Welcome to your Quick Tour!

Goal: To see how easy it is to copy a process from the Community Folder and make it your own!

Objective: In 15 minutes or less, copy and edit a process from the Community.  Learn to edit and create new roles for your Sample Team and assign tasks from your new process to those roles.

Plan:

Step 1: Log in – less than 1 minute

Step 2: Copy from the Community – 2 minutes

Step 3: View the Process -  1 minute

Step 4: Edit the Team -  6 minute

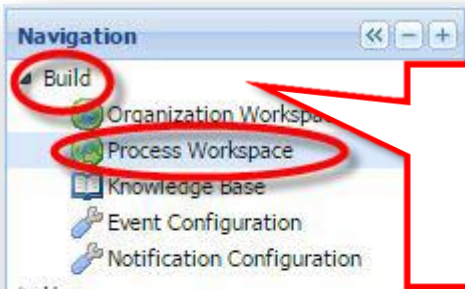Step 5: Edit the Process – 4 minute

Step 6: Make it LIVE! – less than 1 minute

Note:  Our Support section has detailed videos and articles on every feature of our product.  The quick tour is to get your feet wet before the big dive!  And in case you need it, we provide swimming lesson for every level, beginner to advanced!

**Step 1: Log in!**  Return to your activation email if you have not created your password and log in directly from that link.

If your account is created, login [here](here)

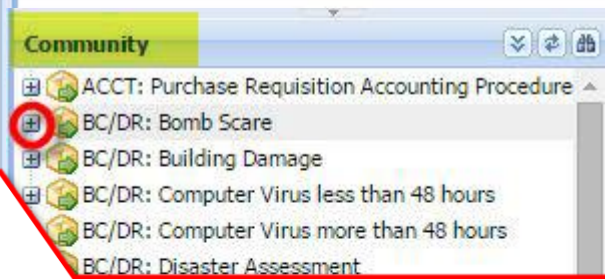**Step 2: Enter Process Workspace & Check out the Community!**

Click the **Build Menu** Item
Click **Process Workspace** Item
Your Community Folder awaits you!
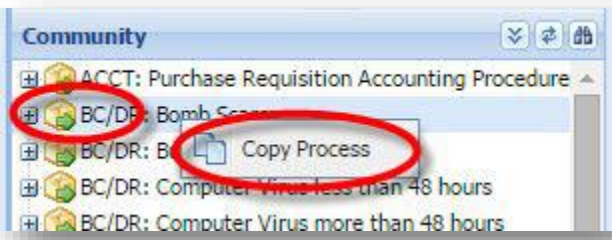
Click the "+" to see task names of any process in the Community Folder.   Let's look at BC/DR Bomb Scare.

Right click on **Bomb Scare**
And Click **Copy Process**

Click **OK**

## Step 3: Let's View the Process in Your Under Construction Folder

Work Console | Process Workspace

« | Create Process →

Under Construction Process
 BC/DR: Bomb Scare

Team Process

Company Process

DRAG A PROCESS HERE FROM UNDER CONSTRUCTION O
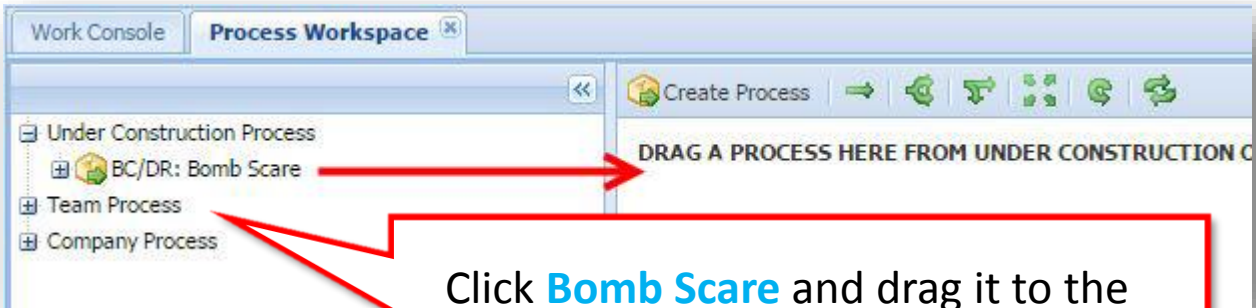
Click **Bomb Scare** and drag it to the workspace and release when you see the **green check mark**.

**Edit BC/DR: Bomb Scare**

Task View | Table View

Name: BC/DR: Bomb Scare

Description: Tahoma

Process Description: This process lists the steps to managing a Bomb Scare on location.

Suggested Team: Business Continuity Management Team

Suggested Roles:

Admin= Administrative
BCM = Business Continuity Management
BF= Business Functions
CDS = Corporate Director Systems Business Office

Please note: The content in this process is not intended to answer specific questions or suggest suitability of action in a particular case. This template is a suggestion to support creation of your custom process.

Owner: Sample Team

A process description appears providing you suggested team name and roles. We'd like to show you how to add those roles and change your team name right now...then come back to edit the process.

## Step 4: Edit Sample Team to match the suggested roles.
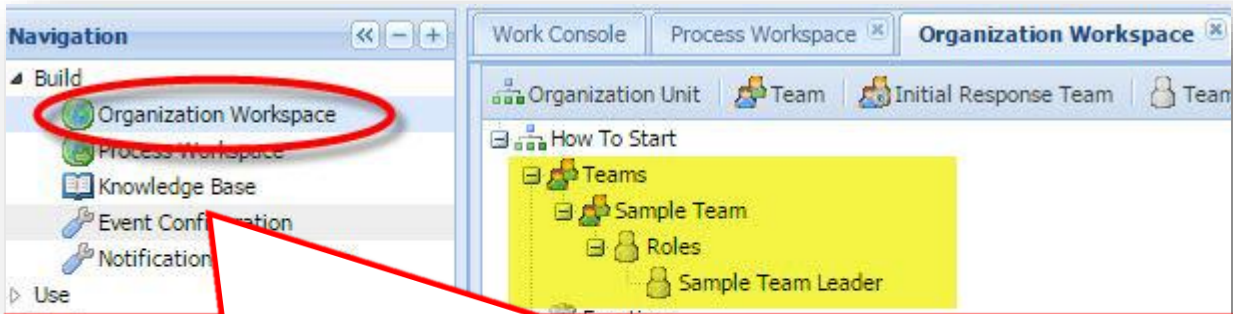
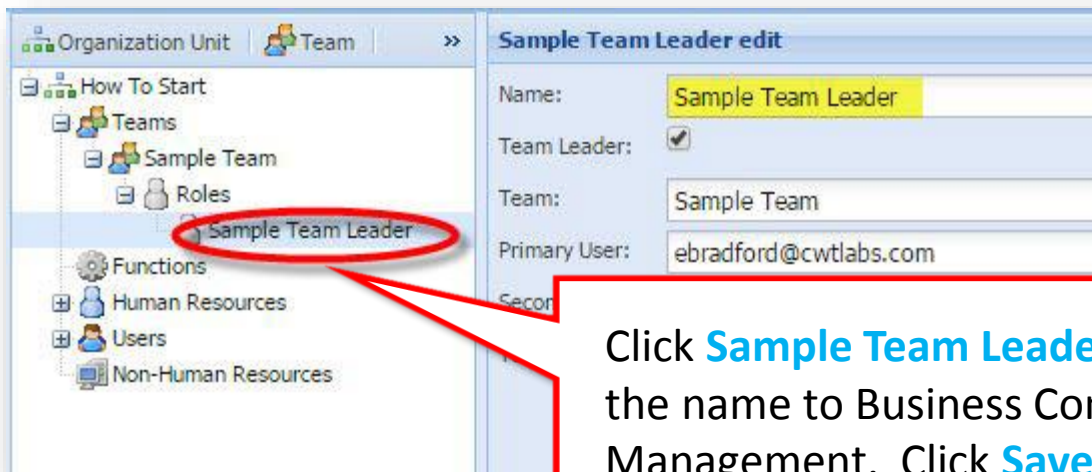In the Build menu, Click **Organization Workspace**.  Here is your Sample Team.  Let's edit and add to it!
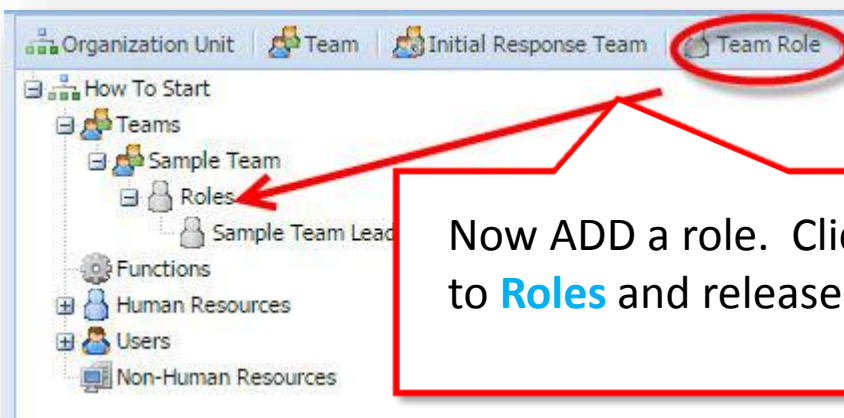
Suggested Roles:

Admin= Administrative
BCM = Business Continuity Management
BF= Business Functions
CDS = Corporate Director Systems Business Office

Here are your suggested roles

Click **Sample Team Leader** and change the name to Business Continuity Management.  Click **Save** and **OK**

Now ADD a role.  Click **Team Role** and drag to **Roles** and release when you see a "**+**"
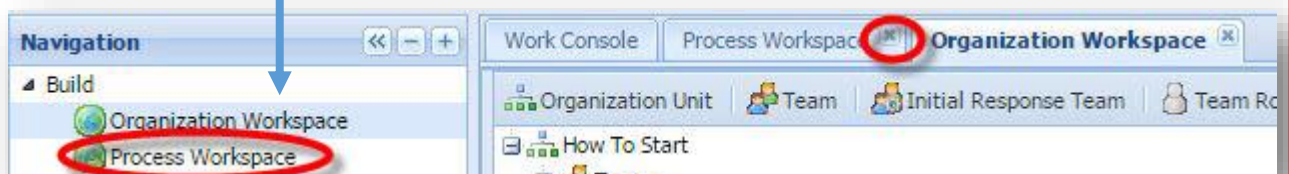
A form appears. Create Administration and assign yourself as the primary user, Click **Save** & **OK**. Repeat for the other 2 roles.
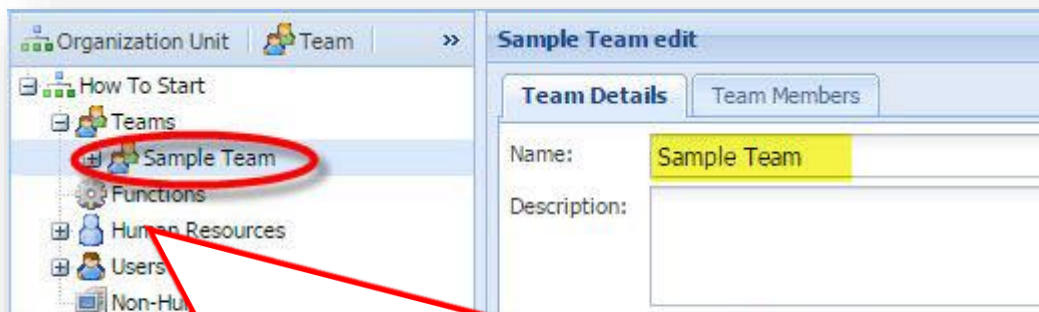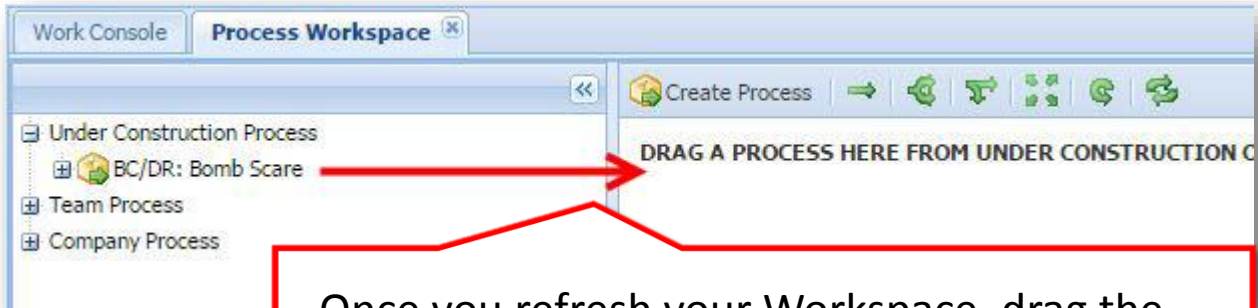


Click **Sample Team** to change the name to Business Continuity Team. Click **Save** & **OK**.
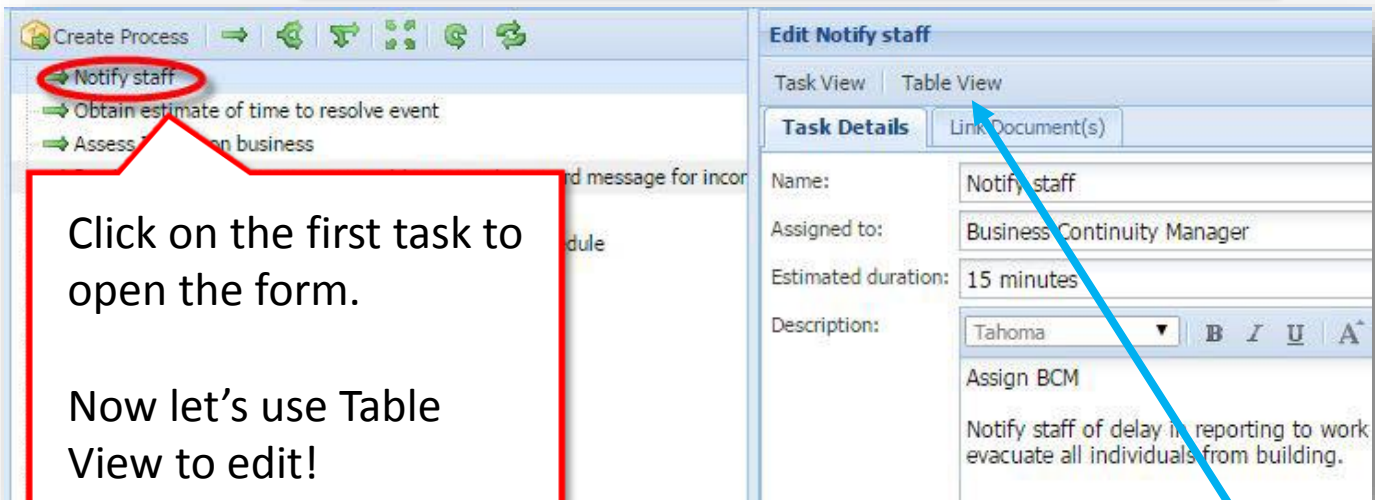


Refresh Process Workspace by closing the tab and reopening it.
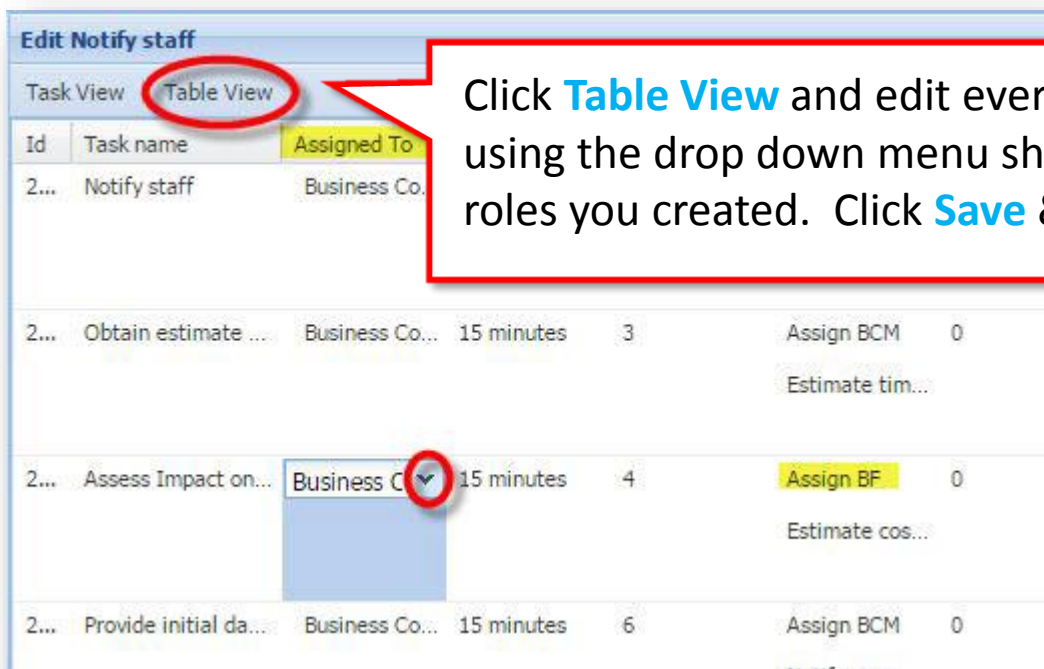
## Step 5: Edit Process – Assign tasks to new roles.

Work Console | **Process Workspace** ⊠

⟨⟨ | 🔲 Create Process | ➡ | 🔴 | 🔻 | 🔳 | 🟢 | 🔄

☐ Under Construction Process
   ⊞ 🔳 BC/DR: Bomb Scare ──────────→ DRAG A PROCESS HERE FROM UNDER CONSTRUCTION (
⊞ Team Process
⊞ Company Process

Once you refresh your Workspace, drag the process from its folder again.

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🔲 Create Process | ➡ | 🔴 | 🔻 | 🔳 | 🟢 | 🔄     **Edit Notify staff**

➡ Notify staff            Task View | Table View
➡ Obtain estimate of time to resolve event
➡ Assess ___ on business       **Task Details** | Link Document(s)

         rd message for incor   Name:      Notify staff

Click on the first task to open the form.     dule    Assigned to:   Business Continuity Manager

               Estimated duration: 15 minutes

Now let's use Table View to edit!    Description:   Tahoma      ▼   **B** *I* U A

                  Assign BCM

                  Notify staff of delay in reporting to work
                  evacuate all individuals from building.

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**Edit Notify staff**

Task View | Table View        Click **Table View** and edit every role using the drop down menu showing the roles you created. Click **Save** & **OK**.

| Id | Task name | Assigned To | | | | | |
|----|-----------|-------------|---|---|---|---|---|
| 2... | Notify staff | Business Co. | | | | | |
| 2... | Obtain estimate ... | Business Co... | 15 minutes | 3 | | Assign BCM | 0 |
| | | | | | | Estimate tim... | |
| 2... | Assess Impact on... | Business C ⊙ | 15 minutes | 4 | | Assign BF | 0 |
| | | | | | | Estimate cos... | |
| 2... | Provide initial da... | Business Co... | 15 minutes | 6 | | Assign BCM | 0 |

## Step 6: Make it LIVE! (When you are done editing, that is!)
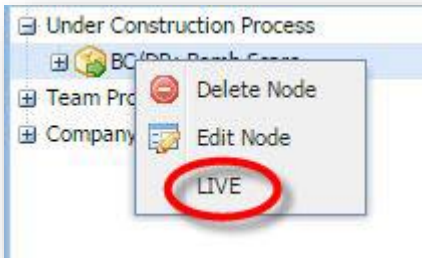
Right click on your process and click **LIVE** and **OK**.
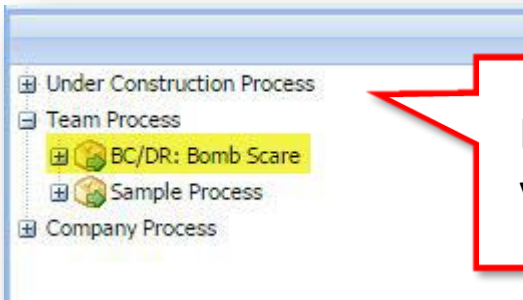
Now it's part of your team's folder and you can run it!

Click here to watch more videos on the community, building your organization and processes.