed to support the DRMT and should not be used for other teams.											
Detail Description											
Comment											

## Item Detail Screen

This screen provides for the management of all documents, tasks and storage “items” assigned to teams. Each Item is assigned to a Team and a specific individual who is responsible or “accountable”. CPOtracker can be scheduled to automatically send an email to the person “accountable” reminding them of Items coming due or are currently past-due. The Documents are maintained outside the CPOtracker system, but controlled via insertion of the document’s location. Documents may be in Word, Excel, Visio, PowerPoint, and PDF, etc., and can be made available to any one or all teams in any or all locations for inclusion in plans. CPOtracker interfaces with most document management systems, such as SharePoint.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

Recovery Issue Detail									
<a href="#">Print Page</a> <a href="#">Help</a>									
Edit	Close	Add	Delete	Move	Member Detail	Plan Structure	Generate Plan		
Location		Atlanta		Team		LAN & PC Support			
Issue		LAN Backups		ID=29		This Team has 2 Issues on file			
Description		LAN Backups							
Priority		1 - Could Prevent Recovery		Critical System		IT Recovery			
Initiated By		Bannie Smithwell							
Assigned To		Anderson, Carol							
Date Opened		4/22/2011		Target Resolution Date		6/22/2011		Date Closed	
Detail Description		Due to the growth of the LAN, support personnel are not able to back up all servers on some nights due to a lack of time. Newer and faster back up equipment is needed.							
Status		4/22/2011: At a meeting, CIO stated PO was signed, awaiting RFP information from Procurement							

## Issue Detail Screen

Issues are any problem that can cause an adverse impact on the organization's ability to effectively respond to and/or recover from any emergency or disaster situation. This screen provides for the identification of Issues where they are defined, prioritized, assigned to a Team and specific individual to address. A running status can be maintained. Issues can be optionally included in management and readiness reports. Issues may be associated with any critical system, compliance or regulatory requirement. Issues can be associated with a specific test or exercise to help manage the post test phase.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

External Resource Detail										
<a href="#">Print Page</a> <a href="#">Help</a>										
<div>Edit Close Add Delete</div>										
Resource <span>CPO, Inc.</span>	Location <span>(all)</span>									
Name/Desc <span>CPO, Inc.</span>	Assigned To <span>Ward, Tony</span>									
Type <span>Recovery Services</span>	Date Verified <span>4/18/2011</span>									
Critical System <span></span>	<input type="checkbox"/> Crisis Resource									
<b>Resource Details</b>										
Primary Contact Name <span>Tim Lord</span>	Phone <span>(803) 712-6105</span>									
Street <span>4530 Jackson Creek Road</span>										
City <span>Winnsboro</span> State <span>SC</span>	Zip <span>29180</span> Country <span></span>									
Web Site <span><a href="http://www.cpotracker.com">http://www.cpotracker.com</a></span>										
Comment <span>CPO is our provider of BCP planning tools and services. In the event of a disaster, thier BCP knowledge and experience could be very helpful. They want to be informed and will make a best effort to support the response and recovery effort.</span>										
<input type="checkbox"/> This is a Recovery Location Site Display Sequence <span>0</span> Status <span>Active</span>										
<table><thead><tr><th>Contact Name</th><th>Work Phone</th><th>Email</th></tr></thead><tbody><tr><td><a href="#">Rick Fosnacht</a></td><td></td><td><a href="mailto:Rick.Fosnacht@CPOtracker.com">Rick.Fosnacht@CPOtracker.com</a></td></tr><tr><td><a href="#">Tim Lord</a></td><td>(803) 712-6105</td><td><a href="mailto:Tim.Lord@CPOtracker.com">Tim.Lord@CPOtracker.com</a></td></tr></tbody></table>		Contact Name	Work Phone	Email	<a href="#">Rick Fosnacht</a>		<a href="mailto:Rick.Fosnacht@CPOtracker.com">Rick.Fosnacht@CPOtracker.com</a>	<a href="#">Tim Lord</a>	(803) 712-6105	<a href="mailto:Tim.Lord@CPOtracker.com">Tim.Lord@CPOtracker.com</a>
Contact Name	Work Phone	Email								
<a href="#">Rick Fosnacht</a>		<a href="mailto:Rick.Fosnacht@CPOtracker.com">Rick.Fosnacht@CPOtracker.com</a>								
<a href="#">Tim Lord</a>	(803) 712-6105	<a href="mailto:Tim.Lord@CPOtracker.com">Tim.Lord@CPOtracker.com</a>								

## External Resource Detail Screen

External Resources are individuals or organizations outside your organization who will be relied upon in some way to provide products, services or support. This screen provides for detail information regarding the External Resource and contact information. External Resource information can optionally be restricted to one Location or shared by all Locations. The person in the “Assigned To” field is responsible for maintaining this information and the system can be scheduled to automatically send an email reminder. Reports providing External Resource information may be included in plans.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

Call Tree Structures

[Print Page](#) [Help](#)

Edit

Close

Member Detail

Call Tree Reports

Plan Structure

Generate Plan

Location

Atlanta

Team

Crisis Management Team \*\*

Delete Structure

☐ Include Sub-Teams in the Deletion

Call Tree Structure for current Team

Team Members not in the Call Tree Structure

Anderson, Carol (Alternate 1)

Add to Structure >>

Contacts Assigned to the current Team

Other Contacts Available to be called

Add to Structure >>

Ward, Tony (Manager)

Tomlin, Micky (Alternate 1)

Kide, Stan (Alternate 2)


Mower, John (Resource)

Fosnacht, Rick (Deputy)

Walters, Boyd (Resource)

Move to Top

Remove

 [Compose Email](#)

☐ Transfer to the Contact Detail Page when an entry is clicked in the above Structure

## Call Tree Structure Screen

CPOtracker will automatically generate a Call Tree Structure for any one or all Teams, which then becomes the basis for several reports that can be included in plans: Name Order, Team Order. An individual's Call Tree can be printed in card form, which he/she can then cut along the dotted lines to carry in their wallet or pocketbook. From this screen, emails can be sent to those listed in the Call Tree. Note: Not shown in this PowerPoint, but emails can also be sent to all Team Members for any one or all teams. This email capability is a good communications aid during incident management.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

Recovery Location List

Print Page

Help

LocationAtlanta

New Rec Loc Item

Team(all)

Recovery Location SiteMarriott - Incident Command Center

Incident Command Center

☒ Status Code

☒ Assigned-To

33 Rec Locs Items in the List

Number of Rec Locs Items to display on one page14

Team	Rec Loc Item Desc	Status	Assigned To	Verified Date
Crisis Management Team	<a href="#">Conference Room For 10</a>	3	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Conference Room For 75</a>	3	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Copier</a>	3	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Desktop Computer</a>	3	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Employee Work Space</a>	3	<a href="#">Ward, Tony</a>	12/1/2010
Crisis Management Team	<a href="#">Fax Machine</a>	3	<a href="#">Dallas, Bruno</a>	1/2/2011
Crisis Management Team	<a href="#">Laptop Computer</a>	3	<a href="#">Ward, Tony</a>	12/5/2010
Crisis Management Team	<a href="#">Manager Work Space</a>	3	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Printer</a>	2	<a href="#">Ward, Tony</a>	12/9/2010
Crisis Management Team	<a href="#">Supervisor Work Space</a>	3	<a href="#">Curtain, Jane</a>	12/9/2010
Crisis Management Team	<a href="#">Telephone</a>	2	<a href="#">Ward, Tony</a>	1/2/2011
Information Technology	<a href="#">Copier</a>	1	<a href="#">Albertson, Cindy</a>	1/15/2011
Human Resources	<a href="#">Employee Work Space</a>	3	<a href="#">Whittinghill, Brad</a>	12/9/2010
Human Resources	<a href="#">Laptop Computer</a>	3	<a href="#">Whittinghill, Brad</a>	1/2/2011

1

2

3

## Recovery Location – Detail Screen

CPOtracker allows you to define the places you plan to establish or relocate to as well as define all the assets and resources needed by each team in order to effectively utilize the “Recovery Location”. A person is assigned to ensure each Item will be available at time of need and the “Status” indicates its degree of readiness: 1 = “not addressed”, 2= “partially addressed but not ready yet”, 3 = “Ready and will be available”. Recovery time intervals are user-defined and each item is assigned to a time “interval”. There are several reports showing what Items will be needed at what time interval at what Recovery Location. An overall “readiness” report shows how ready you are to utilize the various Recovery Locations.

# Develop and Manage Your DR, BC and COOP Program with CPOtracker

## Defining the Plan Structure

The Plan Structure page is used to custom design a Plan for each team.

With all plan supporting information being either in the CPOtracker database or in documents defined as Items, which are under the control of the system, you simply select the reports and documents you want from the list available, arrange and group them how you want them to appear in the plan. This becomes your Plan Structure

Once the Plan Structure is defined, the Plan can be generated from the Reports menu. An updated Plan can be regenerated quickly and easily anytime the supporting information changes. A Plan Structure can easily be modified whenever new documents and/or reports are required.

Recovery Plan Structure

[Print Page](#) [Help](#)

EditPlan ListCopy StructureDelete StructureMember DetailGenerate Plan

LocationAtlantaTeamPayroll \*\*

[+ Generation Parameters and Summary Fields](#)Structure last update: 4/30/2011Plan last generated: 5/1/2011

There are 9 items in this Recovery Plan

☐ Email All Members

Item	Type	Description	Detail Description	TOC Indent
1	Rpt	Front Cover and Table of Contents	Front Cover for the Recovery Plan and Table of Contents	
2	TOC	Mission Statements		
3	Rpt	Corporate Office Mission Statement	Location Mission and Assumption Statements	1
4	Rpt	Payroll Mission Statements	Team Mission Statements and Responsibilities	1
5	TOC	Emergency Contact Information		
6	Rpt	Contact Detail, by Team	Detail report of Contact information, sorted and grouped by Team Assigned	1
7	Rpt	Call Tree, by Name	Team Call Tree Report, by Caller Name	1
8	Doc	Accident & Injury Procedures	<a href="#">c:\cpodocs\cposampleddocuments\CPO - Template-Accident Reporting.doc</a>	1
9	Doc	Emergency Fire Procedures	<a href="#">c:\cpodocs\cposampleddocuments\CPO - Template-Fire Evacuation Plan.doc</a>	1

Items to be displayed:

☐ None☒ Team Related Documents☐ All Documents☐ All Reports

There are no available items matching the specified type

When a Plan is generated, CPOtracker opens the application for each document defined in the Plan Structure and moves a copy into the Plan. It also automatically runs each report specified in the Plan Structure to ensure the most recent information in the system is included in the Plan. It will then assemble the reports and documents in the specified order, renumber all the pages, insert the proper page number in the table of contents, insert a cover page and then merge the documents and reports into one PDF. The Plan can be emailed, printed and distributed or loaded to a secure area on your intranet or internet site to be available when needed. If emailed from within CPOtracker, the Plan can optionally be encrypted and password protected.

# CPOtracker Generates Plans

**CPO Demo Company**

**Atlanta**

**Crisis Management Team**

## **Emergency Response and Recovery Plan**

This document contains the responsibilities and instructions pertaining to the Teams comprising the CPO Demo Company Atlanta Disaster Recovery and Business Continuity Program in their effort to protect the organization from physical or other contingencies threatening the employees, assets, good-will and continued high level of service to customers and users.

Due to the sensitive nature of this information, the distribution of this document is strictly controlled and limited.

Copying, loaning and allowing individuals outside the designated distribution to view this document without consent from CPO Demo Company is not allowed.

**Effective date: Sunday, May 1, 2011**

Questions related to this document should be directed to:

**Tony Ward**

Work: (803) 433-6536

Cell: (803) 608-3277

TimWard@cpodemo.com

CPO Demo Company Inc. - Confidential and Proprietary Information

This is an example of the front cover of the CPOtracker generated plan.

The user has the option to modify the text on the cover page or insert their own cover to replace the system generated one.

Some Important Plan Related Features:

- The system can be scheduled to automatically regenerate any one or all Plans at whatever frequency desired.
- Whenever any document within a Plan is modified by the person accountable, an email will be sent to all Team Managers having a Plan containing that document reminding them to regenerate their Plan to incorporate the changed document.

# CPOtracker Generates Plans

## CPO Demo Company

### Atlanta

#### Crisis Management Team

#### Emergency Response and Recovery Plan

##### Table of Contents

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This is an example of the CPOtracker generated table of contents for the Plan.

Each entry in the table of contents corresponds to a specific report or document that was defined in the Plan Structure.

Plan Structures can easily and quickly be adjusted as new documents and/or reports are needed within the plan.

# Reports Menu

The screenshot displays the 'Reports Menu' interface. At the top, there's a title bar 'Reports Menu' with 'Print Page' and 'Help' links. Below is a 'Close' button. The main area is divided into sections: 'Select Report Category' with a dropdown set to 'Contacts'; 'Location' and 'Team' dropdowns set to 'Atlanta' and 'Crisis Management Team' respectively; 'Select Report' with a list of report options where 'Contact Detail, by Name' is selected; 'Report Parameters' with checkboxes for 'Print Confidential Info' (checked), 'Include Sub-Teams', and 'Include Contacts Not On Teams'; and a dropdown to 'Specify the Type of Contacts to be included in the report' set to '(all)'. At the bottom, there's a 'Report Destination' section with radio buttons for 'Display to Screen' (selected) and 'Export to File', and a 'Generate Report' button.

Reports Menu

Print Page Help

Close

Select Report Category

Contacts

Select Report

- Contact Detail, by Name
- Contact Detail, by Team
- Contact Detail for Selected State/City
- Contact Summary, by Name
- Crisis Contact Detail List
- Crisis Contact Summary List
- Contacts Not On Teams
- Contact "Assigned To" List
- Contact "Assigned To" Summary Count
- Contact "Assigned To" List, By Team
- Contact Update Letters
- Contact Offsite Storage Authorizations

Location Atlanta

Team Crisis Management Team

Report Parameters

☒ Print Confidential Info ☐ Include Sub-Teams

☐ Include Contacts Not On Teams

Specify the Type of Contacts to be included in the report

(all)

Detail report of Contact information and their Team Assignments, sorted by Name

Report Destination

☒ Display to Screen

☐ Export to File

Generate Report

The Reports Menu provides for quick and easy selection from 10 different categories of over 60 reports.

Reports support the ability of the end user, the Planner and/or Management to print, email and export to a pdf a variety of information and statuses; all aimed at providing the ability to know and manage the degree of readiness at the team, location or Critical System level.

**Maintenance Reports:** Teams can use various reports to manage their specific responsibilities. The Planner can use reports to manage the overall DR, BC and COOP program as well as produce status and readiness reports for management.

**Pro-active Reporting:** Many reports can be run with an effective date in the future to provide team managers with a status as of a future date. This allows the person responsible to address specific Items, Issues, etc. in advance of them being "past-due".

**Management Reports:** There is a specific group of reports that provide graphs and supporting detail information geared to briefing management on the "Degree of Readiness" to respond and coordinate recovery at the team, location and enterprise level.

**Plan Generation:** Plans may be produced for individual teams as well as the entire Location/Campus. This complex and comprehensive Plan document can quickly and easily be produced in PDF format.

**Viewing and Exporting Reports:** Most all reports can be viewed on-line before being printed, exported or e-mailed.

# Management Reports

The screenshot shows a web application interface for generating reports. At the top, there's a 'Reports Menu' header with 'Print Page' and 'Help' links. Below this is a 'Close' button. The main area is divided into several sections:

- Select Report Category:** A dropdown menu with 'Management' selected.
- Select Report:** A list of report types, with 'Consolidated Readiness Reports' highlighted.
- Location:** A dropdown menu with 'Atlanta' selected.
- Team:** A dropdown menu with '(all)' selected.
- Report Parameters:** A section with checkboxes for 'Suppress Contact/Resource List' (checked), 'Include Sub-Teams' (unchecked), and 'Suppress Page Numbers' (unchecked). It also includes an 'Effective Date' field set to '5/1/2011' and a text box explaining that records can be restricted by Critical System area. Below this is a dropdown menu with '(all)' selected.
- Include the following in the Consolidated Report:** A section with checkboxes for 'Recovery Plans' (checked), 'Recovery Issues' (checked), 'External Resources' (checked), and 'Recovery Locations' (checked).
- Report Destination:** Radio buttons for 'Display to Screen' (selected) and 'Export to File'.
- Generate Report:** A button to initiate the report generation.

At the bottom, there's a link: 'Contacts, Recovery Items, Outstanding Issues and External Resources Readiness Reports'.

One of the 10 categories of reports focuses on briefing Management on the organization's "degree of readiness" and answers Management's primary question, "are we ready?"

Readiness Reports can be run individually for specific Functional areas of preparedness or consolidated into a full report on any one or all Locations.

Readiness Reports allow the Planner to know and report on the degree of readiness of any Location/Campus to meet an anticipated or pending threat.

Readiness reports, as with all reports, can be printed, emailed or exported to a pdf.

You can include or exclude various components such as Recovery Issues and Recovery Locations depending upon their need or relevance. You can also include or exclude detail information depending on the level desired.

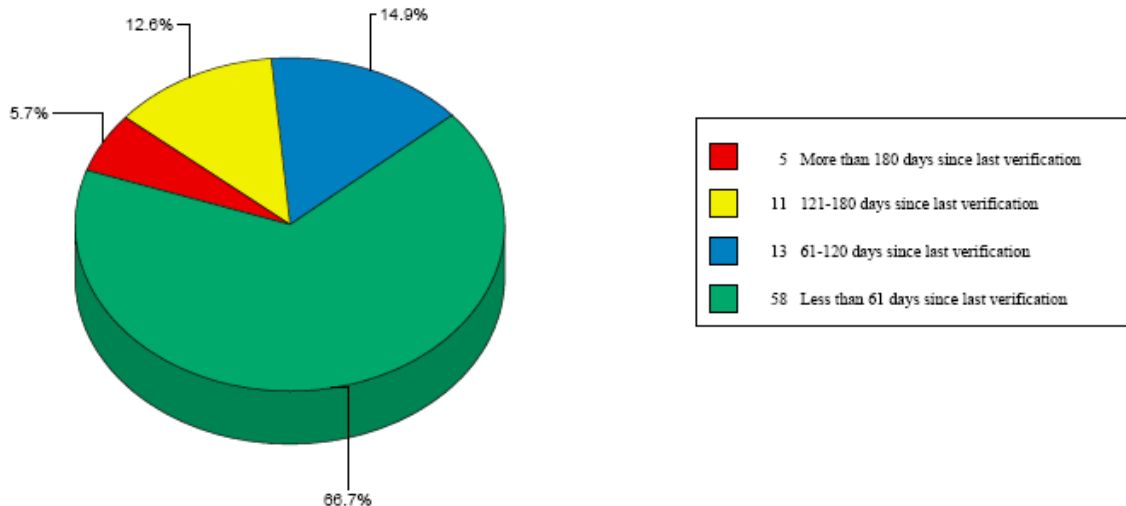
A very useful feature of the Readiness Reports is that they can be run for a specific "Critical System" or "Compliance" requirement such as Sarbanes-Oxley, HIPAA, NFPA 1600, Title IX, Pandemic, etc.

Various sections of a sample Consolidated Readiness Report are provided on the next few slides.

# Management Report – Contact “Readiness”

CPO Demo Company - Atlanta  
Contact Readiness - Effective 5/1/2011

## Contact Data Verification Status



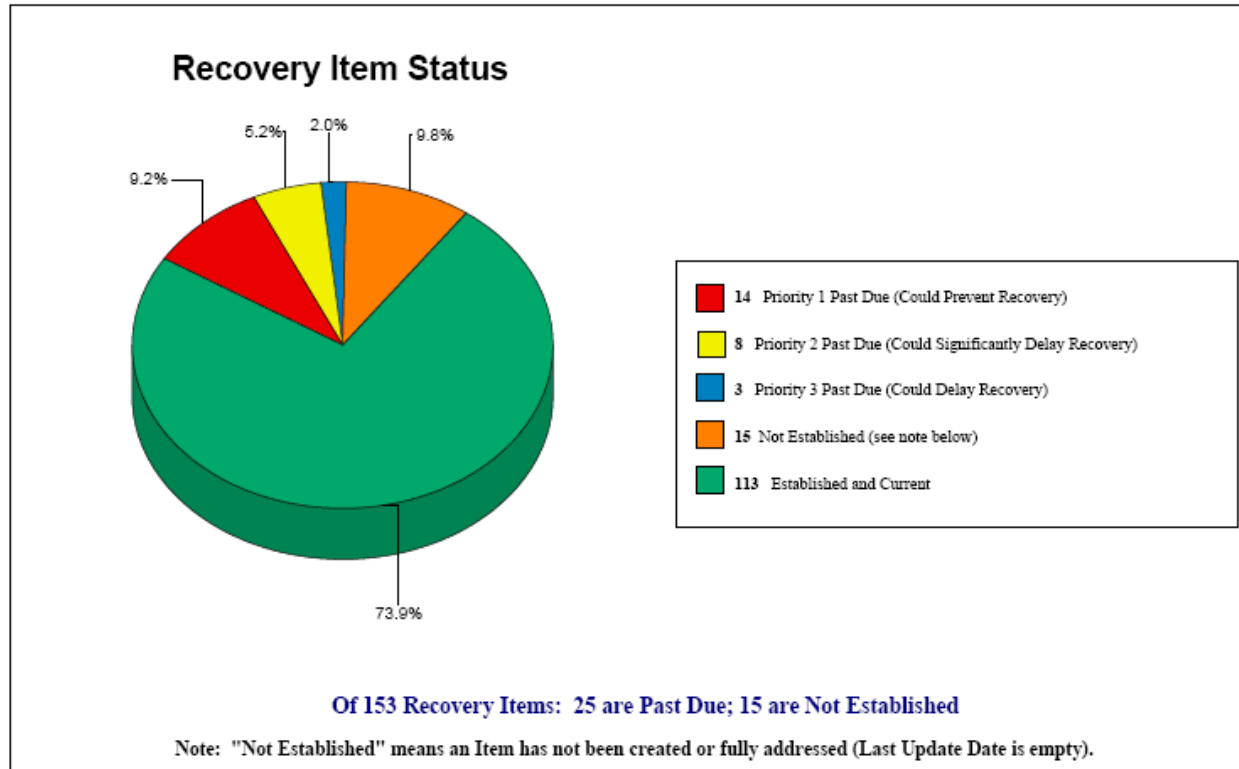
**Information is Current for 71 of 87 Team Members**

Note: The totals on this page represent "Team Members".  
If an individual Contact is assigned to multiple teams, they are included in these totals once for each team to which they are assigned.

This sample Contact Summary report indicates that if you experienced an emergency under the “current” conditions, you very well may not be able to contact those involved in response and recovery. The person running the report has the option to list the names, team assignments along with the date their contact information was last verified for those delinquent in maintaining their Contact information, which is presented separately on the next page within the report, however not included here.

# Management Report – Recovery Item “Readiness”

CPO Demo Company - Atlanta  
Recovery Item Readiness - Past Due as of 5/1/2011



The first page of this sample Recovery Item Summary report indicates that 25 documents, storage items and tasks supporting response and recovery have not been updated as required and 14 of those 25 are mission critical (priority 1) items. Eight items are priority 2 and could “significantly delay recovery”. Another Fifteen items are “Not Established” or completed. If you had a disaster today under this level of readiness, your timeframe and level of recovery may not be acceptable or even possible!

# Management Report – Recovery Item “Readiness”

CPO Demo Company - Atlanta								
Recovery Item Readiness - Past Due as of 5/1/2011								
Team Name / Accountable for Team	Total Items	Not Established	Established Total	Past Due	Past Due by Item Priority			Highest Number of Days Past Due
					Pri 1	Pri 2	Pri 3	
Crisis Management Team Tony Ward	11	3	8	1	0	1	0	40
DR/BC Test Team Joy Dumbhill	5	0	5	0	0	0	0	0
Information Technology Ellen Beasley	1	0	1	1	1	0	0	12
LAN & PC Support Bruce Smithwell	18	1	17	4	3	1	0	12
Systems Ben Stoneware	9	0	9	2	0	1	1	27
Human Resources Carol Anderson	30	4	26	6	4	0	2	176
Payroll Sherry Walden	6	0	6	2	1	1	0	23
Finance Carol Anderson	14	4	10	4	0	4	0	85
Accounts Payable Michael Lanan	10	1	9	1	1	0	0	18
Accounts Receivable David Charles	6	0	6	2	2	0	0	10
Risk Management Marshall Ellis	21	0	21	2	2	0	0	23
BCP/DR Support Micky Tomlin	4	2	2	0	0	0	0	0
BIA Team Roberta Strange	13	0	13	0	0	0	0	0
Mitigation Patty Benson	5	0	5	0	0	0	0	0
<b>Total Items</b>	<b>153</b>	<b>15</b>	<b>138</b>	<b>25</b>	<b>14</b>	<b>8</b>	<b>3</b>	<b>176</b>

ItemReadiness

Page 2 of 2

Sunday, May 01, 2011

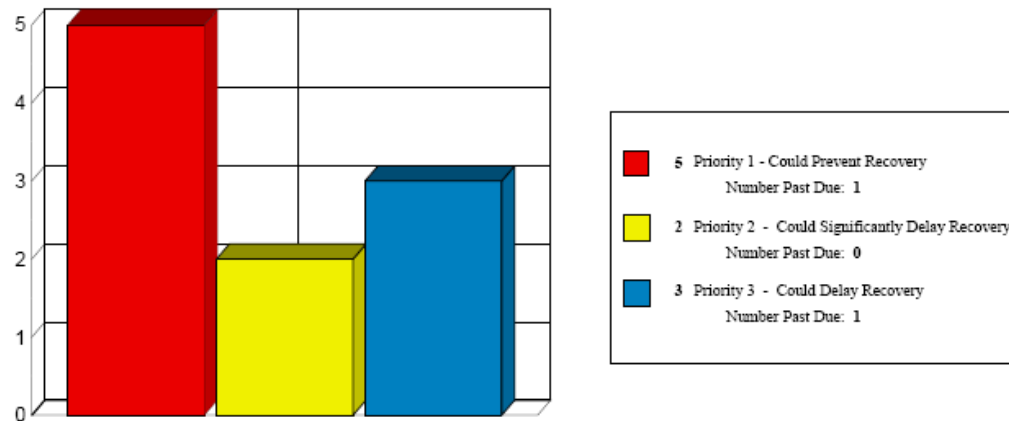
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The second page of the Recovery Item Readiness report shows a status of each team's maintenance effort on their assigned documents, tasks and storage items. You can see exactly which teams need attention in their effort to be prepared. In addition, when people who are responsible for being prepared know this type of reporting is going to management, they will be more vigilant towards maintaining their assigned items.

# Management Report – Recovery Issues “Readiness”

CPO Demo Company - Atlanta  
Open Recovery Issues as of 5/1/2011

## Open Issues Summary



**There are a Total of 10 Open Recovery Issues on File - 2 are Past Due**

The Recovery Issues “Readiness” report shows how many Issues or problems exist and their anticipated level of impact on your response and recovery effort. If you were to experience a disaster under these conditions, there are 5 Issues that may prevent recovery and 2 that could significantly delay recovery. A detailed list of all Issues is optional and would follow.

# System Utilities Menu



This area of the System allows the user to customize the CPOtracker system to meet the organization's specific planning needs.

Many of the parameters are supplied with anticipated values. Therefore, the time and effort to alter the system is greatly reduced.

This area is addressed and accessed by the Planner and/or System Administrator. The end-user would not need to access this area and, therefore is restricted from it.

<b>Organization Setup:</b>	Specify Organization name and overall settings
<b>Location Setup:</b>	Specify Mission Statement and Assumptions
<b>Team Setup:</b>	Specify Team Structure, Mission Statements, Responsibilities, RTO and RPO
<b>Custom Terminology:</b>	*Specify custom terminology used throughout the application
<b>General System Codes:</b>	Customize a number of internal tables used throughout the system
<b>Import Utility:</b>	Provides the process to import Contact and Recovery Item information from an outside data source
<b>Export Utility:</b>	Provides the process to Export information to an outside source: automatic notification system, etc.
<b>Job Manager:</b>	Provides the capability to schedule jobs to be run automatically at a desired frequency: weekly, bi-weekly, monthly, quarterly, etc. Such jobs as: automatic import of contact information, automatic email reminders, automatic regeneration of plans, system integrity audits
<b>Backup Database:</b>	Request a backup of the CPOtracker database

\* Custom Terminology will allow "Organization" to be changed to "University" if you are an educational facility. It would allow "Location" to be changed to "Office Location" or "Campus". Most all terms seen on the Home Page are customizable to support your preference and would not only be changed on all screens throughout the system, but also all reports generated from the system.



# Benefits to You

- You will know, at any given time, **how ready** each Office Location, Campus, etc. is by:
  - Team
  - Team Member
  - Critical System
  - Building
  - Regulatory, Compliance and Special Project, etc.
- Uses **existing documents**: Word, Excel, Visio, PowerPoint, PDF, jpg, gif, etc.
- Provides capability to **demonstrate compliance** with most standard and regulatory requirements
- **Accountability** for all mission related plans and supporting information and tasks runs throughout the system
- System will automatically **send email reminders** to anyone owning: documents, tasks, storage items that are coming due or are past due.



# Benefits to You

- System provides for **scheduled automatic import** and update of **Contact Information**
- System will **automatically generate plans** from information in its database and documents under its control
- **Web-based** - CPO Hosted and Client Hosted systems available. Critical information and plans can be accessed via the Internet from anywhere in the world.
- Requires **less time** to implement, develop and keep plans current
- **Interfaces with** most third party **automatic notification** and **incident management** systems



# Benefits to You

**Other Uses for the CPOtracker System** - While CPOtracker is designed to develop, manage and maintain documents and information supporting emergency planning, it can also be used by many other areas of your organization, it's not just for emergency planning:

- **Documents and Information** – you can manage documents regarding standard operating procedures, policy statements, customer contracts, inventory lists, etc. and have the system automatically send email reminders to those responsible to maintain them.
- **Procedure Manuals** – with the system managing documents and forms as well as other information, you can easily pull any or all into one consolidated “manual”. You simply tell the system which you want and it will generate the manual for you to include a cover and table of contents
- **Tasks Management** – you can assign tasks to people and have the system automatically send an email reminder to them as the due date approaches. Managers can be informed as well. Reports on the status of all Tasks.
- **Forms** – you can manage forms as to where they are kept, how many are in inventory and who is responsible to maintain and update them as well as have the system automatically remind them via email when maintenance is due.
- **More Applications** – space doesn't allow for all the applications to be listed where CPOtracker could be applied to help your organization manage and stay on top of tasks, assets, projects, etc.



# Why You Should Choose CPO

- CPO is the exclusive owner of the CPOtracker system. CPO developed, maintains and supports the CPOtracker system.
- Product and Service Guarantee with every installation
- CPOtracker is offered at whatever level needed to support your planning schedule and budget
- No long-term contracts and no hidden fees
- The CPO Methodology and CPOtracker system has a proven track record of 20+ years
- Quick installation/access, training and implementation
- 24 hour technical support via email and/or phone
- Product Help Desk provided via email and/or phone



# Why You Should Choose CPO

- Almost 70% of our customers have come to us after previously choosing a tool that was too complex, support was poor or non-existent and ongoing costs were too high
- We have never had a customer discontinue use of the CPOtracker system due to poor performance or support



# CPOtracker Availability and Pricing Methodology

- **CPO Hosting Service** – CPO will host the CPOtracker system and provide all the required hardware and software. Client authorized personnel will have access via any computer connected to the Internet. Client's plan supporting documents, information and plans will reside on CPO's web server. Therefore, they will always be off-site and accessible no matter what happens to Client's hardware and/or facility. CPO will apply all enhancement and release updates. A CPOtracker Help Desk is included for the term of the subscription.
  - Pricing** - A subscription license is available for 1 to 3 years. A 2 or 3 year subscription provides a multi-year discount. The amount of the subscription fee depends upon how many Locations and Teams/Plans you need to start with. You can add Locations and Team/Plans anytime in the future.
- **Client Hosting Service** – For the Client preferring to purchase and host the system themselves on their web server, a perpetual license is available. Client is responsible for all hardware and software and will apply all enhancement and release updates.
  - Pricing** - The purchase of a perpetual license includes Annual Support Services for the first year and is optional each year thereafter. Annual Support Services includes a CPOtracker Help Desk, Technical Support and all enhancements and release updates. After the first year, Annual Support Services is optional at 15% of the retail purchase price. Multi-year purchases allow the total purchase price to be spread over the term of the license. The purchase price is determined by how many Locations and Teams/Plans you need. You can add Locations and Team/Plans anytime in the future.



*Contingency Planning & Outsourcing, Inc.*

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

Whether you are just now starting to address preparedness regarding Disaster Recovery, Business Continuity, COOP or Emergency Management, or currently have plans you need to maintain, CPO is the company and CPOtracker is the tool.

For a live and personal demonstration, contact your CPO Representative or CPO directly:

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[Tim.Lord@CPOtracker.com](mailto:Tim.Lord@CPOtracker.com)