

Onspring



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UNIVERSITY OF MEMPHIS – BCDR IMPLEMENTATION

REVISED APRIL 27, 2026

Contents

- Contents..... 2**
- Introduction..... 4**
 - Solution Overview4
- Access Overview..... 4**
 - BCDR Coordinator4
 - BCDR User5
- Log In and Navigation..... 5**
 - Log In5
 - Log Out5
 - Saving a Record5
 - Navigation6
- Status Overview 7**
 - BCDR Plans Statuses7
 - BCDR Test Scenario Statuses.....7
 - BCDR Plan Activation Statuses8
- BCDR Landing Page Dashboard 9**
- BCDR Global View Dashboard 9**
- BCDR Management Dashboard 10**
- Department Attestations Dashboard 11**
- Business Hierarchy Dashboard..... 11**
- Creating a BCDR Plan 12**
 - Click 'Create a New Plan' Button12
 - Saving Initial BCDR Plan Record12
 - Complete the Overview Tab13
 - Complete the Critical Functions Tab.....13
 - Complete the Information Technology Tab.....14
 - Complete the Faculty Preparedness Tab15
 - Complete the Key Resources Tab16
 - Complete the Documentation Tab17

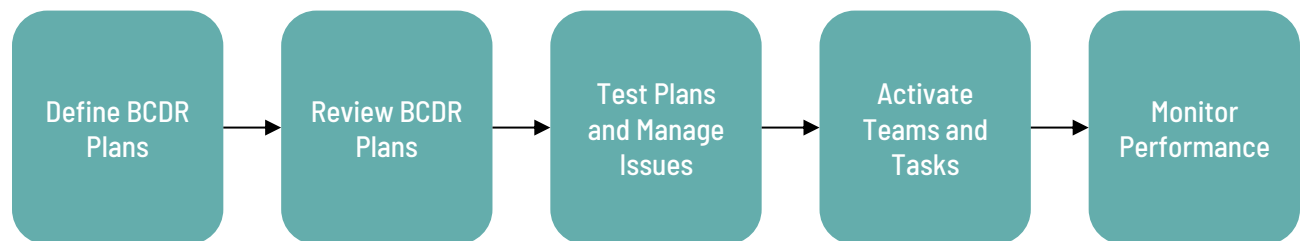
Submitting Initial Plan.....	18
Reviewing a BCDR Plan	19
Submitting a BCDR Plan into Review Workflow (Manually).....	19
BCDR Plan Review Overview.....	19
Completing Plan Owner Review	20
Completing Plan Reviewer Review.....	21
Review Workflow History	22
Generate a BCDR Plan Document.....	22
Activating BCDR Plans	23
Create Local BCDR Tasks.....	23
Activate a Plan	24
Complete Activated BCDR Tasks	25
Perform Post Plan Review.....	26
Testing BCDR Plans	26
Create BCDR Testing Scenarios.....	26
Create BCDR Test Results.....	27
BCDR Plan Retirement.....	28
Retire a Plan	28
Managing Business Hierarchy	28
Create a Division	28
Saving Initial Division Record.....	29
Create a Department.....	29
Saving Initial Department Record	29
Complete the Details Tab.....	30
Complete the Contacts Tab	31
Complete the Personnel & Buildings Tab	32
Complete the BCDR Tab.....	33
Complete the Attestation Reviews Tab	33

Introduction

The University of Memphis custom Continuity & Recovery (BCDR) Management solution enables you to assess and prioritize business impact, create and manage BCDR plans, perform plan testing and attestation, and activate plans when adverse events occur.

Solution Overview

The University of Memphis Continuity & Recovery (BCDR) Management solution is configured to support the following processes:



Each of these processes is covered in more detail throughout the guide below.

This guide has updated information for the configurations done before April 27th, 2026.

Access Overview

This section provides a summary of the different roles that are used across the University of Memphis’s custom BCDR solution.

BCDR Coordinator

App Permissions – Create, Read, Update, & Delete to all apps in the custom BCDR solution. Additionally, includes Version History and Report Administrator capabilities.

Administration Permissions – None

Security Permissions – None

NOTE: Role should be assigned to any individual who needs access to all content records related to the BCDR solution.

BCDR User

App Permissions – Create, Read, and Update rights to apps related to assigned BCDR Plans, Departments, and Divisions. Can only update records where they are assigned or related to the BCDR Plan or Department.

Administration Permissions – None

Security Permissions – None

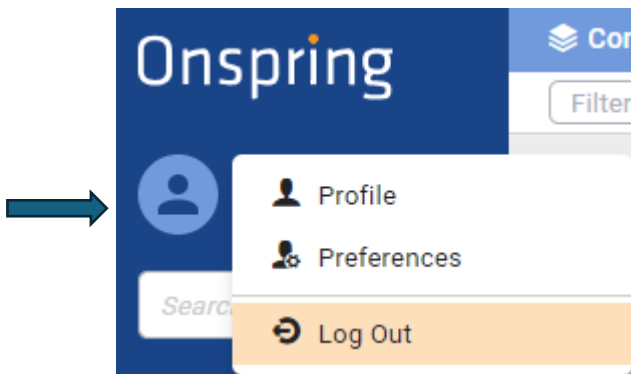
NOTE: Plan Owners, Plan Leaders, Department Heads, Department Head Managers, Division Heads, and Secondary Division Heads should be assigned this role.

Log In and Navigation

Log In

Login URL: <https://memphis.onspring.com/>

Log Out



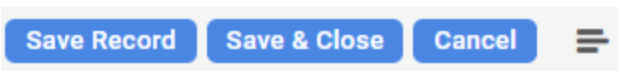
To log out, click on the avatar by your name and select Log Out. It is not necessary to log out before closing your browser window.

Saving a Record

You can see these buttons in the top right of your screen when you are inside of a record within Onspring.



Click edit record when you want to make an update/change. When you are editing and interacting with records, it is important to save the record before leaving to a new page.



You can toggle through tabs without needing to save, but you will need to save your changes before canceling out or refreshing the page. Save Record will produce a save and keep you on the current page. Save & Close will produce a save and take you to your previous page. Cancel will not save your work and take you to the previous page.

Navigation

On the left-hand side of your screen, you will see a control panel.



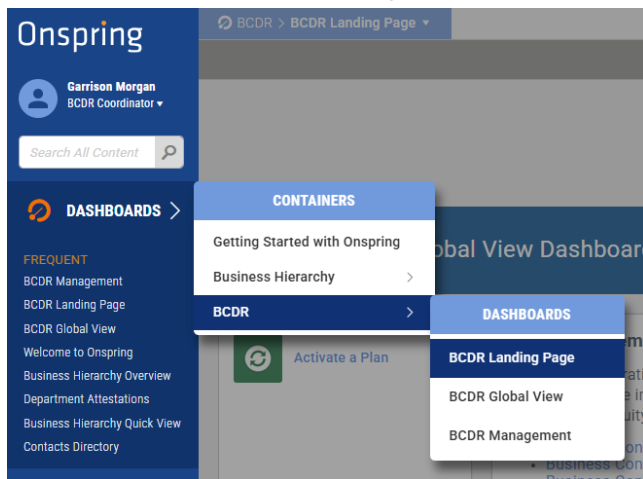
For this user guide you will be working out of either the BCDR Coordinator or BCDR User role. If you have other roles, you will be able to switch between them by clicking the drop-down carrot. Other roles will give you additional access and capabilities in the Onspring System.

If you are feeling lost, help is not far away. Click the "?" in the bottom left corner to be taken to Onspring's Help Center. If you want more information on how the Onspring system works. There are many helpful topics discussed such as FAQ's and navigation videos.

<https://memphis.onspring.com/Help/Content/Home.htm>



Select Dashboards, BCDR, and your desired dashboard to navigate to other pages.



Status Overview

In each app we use status fields to help categorize each record. These status fields are used heavily to drive the reports and key metrics that are seen on your dashboard. We filter records in or out of reports and key metrics based on the status values.

BCDR Plans Statuses

The Overall Plan Status field can be found at the top of a BCDR Plan record in the Continuity and Recovery Plan Profile floating section. It is a formulated field, meaning other fields in the BCDR Plan record drive what value this field will return. The values below are listed:

Draft

Draft – A new BCDR Plan has been created but pending submission. The Submission Status field has a value of 'In Process'.

Review in Process

Review in Process – The BCDR Plan is currently in the review workflow.

Compliant

Compliant – The BCDR Plan has been submitted and is currently active. The record is not in Onspring workflow.

Awaiting Test

Awaiting Test – The BCDR Plan has not been tested, testing required, or testing in process.

Retired

Retired – The BCDR Plan is retired. The Retire Plan field has a value of 'Retire Plan'.

BCDR Test Scenario Statuses

The Overall Test Scenario Status field can be found in the Test Information section. It is a formulated field, meaning other fields in the BCDR Test Scenario record drive what value this field will return. The values below are listed:

No Tests Performed

No Tests Performed – Test Scenario record has been created but there are no test results.

Test In Process

Test In Process – An associated Test Result record is currently being tested.

Due for Test

Due for Test – Test Scenario has an associated Test Result with a Next Test Date before today's date.

Current

Current – Test Scenario is current. Nothing is needed in relation to the associated Test Result records.

BCDR Plan Activation Statuses

The Overall Status field can be found at the top of a BCDR Plan Activation record in the Activation Details section. It is a formulated field, meaning other fields in the BCDR Plan Activation record drive what the value that this field will return. The values below are listed:

Not Activated

Not Activated – The BCDR Plan Activation has been created but the Activation Type and Activation Details have not been provided. BCDR Tasks will be automatically created on save.

In Process

In Process – The BCDR Plan Activation record has activated tasks that have still not been completed by the associated primary owners.

Awaiting Post Plan Review

Awaiting Post Plan Review – All associated BCDR Activated Tasks have been marked as completed. Pending the Reviewer to complete the Plan Completion Result field.

Complete

Complete – All tasks have been completed and the Plan Completion Result field has filled out by the Reviewer.

BCDR Landing Page Dashboard

The BCDR Landing Page dashboard gives BCDR users a place to view records associated to them such as Departments, Divisions, BCDR Plans, Test Scenarios, Attestations, Tasks, and Action Items. Additionally, users have quick links at the top to additional information and ability to navigate to other dashboards. Users can quickly activate a BCDR Plan from this dashboard.

BCDR > BCDR Landing Page

Business Continuity / Disaster Recovery

THE UNIVERSITY OF MEMPHIS

Go to BCDR Global View Dashboard → Go to BCDR Management Dashboard → Go to Business Hierarchy Overview Dashboard →

Activate a Plan

Crisis Management

As part of preparation for an event that adversely effects the operations of the University, we are implementing the process to develop and maintain Memphis Ready Business Continuity Plans.

- Business Continuity Disaster Recovery FAQs
- Business Continuity Disaster Recovery Critical Function Determination
- Business Continuity Disaster Recovery Definitions
- Business Continuity Disaster Recovery Planning
- Instruction and Planning Form [Coming Soon]
- Sample BCDR Plan for Guidance [Coming Soon]

Additional References

- University Coronavirus Response Site
- Police Services
- University Crisis Management Plan
- One-Stop access to U.S. Government Center for Disease Control
- Shelby County Health Department

My Departments

Department N...	Division	Department Head	Department He...	BCDR Plan Owner	BCDR Plan Revi...
ONSPRING TEST DEPARTMENT	ONSPRING TEST DIVISION	Garrison Morgan	Garrison Morgan	Sri Prahalathan	Meri Williams

1 item

My Divisions

Name	Division Head	Secondary Division Head
ONSPRING TEST DIVISION	Garrison Morgan	Garrison Morgan

1 item

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BCDR Global View Dashboard

The BCDR Global View dashboard allows BCDR users to see high level reports in relation to the UofM BCDR program. There are different reports for Departments, BCDR Plans, Critical Functions, Test Scenarios, and Tasks.

BCDR > BCDR Global View

Division (no filter criteria) Department (no filter criteria)

BCDR Management

THE UNIVERSITY OF MEMPHIS

All Departments and BCDR Plans

Department Name	Division	Department Head	Department Head Manager	BCDR Plan Owner	BCDR Plan Reviewer	Status
AA/Provost Office	President	David Russomanno	Bill Hardgrave			Active
Academic Advising Center	AA	Dale Williams	Eric Bailey			Active
Accounting Office	Business and Finance	Shirley Ford				Active
Admissions and Recruitment	AA	Kyle Nixon	Brian Meredith			Active
Advancement Engagement	Advancement	Kimberly Grantham	Tara Jones			Active
Animal Care Facility	Research	Donny Ray	Jasbir Dhallwal			Active
Anthropology	AA	Kathryn Hicks	Gary Emmert			Active
Architecture	AA	Michael Hagge	Debra Burns			Active
Art and Design	AA	Matthew Gaynor	Debra Burns			Active
Art Museum	AA	Leslie Luebbbers	Debra Burns			Active
Associate CIO ITS	ITS	Bernard McGhee	Jeff Delaney			Active
Athletic Administration	Athletics	Edward Scott				Active
Athletic Business Office	Athletics	Haley Prewett	Edward Scott			Active

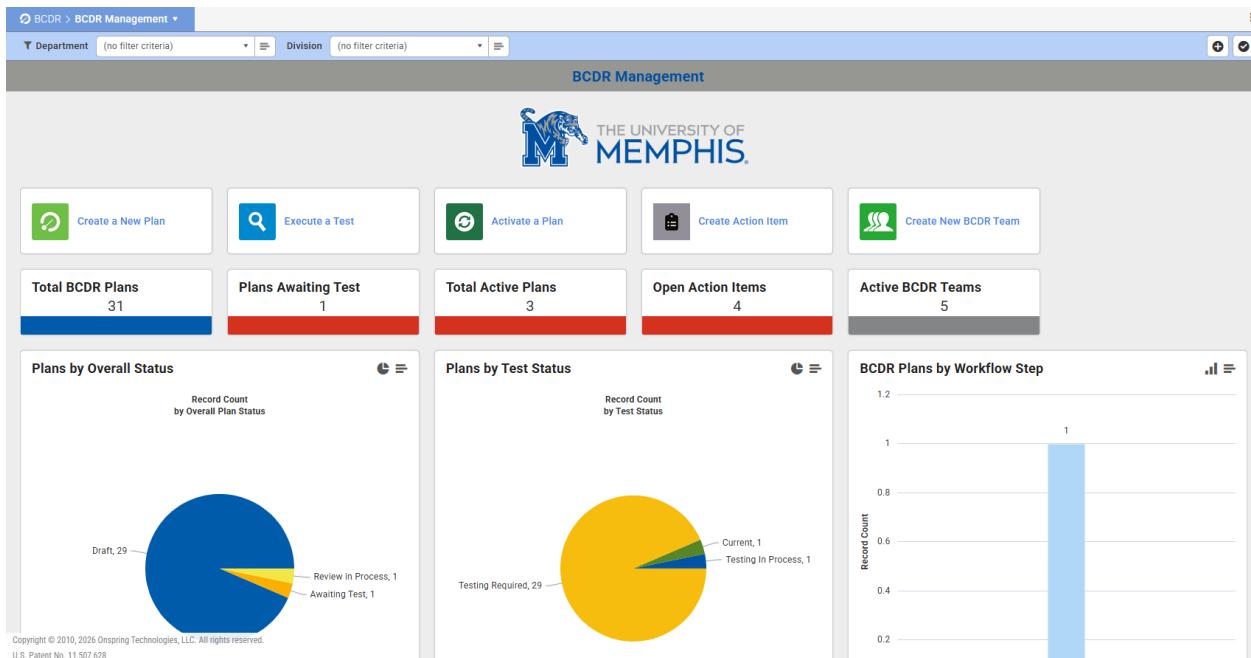
164 items

Departments with Related Companies

Department Name	Division	Cost Center	Department Head	Department Head Manager	Status
-----------------	----------	-------------	-----------------	-------------------------	--------

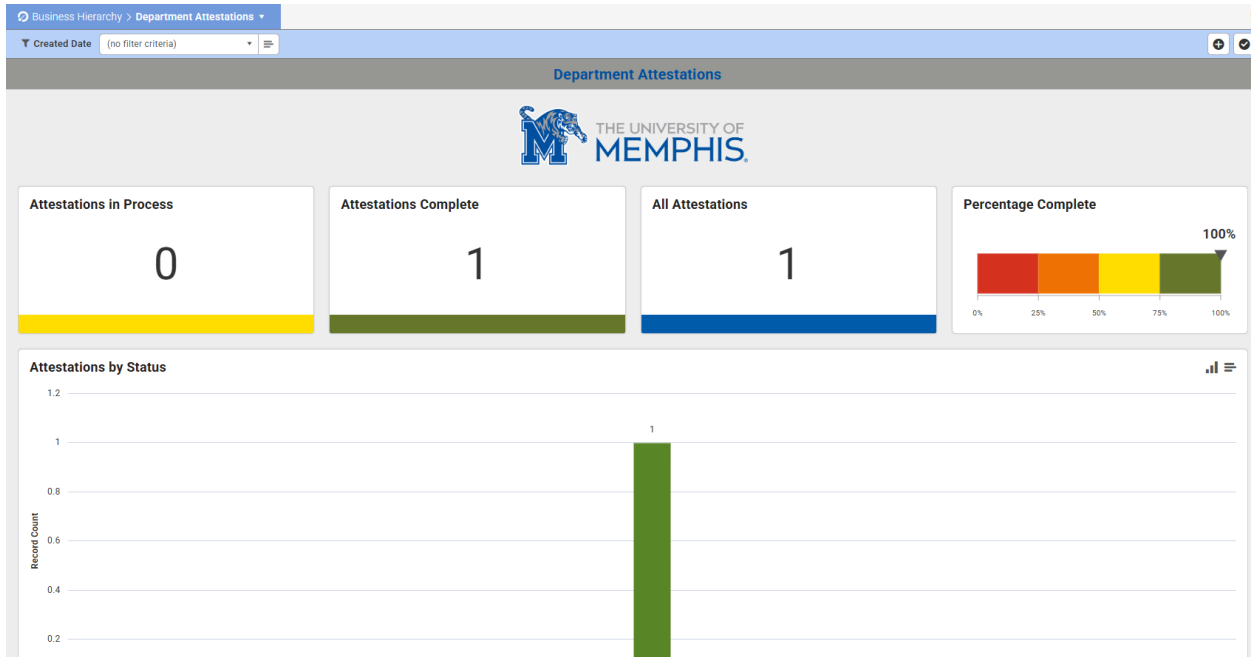
BCDR Management Dashboard

The BCDR Management dashboard allows BCDR users a view to see BCDR Plans by Overall Status, Test Status, and Workflow Step. Additionally, you are able to see different Activations, Tasks by Owner, and Test Scenarios by Status. You are also able to quickly add new content for BCDR Plans, Tests, Plan Activations, Action Items, and Teams.



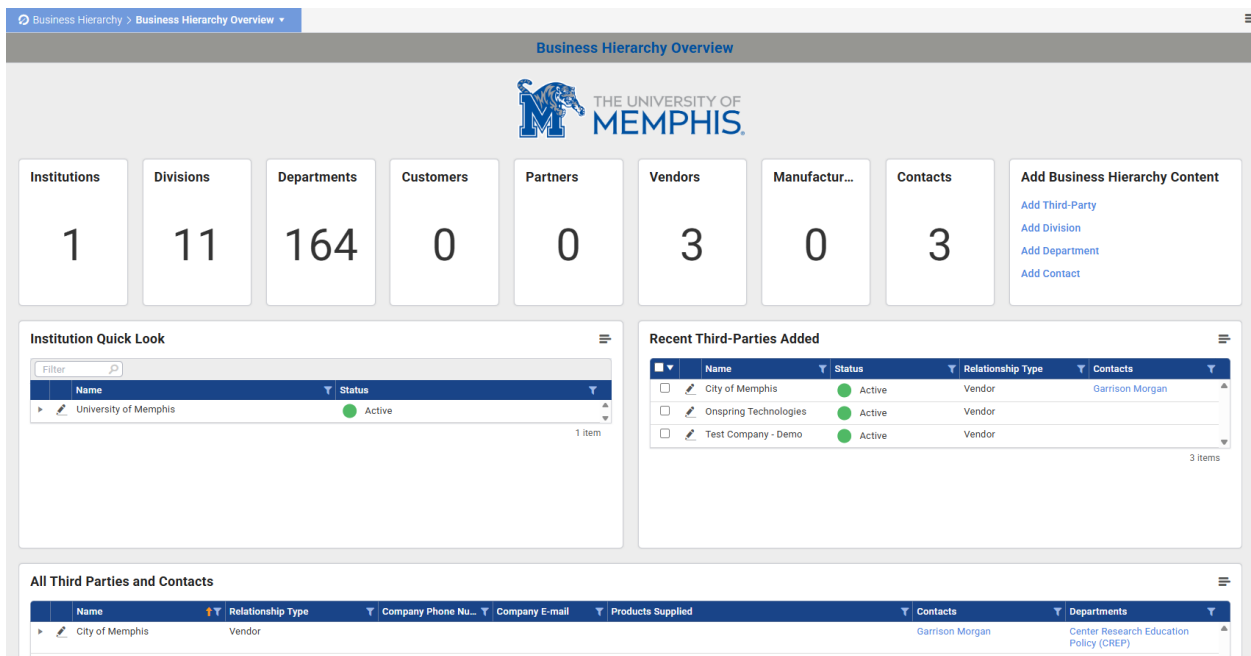
Department Attestations Dashboard

The Department Attestations dashboard allows BCDR Coordinators a way to track attestations for the different departments.



Business Hierarchy Dashboard

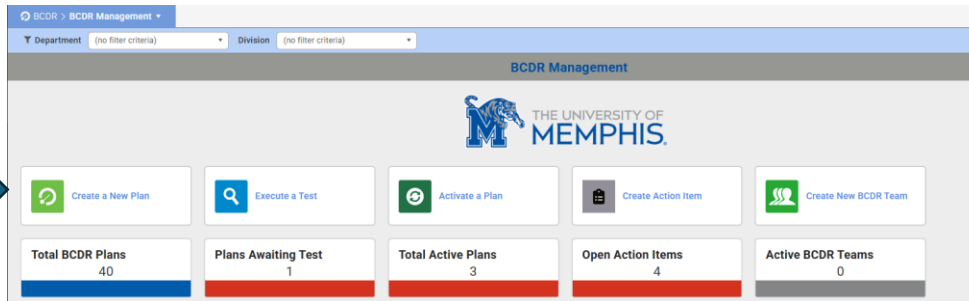
The Business Hierarchy Dashboard gives a snapshot of the different applications making up the UofM business hierarchy such as Companies, Divisions, Departments, Vendors, and Contacts.



Creating a BCDR Plan

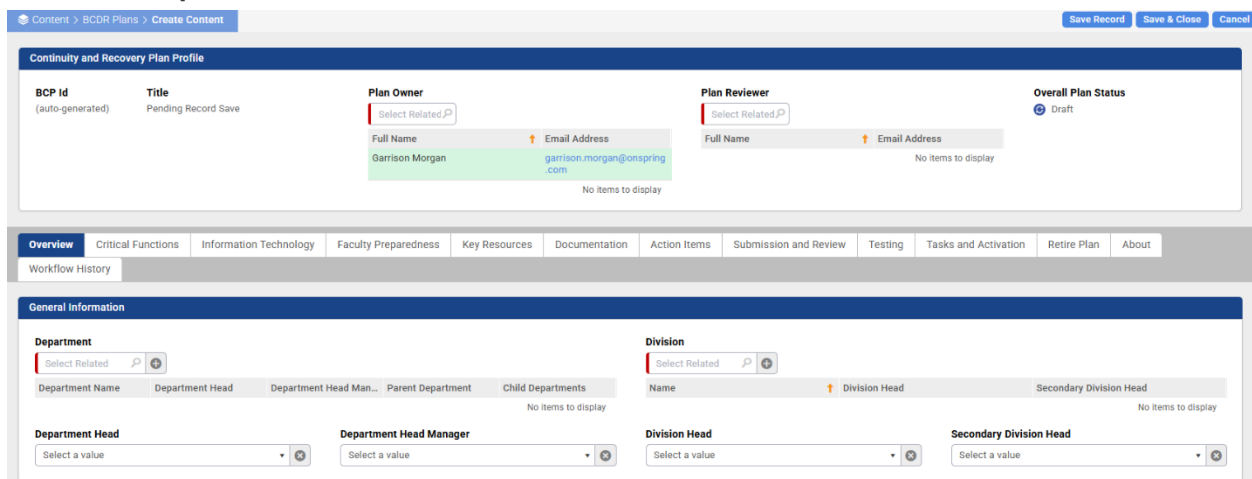
Click 'Create a New Plan' Button

This button will be displayed on the **BCDR Management** dashboard for BCDR Coordinators. It will take you to a new BCDR Plan content record where you can start adding information.



Saving Initial BCDR Plan Record

As a BCDR Coordinator or System Administrator you will be tasked with creating new plans as needed. To save the record, you will need to fill out all required fields on the **Overview** tab, indicated by the vertical red line to the left of each field. These fields include **Plan Owner**, **Plan Reviewer**, **Department**, and **Division**.



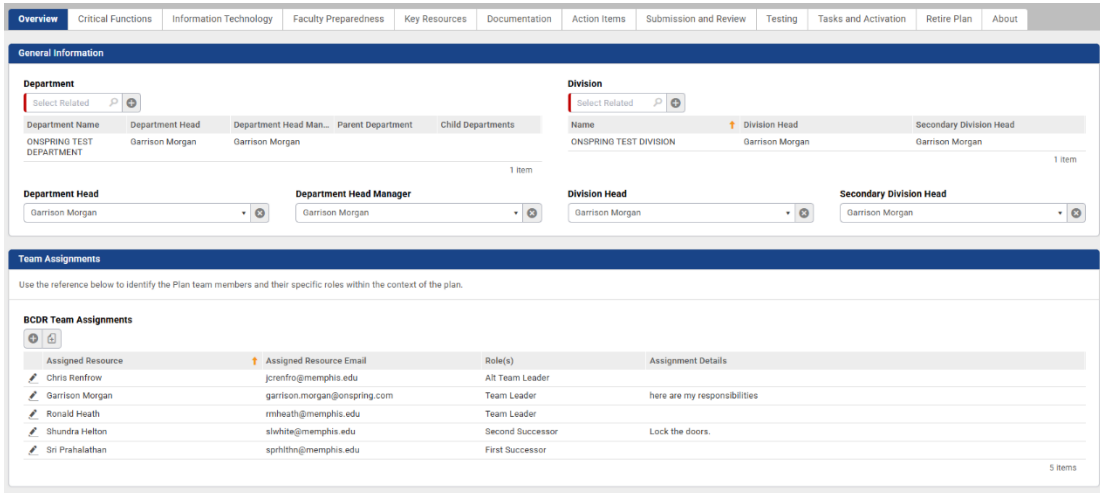
Once all required information has been entered, click 'Save Record' in the top right of the record.



Complete the Overview Tab

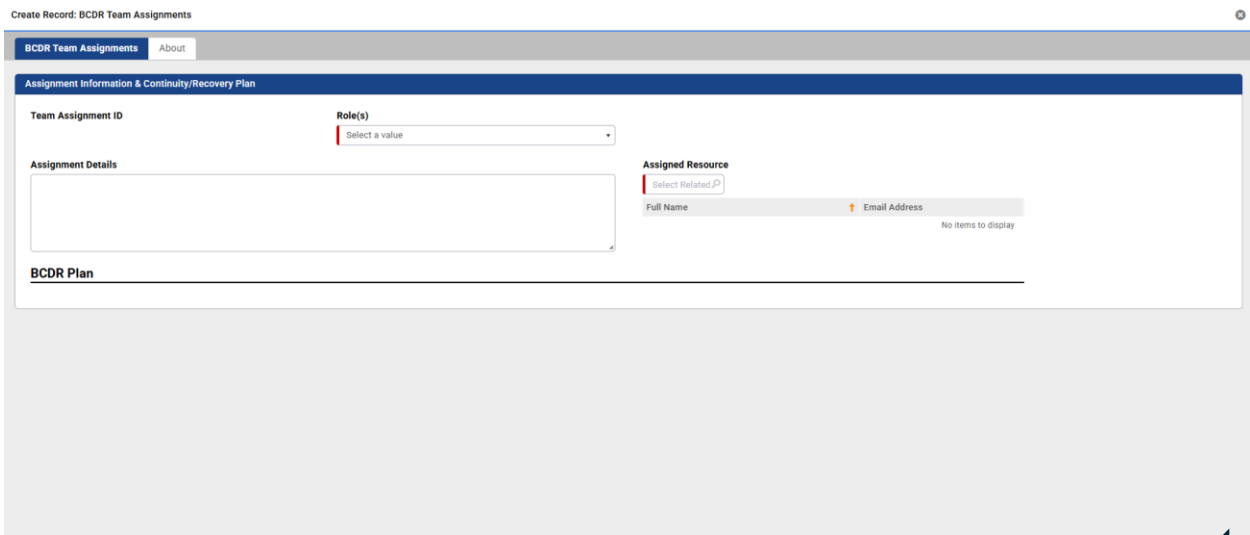
On the **Overview** tab, fill out all the fields in both the **General Information** and **Team Assignment** sections. The **Department Head**, **Department Head Manager**, **Division Head**, and **Division Head Manager** fields automatically populate from users related to the associated **Department** and **Division** records.

You can create a **BCDR Team Assignment** record by clicking the “+” sign.



Assigned Resource	Assigned Resource Email	Role(s)	Assignment Details
Chris Renfrow	jcrenfo@memphis.edu	Alt Team Leader	
Garrison Morgan	garrison.morgan@onspring.com	Team Leader	here are my responsibilities
Ronald Heath	rhealth@memphis.edu	Team Leader	
Shundra Helton	shwhite@memphis.edu	Second Successor	Lock the doors.
Sri Prahalathan	sprihith@memphis.edu	First Successor	

Fill out the required fields and click Save in the bottom right of the screen.



Team Assignment ID:

Role(s):

Assignment Details:

Assigned Resource:

Full Name: Email Address:


BCDR Plan:

Save

Complete the Critical Functions Tab


On the **Critical Functions** tab, you will need to create records for any related critical functions to the BCDR plan.

You can create a **Critical Function** record by clicking the “+” sign.



Name	Description	Responsible Person(s)	Peak Periods	Recovery Time Objective	Function Type
Business Continuity Planning (BCP)	Develop and provide continuous review of the University's business continuity plans for recovery decision making, communications, and critical departmental processes in order to return the University to normal operations post-incident or crisis. This CF also involves partnering with the campus community to review and revise disaster recovery plans for physical locations with critical assets.	Ronald Heath	June October	1 - 4 Hours	1 - Critical
Risk Assessment & Management	Risk Assessment is a process to identify potential hazards and analyze what could happen if a hazard occurs. Broadly speaking, a risk assessment is the combined effort of: 1) identifying and analyzing potential (future) events that may negatively impact individuals, assets, and/or the environment (i.e. hazard analysis), and; 2) making judgments "on the tolerability of the risk on the basis of a risk analysis" while considering influencing factors. As such, a risk assessment determines possible mishaps, their likelihood and consequences, and the tolerances for such events. The results of this process may be expressed in a quantitative or qualitative fashion. Risk assessment is an inherent part of a broader risk management strategy to help reduce any potential risk-related consequences for the University.	Ronald Heath	All Year	4 - 24 Hours	1 - Critical

Fill out the required fields and click Save in the bottom right of the screen.



Create Record: Critical Functions

About Overview Action Items

Details

Name: Peak Periods:

Who performs this?: Responsible Person(s): Function Type:

Description:

Comment:

Documents

Drag and drop here to upload to Onspring

Add Attachments Download All

Name	Type	Added	Modified	Owner	Notes
No files have been attached					

Save

Add as many **Critical Function** records as needed for your BCDR Plan.

Complete the Information Technology Tab

On the **Information Technology** tab, you will need to create records for applications that are relevant to the department's BCDR plan.

You can create a **Department Applications** record by clicking the “+” sign.

Overview Critical Functions **Information Technology** Faculty Preparedness Key Resources Documentation Action Items Submission and Review Testing Tasks and Activation Retire Plan About

Department Applications

Select applications that are relevant to your department. These could be department or central IT applications.

Department Applications

Application or System	Criticality Level	Comment
Onspring Technologies	1 - Critical	
Microsoft 365 (Email/Outlook, Teams, OneDrive, SharePoint)	2 - Priority	
Kuali Software	3 - Important	
Microsoft Suite	3 - Important	
Modern Campus CMS	3 - Important	
Onspring Department Test	3 - Important	

6 Items

Department Application Documentation

Drag and drop here to upload to Onspring

Add Attachments Download All

Name

No files have been attached



Fill out the fields and click Save in the bottom right of the screen.

Create Record: BCDR Plan Applications

About **BCDR Application**

Application or System Lookup

Use the Existing Application or System field to search the existing departments applications on file.

Existing Application or System

Select Related

Ownership Type	Name	Description	Application Owner	Related Department(s)
No items to display				

Can't find what you are looking for under Existing Applications or System? Check the Add Application or System checkbox under Application or System Help. A new section will be displayed where the new application or system information can be provided.

Application or System Help

Add Application or System

Criticality Rating

Critical - Cannot pause. Necessary to life, health, security. (Possible example: police dispatch system)

Priority - Failure will lead to imminent & very serious consequences. (Possible examples: data networks, email system, patient scheduling system, medical records system)

Important - Can endure a pause, but ONLY for a short time. Must be recovered by some time sooner than 30 days. (Possible examples: financial system, payroll system, HR system, research administration systems, student systems, library systems, courseware)

Deferrable - Important, but we can function without this system for more than 30 days. (Possible examples: calendaring application, document imaging system, budget)

Criticality Level

Select a value

Comment

Select a value

Save



Add as many **Department Application** records as needed for your BCDR Plan. Additionally, you can add any relevant documentation into the **Department Application Documentation** field at the bottom of the tab.

Complete the Faculty Preparedness Tab

On the Faculty Preparedness tab, you will answer four questions in the four text boxes provided.

Overview	Critical Functions	Information Technology	Faculty Preparedness	Key Resources	Documentation	Action Items	Submission and Review	Testing	Tasks and Activation	Retire Plan	About
----------	--------------------	------------------------	-----------------------------	---------------	---------------	--------------	-----------------------	---------	----------------------	-------------	-------

Faculty Preparedness

What is your plan to be able to move all faculty to remote instruction?

Do you have a plan or process in place to access a faculty member(s) instructional materials and grade book both online and on-ground quickly should the faculty member become inaccessible during the semester?

What is your succession plan? In the event you lose a faculty/staff member(s), how do you maintain an efficient and effective operation?

Do you have an evacuation plan in place for both your office and classroom space? Please refer to the University Crisis Management Plan for additional details on formulating a plan.

FP #1
Faculty will use the LMS "Announcements" tool and University email as the primary channels for communicating changes to students within 4 hours of a disaster declaration.

FP #2
Department Chairs and Program Directors will be granted "Administrative" or "Observer" roles within all LMS course shells at the start of each semester.

FP #3
Each essential administrative function (e.g., payroll approval, student registration overrides) must have at least one primary staff member and one designated "back-up" trained in the process.

FP #4
Faculty are the designated "Safety Leads" for their current classroom. Upon hearing an alarm, faculty will direct students to the nearest exit and to the designated Departmental Assembly Point (as identified in the University Crisis Management Plan).

Complete the Key Resources Tab

On the Key Resources tab, fill out all the fields in the **Staff Basics**, **Teams**, **Equipment and Supplies**, and **Facilities and Transportation** sections.

Overview	Critical Functions	Information Technology	Faculty Preparedness	Key Resources	Documentation	Action Items	Submission and Review	Testing	Tasks and Activation	Retire Plan	About
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Workflow History

Staff Basics

Does your unit have a (printed) emergency contact list for faculty & staff?

Who holds copies of the emergency contact list? (Be specific)

Who updates the emergency contact list?

Who knows how to check messages on your department's main phone line?

Who knows how to record a greeting on your department's main phone line?

Who can post messages on your department's web site (i.e. do the actual mechanics)?

Do your staff use any shared passwords that should be kept available?

Staff Basics Comments

Teams

These are important teams on which departmental faculty and/or staff participate.

BCDR Teams

Select Related

Name	Purpose	Additional Comment
Clery Committee	Ensure Regulatory Compliance and Best Practices	Clery Act Regulations and Reporting
Crisis Management Team	Serve Post Event or Incident to Aid Response and Recovery Efforts to Return the University to Normal Operations in Timely Manner	Team Consists of Primarily Business & Finance Staff
Minors on Campus	Evaluate, Approve, and Regulate activities involving minors on UofM campuses and properties.	Chairman - Sally Parrish Co-Chairman - R. Mark Heath

3 items

You can create an **Equipment & Supplies** record by clicking the "+" sign.

Equipment and Supplies

Minimum equipment needed to carry out all critical functions.

Equipment & Supplies

Name	Minimum Number	Additional Comment
Copier	0	Copy Room, Admin Bldg, Room 367
Fax	0	N/A
Laptop Computer (car charger advised)	1	Office Workstation in Admin Bldg, Room 367A
Printer	2	Office Workstation Admin Bldg, Room 367A Copy Room, Admin Bldg, Room 367
Scanner	1	Office Workstation Admin Bldg, Room 367A Copy Room, Admin Bldg, Room 367
Server	0	N/A
Telephone (hard-wired)	1	Office Workstation in Admin Bldg, Room 367A
Workstation (includes desktop computer, network connection, table, chair)	1	Office Workstation in Admin Bldg, Room 367A

8 Items

Facilities and Transportation

Please list any special facilities or transportation needs outside of normal utilities (i.e. AC, Natural Gas, Internet, Electric)

Special Facilities Needs

Special Transportation Needs

Fill out the fields and click Save in the bottom right of the screen.

Create Record: Equipment & Supplies

About **Equipment & Supplies**

Related BCDR Plan

Title	Plan Owner	Plan Reviewer	Test Status	Overall Plan Status
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Sri Prahalathan	Meri Williams	Testing In Process	Awaiting Test

No items to display

Details

Name

Minimum Number

Additional Comment

Save Cancel

Add as many **Equipment and Supplies** records as needed for your BCDR Plan.

Complete the Documentation Tab

On the **Documentation** tab, provide any supporting documentation in the **Document Repository** or **Attachments** tabs. Documents can be uploaded to the **Document Repository** by clicking the "+" sign.

Overview Critical Functions Information Technology Faculty Preparedness Key Resources **Documentation** Action Items Submission and Review Testing Tasks and Activation Retire Plan About

Workflow History

Document Repository

Upload documentation that is specific to your plan. This could include floorplans, schematics, etc.

Document Repository

Select Related

Name	Type	Description
No Items to display		

Attachments

BCDR Plan Documents

Drag and drop here to upload to Onspring

Add Attachments Download All

Name	Type	Added	Owner	Notes
Business and Finance - Bus Continuity and Risk Management - UofM BCDR Plan.pdf	PDF Document	4/13/2026 7:19 AM	Garrison Morgan	
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT - UofM BCDR Plan.docx	Word Document	4/13/2026 9:47 AM	Garrison Morgan	

Fill out the fields and click Save in the bottom right of the screen.

Create Record: Document Repository

Attachments About

Document Information

Name

Source
Continuity and Recovery Plan

Owner
Select Related

Type
General

Status
No Expiration

Useful Life
Week(s)

Expiration Date

Description

Document Access
Select Related

Attachments

Drag and drop here to upload to Onspring

Add Attachments Download All

Name	Type	Added	Modified	Owner	Notes
No files have been attached					

Save Cancel

Additionally, the Department Plan documents that are generated will be automatically added to the **BCDR Plan Documents** field.

Submitting Initial Plan

On the **Submission and Review** tab, update the Submission Status from In Process to Submitted. Save the Record. Note this will automatically update the Submission Date field to the current date and set the **Overall Plan Status** to **Awaiting Test**.

Continuity and Recovery Plan Profile

BCP Id: BCP-7 | Title: Business and Finance - Environmental Health and Safety

Plan Owner: Ronald Heath (Email: rmheath@memphis.edu)

Plan Reviewer: Ronald Heath (Email: rmheath@memphis.edu)

Overall Plan Status: Awaiting Test

Submission Status: Submitted (4/30/2026)

Reviewing a BCDR Plan

Submitting a BCDR Plan into Review Workflow (Manually)

BCDR Coordinators and System Administrators can manually submit BCDR Plan records into the review workflow.

Plan Review

Last Review Date: [Calendar icon]

Plan Review Frequency: 1 Year(s)

Next Review Date: [Calendar icon]

Review Status: Pending Initial Review

Submit For Review Workflow: [Checked]

Select **Submit For Review Workflow** in the Plan Review section and save record in the top right. The **Overall Plan Status** will be updated to **Review in Process**.

Optionally, comments can be left to the Plan Owner for initial review by clicking 'Add Enrollment Comments' at this point. Click Save to begin the BCDR Plan review.

Workflow Enrollment [Close]

If saved, this record will be enrolled in workflow.

[Add Enrollment Comments](#)

Save **Cancel**

BCDR Plan Review Overview

BCDR Plan records that are enrolled into workflow have two steps they can be routed based off the approval and rejection. All enrolled records start with the Plan Owner step. Once approved, from the Plan Owner, the record moves to the Plan Reviewer step. The Plan Reviewer can either approve to Finish or reject back to the Plan Owner step. If rejected, the Plan Owner would then resubmit it back to the Plan Reviewer. See the workflow diagram below:



Completing Plan Owner Review

Plan Owner is the first step in the BCDR Plan review process. The user listed in the **Plan Owner** field in the **Continuity and Recovery Plan Profile** floating section at the top of the record will have access to update the majority of the BCDR Plan.

Continuity and Recovery Plan Profile

BCP id	Title	Plan Owner	Plan Reviewer	Overall Plan Status
BCP-1	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Full Name Garrison Morgan Email Address garrison.morgan@onspring.com	Select Related Full Name Garrison Morgan Email Address garrison.morgan@onspring.com	Review in Process

Overview | Critical Functions | Information Technology | Faculty Preparedness | Key Resources | Documentation | Action Items | Submission and Review | Testing | Tasks and Activation | About | Workflow History

General Information

Department					Division		
Department Name	Department Head	Department Head Man...	Parent Department	Child Departments	Name	Division Head	Secondary Division Head
ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan			ONSPRING TEST DIVISION	Garrison Morgan	Garrison Morgan

Department Head
Garrison Morgan

Department Head Manager
Garrison Morgan

Division Head
Garrison Morgan

Secondary Division Head
Garrison Morgan

Review the **Overview**, **Critical Functions**, **Information Technology**, **Faculty Preparedness**, **Key Resources**, **Documentation**, **Action Items**, **Testing**, and **Tasks and Activation** tabs.

After the **Plan Owner** has finished his/her review, Save the Record and hit 'Approve' in the top to send to Plan Reviewer for review.



Optionally, add a comment in the pop-up window and click Submit to complete this step.

Approve > ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT

Approved By Garrison Morgan

Previous Step START

Current Step Plan Owner

Next Step Plan Reviewer

Comments

Completing Plan Reviewer Review

Plan Reviewer is the second step in the BCDR Plan review process. The user(s) listed in the **Plan Reviewer** field in the **Continuity and Recovery Plan Profile** floating section at the top of the record will have access to update the majority of the BCDR Plan.

The screenshot shows the 'Plan Reviewer' interface for a BCDR Plan. At the top, there is a navigation bar with 'Content > BCDR Plans > ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT' and a 'Saved: 5/1/2026 3:37 PM' indicator. Below this is a 'Plan Reviewer' header with 'Approve' and 'Reject' buttons. The main content area is titled 'Continuity and Recovery Plan Profile' and contains a table with columns for 'BCP Id', 'Title', 'Plan Owner', 'Plan Reviewer', and 'Overall Plan Status'. The 'Plan Reviewer' field is highlighted with a red box and shows a dropdown menu with 'Select Related...' and 'Garrison Morgan' (with email address 'garrison.morgan@onspring.com'). Below this is a 'General Information' section with tabs for 'Overview', 'Critical Functions', 'Information Technology', 'Faculty Preparedness', 'Key Resources', 'Documentation', 'Action Items', 'Submission and Review', 'Testing', 'Tasks and Activation', 'About', and 'Workflow History'. The 'General Information' section contains details for 'Department' and 'Division'.

Review the **Overview, Critical Functions, Information Technology, Faculty Preparedness, Key Resources, Documentation, Action Items, Testing, and Tasks and Activation** tabs.

To send the BCDR Plan back to the **Plan Owner** for additional work, Click 'Reject' to notify the Plan Owner and grant them access to edit the BCDR Plan record.



Add a comment in the pop-up window and click Submit to complete this step.

The screenshot shows a 'Reject' pop-up window for the 'ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT'. It contains the following information: 'Rejected By: Garrison Morgan', 'Previous Step: Plan Owner', 'Current Step: Plan Reviewer', and 'Next Step: Plan Owner'. There is a 'Comments' field with a placeholder text 'Required notes to the Plan Owner about rejection here'. At the bottom, there are 'Submit' and 'Cancel' buttons.

Click 'Approve' to finish the BCDR Plan review.



Optionally, add a comment in the pop-up window and click Submit to complete this step.

Approve > **ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT** ✕

Approved By Garrison Morgan

Previous Step Plan Owner

Current Step Plan Reviewer

Next Step FINISH

Comments

Review Workflow History

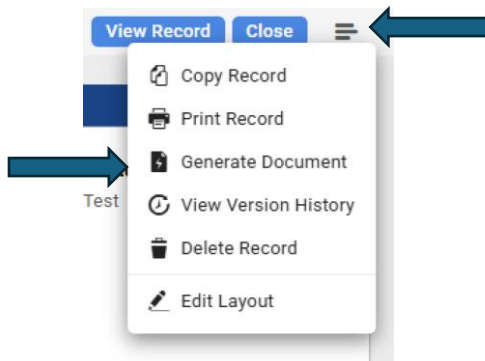
Navigate to the Workflow History tab. In the History Information section you can see all prior information related to workflow approvals, rejections, and comments.

Step	User	Date/Time	Type	To Step	Comments
Plan Reviewer	Garrison Morgan	5/1/2026 3:41 PM	Approval	FINISH	
Plan Owner	Garrison Morgan	5/1/2026 3:37 PM	Approval	Plan Reviewer	
START	Garrison Morgan	4/30/2026 2:14 PM	Enrollment	Plan Owner	
Plan Reviewer	Garrison Morgan	3/24/2026 1:32 PM	Approval	FINISH	
Plan Owner	Garrison Morgan	3/24/2026 1:24 PM	Approval	Plan Reviewer	Hey I made updates to the BCDR Teams app and these other fields
Plan Reviewer	Garrison Morgan	3/24/2026 1:24 PM	Rejection	Plan Owner	reject
Plan Owner	Garrison Morgan	3/24/2026 1:21 PM	Approval	Plan Reviewer	I have updated this and ready for Plan Reviewer review
START	Garrison Morgan	3/24/2026 1:21 PM	Enrollment	Plan Owner	

14 Items

Generate a BCDR Plan Document

Click the action menu in the top right of the BCDR Plan record. Click **Generate Document**.



Fill out the fields for the **Generate Dynamic Document** pop up.

Generate Dynamic Document ✕

Select the desired options, then click OK to generate the document.

Note: The options below are determined by your administrator and may vary from one dynamic document to another.

File Type

Document Action

Email Delivery

Attachment Field

Message Center Settings Message Center Alerts Only

If you selected the Save to an attachment field option, after 10-15 seconds refresh your browser for the new dynamic document to appear in the **BCDR Plan Documents** attachment field on the **Documentation** tab. Review the word document.

Activating BCDR Plans

Create Local BCDR Tasks

Within a BCDR Plan record, navigate to the **Tasks and Activation** tab. You can create tasks for the plan by clicking the "+" sign. These tasks will be used during the activation of a BCDR plan.

Workflow History

Overview Critical Functions Information Technology Faculty Preparedness Key Resources Documentation Action Items Submission and Review Testing **Tasks and Activation** Retire Plan About

BCDR Tasks

Create Tasks from Library BCDR Task Type

BCDR Tasks

Task ID	Task Description	Primary Task Owner	Related Group (for backup)	Sequence Number	Time to Complete
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT - Damage & Impact Assessment	Conduct a rapid sweep of physical facilities, IT infrastructure, and personnel safety. Document what is "down," "degraded," or "functional" to determine which recovery tier to activate.	Garrison Morgan	Test BCDR Task Group	1	1 Hour(s)
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT - Departmental Roll Call & Status Reporting (EXAMPLE)	Activate the departmental phone tree or emergency messaging group to confirm the safety, location, and availability of all faculty, staff, and student workers. Report any unaccounted-for individuals to the central Emergency Operations Center (EOC) or campus police.	Garrison Morgan		1	60 Minute(s)
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT - Crisis Comm Tree Activation	Execute the pre-defined notification protocol. Alert the Disaster Recovery Team via out-of-band channels (e.g., SMS, dedicated app) and provide the initial bridge line/meeting link for the first briefing.	Garrison Morgan		2	30 Minute(s)
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT - Critical Function Triage & Continuity (EXAMPLE)	Evaluate the department's ability to perform its core functions (e.g., teaching, student advising, research, administration). Identify which operations must be immediately suspended, which will be shifted to workarounds (e.g., remote learning, paper-based processing), and reallocate available staff to the highest-	Garrison Morgan		2	2 Hour(s)

6 Items

Fill out the fields and click Save in the bottom right of the screen.

Create Record: BCDR Tasks

Task Overview | Activated Task Tracking | About

Task Overview

Task ID
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT

Sequence Number [input] **Time to Complete** [input] Minute(s)

Task Description [text area]

Task Title [input]

Primary Task Owner
[Select Related]

Full Name	Title	Email Address
No items to display		

Related Group (for backup)
[Select Related]

Name	Users
No items to display	

Supporting Attachments
[Drag and drop here to upload to Onspring] [Add Attachments] [Download All]

Name	Type	Added	Modified	Owner	Notes
No files have been attached					

Related BCDR Plan

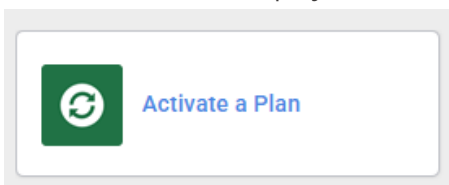
Related BCDR Plan
[Select Related]

Title	Plan Owner	Plan Reviewer	Overall Plan Status
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	Awaiting Test

Save Cancel

Activate a Plan

This button will be displayed on the **BCDR Landing Page** and **BCDR Management** dashboards.



It will take you to a new **BCDR Plan Activation Activities** content record where you will need to select the applicable **BCDR Plan** prior to saving the record.

Content > BCDR Plan Activation Activities > Create Content [Save Record] [Save & Close] [Cancel]

Activation Details

Activation Date
5/1/2026

Activated By
[Select Related]

Full Name	Email Address	Title
Garrison Morgan	garrison.morgan@onspring.com	

No items to display

Overall Status
⚠ Not Activated

Task Delegates
[Select Related]

Full Name	Email Address
No items to display	

BCDR Plan Activation | Post Plan Review | About

Related BCDR Plan

BCDR Plan
[Select Related]

Title	Plan Owner	Plan Reviewer	Plan Activation Status	Overall Plan Status
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	Open Activities	Awaiting Test

No items to display

After the record has been saved, local BCDR tasks will automatically be created in the **Activated BCDR Tasks** field.

Activated BCDR Tasks

BCDR Task Status	Tasks Percent Completion	Total Tasks	Completed Tasks	Total Tasks On Time	Total Non-Compliant Tasks
Tasks In Process	0%	6	0	0	6

Activated BCDR Tasks

Active Task	Title	Description	BCDR Plan	Primary Owner	Delegates	Target Completion	Status
16	Damage & Impact Assessment	Conduct a rapid sweep of physical facilities, IT infrastructure, and personnel safety. Document what is "down," "degraded," or "functional" to determine which recovery tier to activate.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	5/1/2026 5:11 PM	In Process
17	Crisis Comm Tree Activation	Execute the pre-defined notification protocol. Alert the Disaster Recovery Team via out-of-band channels (e.g., SMS, dedicated app) and provide the initial bridge line/meeting link for the first briefing.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan		5/1/2026 4:41 PM	In Process
18	Fallover Initiation (Critical Systems)	Transition Tier 1 applications to the secondary environment or cloud backup. This involves DNS redirection and verifying data integrity at the recovery site to ensure RTOs (Recovery Time Objectives) are met.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan		5/1/2026 8:11 PM	In Process

Complete Activated BCDR Tasks

The **Primary Owner** will be notified by email of his/her **Activated BCDR Task**. The email will include task details and targeted completion date/time. Clicking the link in the email will direct the Onspring user to the record.

Activated BCDR Task | References | About

Active Task Overview

Active Task Id: 16 | Order: 1.0 | Title: Damage & Impact Assessment | Target Completion Date/Time: 5/1/2026 5:11 PM | Task Activation Date: 5/1/2026 4:11 PM

Description

Conduct a rapid sweep of physical facilities, IT infrastructure, and personnel safety. Document what is "down," "degraded," or "functional" to determine which recovery tier to activate.

Primary Owner

Full Name	Title	Email Address
Garrison Morgan		garrison.morgan@onspring.com

1 item

Delegates

Full Name	Title	Email Address
Garrison Morgan		garrison.morgan@onspring.com

1 item

Related Group (for backup)

Name	Users
Test BCDR Task Group	Garrison Morgan

1 item

Supporting Attachments

Drag and drop here to upload to Onspring | Add Attachments | Download All

Name	Type	Added	Modified	Owner	Notes
Business and Finance - Bus Continuity and Risk Management - UoM BCDR Plan.pdf	PDF Document	5/1/2026 4:11 PM	4/13/2026 7:19 AM	Garrison Morgan	

Under **Task Execution**, update the **Status** to **Completed** or **Not Performed** and provide any **Execution Details**. Both **Closure Date** and **Completion Time Compliance** fields update automatically. Select Save Record in the top right.

Task Execution

Status

In Process

Completed

Not Performed

Closure Date

5/1/2026 4:13 PM

Completion Time Compliance

Compliant

Execution Details

Perform Post Plan Review

As a **Plan Owner** and **Plan Reviewer**, you will be able to track the **Activation Tasks** within the **Plan Activation** record. Once all activated tasks have been completed, **the Plan Owner** and **Plan Reviewer** will be able to review the activation activities.

Active Task	Title	Description	BCDR Plan	Primary Owner	Delegates	Target Completion	Status
16	Damage & Impact Assessment	Conduct a rapid sweep of physical facilities, IT infrastructure, and personnel safety. Document what is "down," "degraded," or "functional" to determine which recovery tier to activate.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	5/1/2026 5:11 PM	Completed
17	Crisis Comm Tree Activation	Execute the pre-defined notification protocol. Alert the Disaster Recovery Team via out-of-band channels (e.g., SMS, dedicated app) and provide the initial bridge line/meeting link for the first briefing.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan		5/1/2026 4:41 PM	Completed
18	Fallover Initiation (Critical Systems)	Transition Tier 1 applications to the secondary environment or cloud backup. This involves DNS redirection and verifying data integrity at the recovery site to ensure RTOs (Recovery Time Objectives) are met.	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan		5/1/2026 8:11 PM	Completed
19	Departmental Roll Call & Status Reporting (EXAMPLE)	Activate the departmental phone tree or emergency messaging group to confirm the safety, location, and availability of all faculty, staff, and student workers. Report	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan		5/1/2026 5:11 PM	Completed

Navigate to the **Post Plan Review** tab. Fill out the **Reviewer**, **Plan Completion Result**, and **Recommendation** fields. **The Post Plan Review Date** field will automatically populate with the current date. Save the record in the top right.

BCDR Plan Activation | **Post Plan Review** | About

Post Plan Review Details

Reviewer
Select Related [Search] [Add]

Full Name
Garrison Morgan
No items to display

Plan Completion Result [Needs Improvement] [Dropdown Arrow]

Post Plan Review Date [5/1/2026] [Calendar Icon]

Recommendations
here are the recommendations for next time

Testing BCDR Plans

Create BCDR Testing Scenarios

Within a BCDR Plan record, navigate to the **Testing** tab. You can create testing scenarios for the plan by clicking the "+" sign.

Overview Critical Functions Information Technology Faculty Preparedness Key Resources Documentation Action Items Submission and Review **Testing** Tasks and Activation Retire Plan About

Workflow History

BCDR Testing

Test Status
 Testing In Process

Next Required Test Date
 3/10/2026

BCDR Test Scenarios

Title	Test Type	Test Frequency	Test Plan Owner	Last Test Date	Next Test Date	Last Test Result	Overall Test Scenario Status
Table Top Exercise	Tabletop	2 Year(s)	Garrison Morgan	3/24/2026	3/24/2028	Passed	Testing In Process
Emergency Title	Emergency Drill	1 Year(s)	Garrison Morgan		3/10/2026	No Tests Performed	No Tests Performed

2 items

Fill out **Title**, **Test Type**, **Test Frequency**, **Test Requirements**, and **Test Plan Owner** required fields. Save the record in the bottom right. The Test Plan Owner will be notified via email.

Create Record: BCDR Test Scenarios

BCDR Test Scenario About

Related BCDR Plan

Title	Plan Owner	Plan Reviewer	Test Status	Overall Plan Status
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	Testing In Process	Awaiting Test

No items to display

Test Information

Title

Test Type

Test Frequency Year(s)

Overall Test Scenario Status No Tests Performed

Test Requirements

Test Results

Last Test Result No Tests Performed

Last Test Date

Next Test Date 3/10/2026

BCDR Test Results

Record Id	Test Requirements	Test Date	Performed By	Test Result
-----------	-------------------	-----------	--------------	-------------

Save Cancel

Create BCDR Test Results

Within a **BCDR Test Scenario** record, navigate to the **Test Information** section. You can create test results for the testing scenario by clicking the "+" sign.

Test Results

Last Test Result No Tests Performed

Last Test Date

Next Test Date 2/6/2026

BCDR Test Results

Record Id	Test Requirements	Test Result
-----------	-------------------	-------------

No items to display

Complete the fields in the **Test Result Information** section. Update the **Test Result** and save the record in the bottom right.

Create Record: BCDR Test Results

Test Result About

Related Test Scenario

BCDR Test Scenario	Related BCDR Plan	Test Type	Test Plan Owner	Test Frequency	Overall Test Scenario Status
Table Top Exercise	ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Tabletop	Garrison Morgan	2 Year(s)	Test In Process

No items to display

Test Result Information

Test Requirements
Every 2 years each unit performs a table top exercise

Testing Overview

Supporting Information

Supporting Information

Drag and drop here to upload to Onspring

Add Attachments Download All

Name	Type	Added	Modified	Owner	Notes
No files have been attached					

Save Cancel

BCDR Plan Retirement

Retire a Plan

Navigate to the **Retire Plan** tab. Select **Retire Plan**. Save record in the top right. Note the **Overall Plan Status** is now **Retired**.

Continuity and Recovery Plan Profile

BCP Id BCP-1	Title ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Plan Owner Select Related Full Name Garrison Morgan Email Address garrison.morgan@onspring.com	Plan Reviewer Select Related Full Name Garrison Morgan Email Address garrison.morgan@onspring.com	Overall Plan Status Retired
-----------------	--	---	--	--------------------------------

1 item 1 item

Overview Critical Functions Information Technology Faculty Preparedness Key Resources Documentation Action Items Submission and Review Testing Tasks and Activation **Retire Plan** About

Workflow History

Retire Plan

Set the flag below to 'Retire Plan' to set this Plan to a state of Retired.

Retire Plan
Retire Plan

Managing Business Hierarchy

Create a Division

This button will be displayed on the **Business Hierarchy** dashboard for BCDR Coordinators and System Administrators. It will take you to a new **Division** content record where you can start adding information.

Business Hierarchy Overview

THE UNIVERSITY OF MEMPHIS

Institutions	Divisions	Departments	Customers	Partners	Vendors	Manufactur...	Contacts	Add Business Hierarchy Content
1	11	164	0	0	3	0	3	Add Third-Party Add Division Add Department Add Contact

Saving Initial Division Record

To save the record, you will need to fill out all required fields on the **Division Profile** tab, indicated by the vertical red line to the left of each field. These fields include **Name**, **Institution**, and **Status**.

Content > Divisions > Create Content

Save Record Save & Close Cancel

Division Profile

Name

Institution

Hierarchy

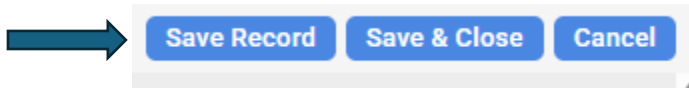
Cost Center

Status

Division Head

Secondary Division Head

Once all required information has been entered, click 'Save Record' in the top right of the record.



Create a Department

This button will be displayed on the **Business Hierarchy** dashboard for BCDR Coordinators and System Administrators. It will take you to a new Department content record where you can start adding information.

Business Hierarchy Overview

THE UNIVERSITY OF MEMPHIS

Institutions	Divisions	Departments	Customers	Partners	Vendors	Manufactur...	Contacts	Add Business Hierarchy Content
1	11	164	0	0	3	0	3	Add Third-Party Add Division Add Department Add Contact

Saving Initial Department Record

To save the record, you will need to fill out all required fields on the **Department Profile** tab, indicated by the vertical red line to the left of each field. These fields include **Division** and **Status**.

Content > Departments > Create Content Save Record Save & Close Cancel

Details Contacts Personnel & Buildings BCDR Attestation Reviews About

Department Profile

Department Name **Division** **Hierarchy**
 Select a value Select a value No Institution Mapped > No Division Mapped > New Department

Department Head **Department Head Manager** **Institution** **Cost Center** **Status**
 Select a value Select a value Select a value [] Active

Additionally, you will need to enter the Department Name in the **Name - ADMIN** field on the **About** tab. This is to prevent any users from editing the Department Name once created.

Details Contacts Personnel & Buildings BCDR Attestation Reviews **About**

Record information

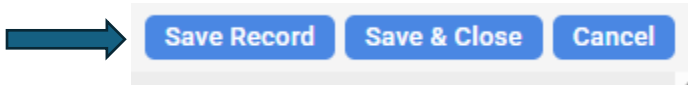
Record Information
 This section displays when the record was initially **Created** and when it was most recently **Updated**.
 The **Last Saved By** information pertains to when the record was last updated interactively by a user.

Created By
Created Date

ADMIN SECTION

Name - ADMIN
 []

Once all required information has been entered, click 'Save Record' in the top right of the record.



Complete the Details Tab

On the **Details** tab, fill out the **Department Head**, **Department Head Manager**, **Institution**, and **Description** fields. Additionally, indicate related **Departments** in the **Department Hierarchy** section.

Details | Contacts | Personnel & Buildings | BCDR | Attestation Reviews | About

Department Profile

Department Name
ONSPRING TEST DEPARTMENT

Division
ONSPRING TEST DIVISION

Hierarchy
University of Memphis > ONSPRING TEST DIVISION > ONSPRING TEST DEPARTMENT

Department Head
Garrison Morgan

Department Head Manager
Garrison Morgan

Institution
University of Memphis

Cost Center

Status
Active

Department Description

Description

This is a test division for the UAT demo

Department Hierarchy

Parent Department
Select a value

Child Departments
Select Related

Department Name	Department Head	Cost Center	Institution	Division	Status
No items to display					

Complete the Contacts Tab

On the **Contacts** tab, you will need to select users in both the Department Contacts and Institution Contacts fields.

Details | **Contacts** | Personnel & Buildings | BCDR | Attestation Reviews | About

Department Contacts

Select Related

Full Name	Email Address	Title	Status
Chris Renfrow	jcrenro@memphis.edu		Active
Ronald Heath	rmheath@memphis.edu		Active
Shundra Helton	slwhite@memphis.edu		Active

3 items

Key Institution Contacts

These are key contacts of other units within your institution whom you may need to contact.

Select Related

Full Name	Email Address	Title	Department	Status
Amanda Lambert-Pennington	almbtpr@memphis.edu			Inactive
Darla Keel	darkeel@memphis.edu		Registrar Office	Active
Debra Kelly	dikelly4@memphis.edu			Inactive
Eric Crites	ecrites@memphis.edu			Inactive
Ernest Nichols	enichols@memphis.edu			Inactive
Garrison Morgan	garrison.morgan@onspring.com			Active

6 items

Additionally, you can select existing Companies or create a **Companies** record by clicking the "+" sign.

Key External Companies & Contacts

These are external contacts (including vendors, clients, project partners, donors, sponsors, or other stakeholders) whom you may need to contact.

Select Related

Name	Company Type	Relationship Type	Products Supplied	Contacts
Onspring Technologies	Third-Party	Vendor		
Test Company - Demo	Third-Party	Vendor		

2 items



Fill out the required fields and click Save in the bottom right of the screen.

Create Record: Companies

Details About

Company Details

Company Id: New Company
Name:
Status: Active
Company Type: Third-Party
Company Logo:

DUNS Number:
FEIN Number:
Abbreviation/Acronym:
Relationship Type:

Website:
Number of Employees:
Company Phone Number:
Company E-mail:

Registered Address

Street Address:
City:
Country: United States of America
Region: North America (NA)

Street Address 2:
State/Province: Select a value
Postal Code:

Related Department

Departments

Select Related

Parent Department	Department Name	Child Departments	Department Head	Cost Center	Division	Status
	ONSPRING TEST DEPARTMENT		Garrison Morgan		ONSPRING TEST DIVISION	Active

Save

Add as many **Companies** records as needed for your Department.

Complete the Personnel & Buildings Tab

On the **Personnel & Buildings** tab, you will need to fill out both the **Personnel Count** and **Buildings** sections.

You can create a **Buildings** record by clicking the "+" sign.

Details Contacts **Personnel & Buildings** BCDR Attestation Reviews About

Personnel Count

Faculty and other academic appointees:
Residents/Fellows:
Staff (full-time):
Staff (part-time excluding students):
Student Staff:
Volunteers:
Guests:
Other:

Buildings

Evacuation plans for all buildings?: Select a value

Buildings

Building	Room Number	Notes
Administration Bldg	367	Room 367, Third Floor
Administration Bldg	test	

2 items

Fill out the required fields and click Save in the bottom right of the screen.

Related Department

Related Department	Parent Department	Child Departments	Department Head	Status
Department Name ONSPRING TEST DEPARTMENT	↑		Garrison Morgan	● Active

No items to display

About
Buildings

Details

Building ⌵

Select Related P

Building Name	Abbr. Name	Address 1	Building Code	Campus Code
No items to display				

Room Number

Notes

Save
C

Add as many **Buildings** records as needed for your Department.

Complete the BCDR Tab

On the **BCDR** tab, update users in the BCDR Plan Owner or BCDR Plan Reviewer fields to automatically update the users at the related plan for the department. Note only System Administrators and BCDR Coordinators will be able to assign BCDR Plans to a Department.

Details
Contacts
Personnel & Buildings
BCDR
Attestation Reviews
About

Related BCDR Plan

Updating the BCDR Plan Owner and BCDR Plan Reviewer will make the updates at the associated BCDR Plan record.

BCDR Plan Owner

Select Related P

Full Name	Email Address
No items to display	

BCDR Plan Reviewer

Select Related P

Full Name	Email Address
No items to display	

BCDR Plan ⌵ ⊕

Select Related P

Title	Plan Owner	Plan Reviewer	Last Review Date	Next Review Date	Test Status	Overall Plan Status
ONSPRING TEST DIVISION - ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	5/1/2026	5/1/2027	● Testing In Process	● Awaiting Test

1 item

Complete the Attestation Reviews Tab

On the **Attestation Reviews** tab, System Administrators and BCDR Coordinators will be able to set an **Attestation Frequency** and create **Department Attestations** to be sent to the **Department Head**. Additionally, the **OVERRIDE - Next Attestation Date** field can be used to change the value in the **Next Attestation Date** field, which the trigger to automatically create a new attestation is based off.

You can create a **Department Attestations** record by clicking the "+" sign.

Details | Contacts | Personnel & Buildings | BCDR | **Attestation Reviews** | About

Attestations

Attestation Status: ✔ Current | Last Attestation Completed Date: 4/13/2026 | Attestation Frequency: 6 Month(s) | Next Attestation Date: 10/13/2026 | OVERRIDE - Next Attestation Date:

Department Attestations

Created Date	Assigned Reviewer	Attestation Date	Attestation Past Due Flag	Attestation Review Due Da...	Attestation Status
4/13/2026 7:58 AM	Garrison Morgan	4/13/2026	❌	4/27/2026	✔ Attestation Complete

1 item



Department Heads will be sent an email of the **Department Attestation** record assigned to them. Update the **Attestation Status** to **Attestation Complete** and click save record to complete the assignment.

Content > Department Attestations > Saved: 4/28/2026 12:09 AM [View Record](#) [Close](#)

Attestation | About

Target Department

Department Name	Department Head	Department Head Manager	Division	Cost Center	Status
ONSPRING TEST DEPARTMENT	Garrison Morgan	Garrison Morgan	ONSPRING TEST DIVISION		✔ Active

1 item

Attestation

By setting the Attestation Status field to "Attestation Complete", you are certifying that the following statements are true:

- You have reviewed all critical details of the related Department
- You have validated the **Contacts** tab is up to date
- You have validated the **Personnel & Buildings** tab is up to date
- You have validated the BCDR Plan Owner and BCDR Plan Reviewer are up to date on the **BCDR** tab

Assigned Reviewer

Full Name	Email Address	Attestation Status	Attestation Date	Attestation Past Due Flag	Attestation Review Due Date
Garrison Morgan	garrison.morgan@onspring.com	✔ Attestation Complete	4/13/2026	❌	4/27/2026

1 item