



StanReady Reference Guide

Stanislaus State

Department of Safety & Risk Management



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Stanislaus State

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Introduction

Welcome to Stanislaus State's StanReady Reference Guide. This guide provides basic instructions on the minimum actions you should perform in order to get started creating, maintaining, and updating your department's business continuity plan.

System Basics

Accessibility

Stan Ready was designed with accessibility in mind. If you discover issues related to accessibility, please contact risk@csustan.edu and we'll work to resolve the issue as soon as possible.

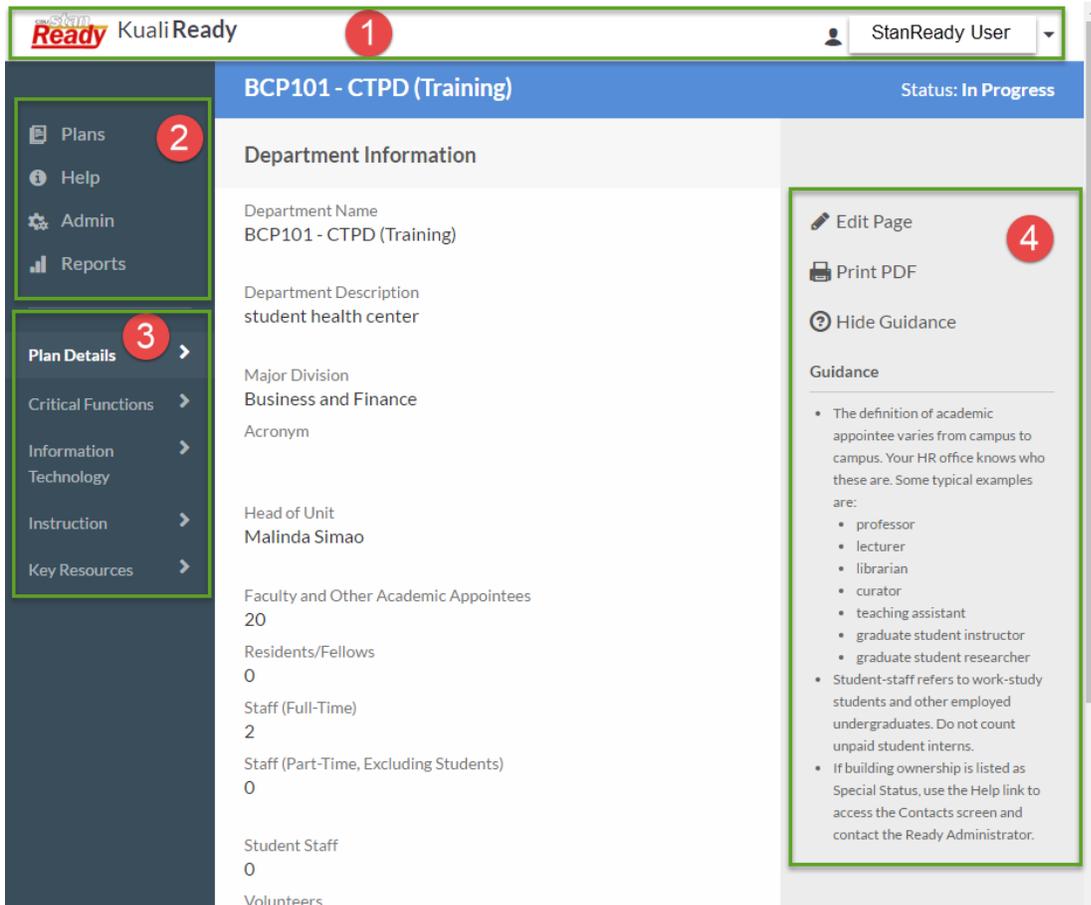
Mobile Devices

StanReady was designed to function across all devices and is responsive across multiple screen sizes.



Navigation

The StanReady system has four primary navigation components: (1) Banner, (2) Global Navigation, (3) Panel Navigation and the (4) Action Menu. All four are shown below.

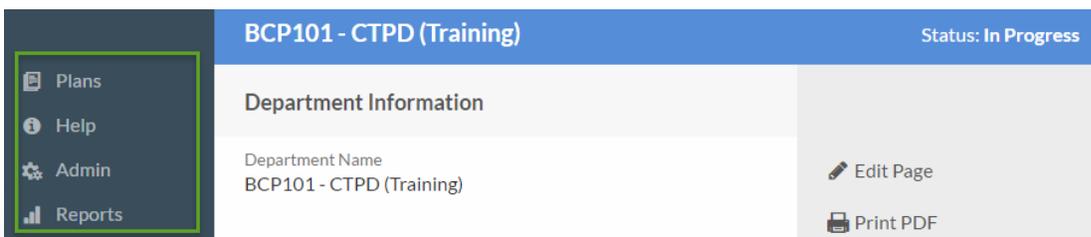


1. Banner

The top most part of the StanReady application contains the banner.

2. Global Navigation

The upper left hand side of each screen in StanReady contain the Global Navigation links. Global Navigation presents the same options on every screen you visit.



Plans Link

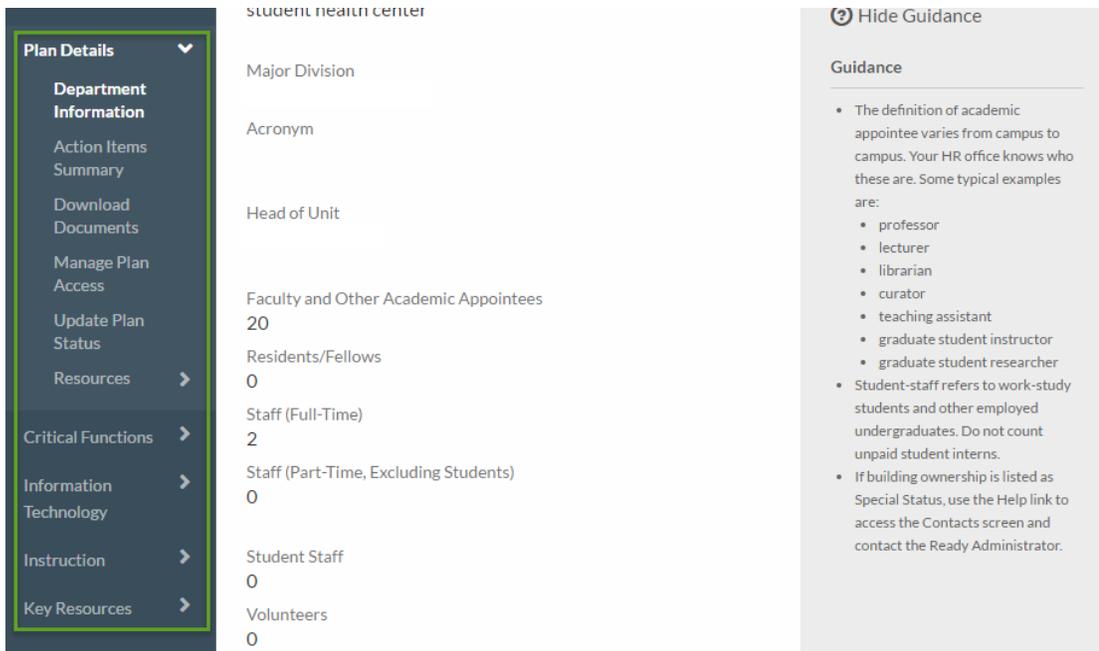
The Plans Link loads the Plans screen, which contains a list of all the plans. This list gives a quick view of plan status, as well as options for viewing, editing, and deleting plans. This is also the screen where you can Start a New Plan.

Help Link

The Help link loads the main Help screen that includes a navigation menu with links to Help resources.

3. Panel Navigation

Many screens provide navigation menus in the left panel below the Global Navigation. When you select a link that leads to a sub-menu, that menu will then appear in the left panel. Arrows next to navigation section headers indicate you can click to expand and collapse those sections. The Panel Navigation highlights your current location at all times.



4. Action Menu

When working within a plan, the Action Menu exists on the right hand side. It contains different content depending on your location within a plan. Normally you will find the save function, the edit/view mode links, the ability to print and the link to guidance is available.

The screenshot displays the user interface for the 'BCP101 - CTPD (Training)' plan. The page title is 'BCP101 - CTPD (Training)' and the status is 'In Progress'. The left sidebar contains navigation options: Plans, Help, Admin, Reports, Plan Details (expanded), Department Information (selected), Action Items Summary, Download Documents, Manage Plan Access, Update Plan Status, Resources, Critical Functions, Information Technology, and Instruction. The main content area is titled 'Department Information' and lists various fields: Department Name (BCP101 - CTPD (Training)), Department Description, Major Division, Acronym, Head of Unit, Faculty and Other Academic Appointees (20), Residents/Fellows (0), Staff (Full-Time) (2), Staff (Part-Time, Excluding Students) (0), and Student Staff (0). On the right side, the 'Action Menu' is visible, containing 'Edit Page', 'Print PDF', and 'Hide Guidance' options. Below these is a 'Guidance' section with a list of bullet points explaining the definition of academic appointees and student-staff.

BCP101 - CTPD (Training)		Status: In Progress
Department Information		
Department Name	BCP101 - CTPD (Training)	Edit Page Print PDF Hide Guidance Guidance <ul style="list-style-type: none">The definition of academic appointee varies from campus to campus. Your HR office knows who these are. Some typical examples are:<ul style="list-style-type: none">professorlecturerlibrariancuratorteaching assistantgraduate student instructorgraduate student researcherStudent-staff refers to work-study students and other employed undergraduates. Do not count unpaid student interns.If building ownership is listed as Special Status, use the Help link to access the Contacts screen and contact the Ready Administrator.
Department Description		
Major Division		
Acronym		
Head of Unit		
Faculty and Other Academic Appointees	20	
Residents/Fellows	0	
Staff (Full-Time)	2	
Staff (Part-Time, Excluding Students)	0	
Student Staff	0	

General Features & Functions

Icons

Simple icons link to functions throughout the system. You can hover the mouse pointer over the icon to view the icon label.

-  edit Edit - Select the pencil icon to edit content.
-  view View - Select the eye icon to view content
-  delete Delete - Select the trash can icon to delete content.
-  Archive - Select the file drawer icon to archive Action Items.
-  Move - Hover over the icon and the mouse pointer turns into a cross. Select and hold the icon to drag and drop list items to rearrange the order.
-  Locked - This item is in use by other sections of your plan. You cannot delete this item until its associated content has been removed or deleted.

Edit and View Modes

Each page within a plan can be accessed in either an edit or view mode. Edit Mode allows you to see all the fields that can be edited, make changes and save changes.

Edit mode had an orange banner across the top. To switch to view mode click on the View Page link in the right hand side bar.

BCP101 - CTPD (Training) | Editing
Status: In Progress

Critical Functions

+ Add Critical Function

Function	Level of Criticality		
 Instruction	Critical 1: must continue (life, health, security)	 edit	 delete
 Training	Critical 1: must continue (life, health, security)	 edit	 delete
 health	Critical 1: must continue (life, health, security)	 edit	 delete

 View Page

 Print PDF

 Hide Guidance

Guidance

Functions

We are asking here for the functions you normally perform. (Instruction is covered in another section.) Here are some typical examples:

The view mode allows you to see a clean display of all content available without the chance of erroneously editing or saving content. View mode has a blue banner across the top.

Function	Level of Criticality
Instruction	Critical 1: must continue (life, health, security)
Training	Critical 1: must continue (life, health, security)
health	Critical 1: must continue (life, health, security)

Edit Page

Print PDF

Hide Guidance

Guidance

Save

Several screens have open fields that allow you to edit content without explicitly selecting and Edit button. When you edit content on these screens, make sure you select the Save button before you leave the screen.

Instruction: Description

* Critical Function Name: Instruction

* Level of Criticality: Critical 1: must contin

Brief Description of This Function

Name of Section or Unit That Performs This Function (if applicable)

Responsible People (give names unless this is a generic group)

Save

View Page

Print PDF

Hide Guidance

Guidance

Remember to use the Save button after entering or editing information on this page.

When there is no content that needs to be saved you will see the Saved button surrounded by green. When you have made changes that need to be saved, you will see the Save button surrounded by white. Click on the Save button to save all changes.



Clicking on the save button will also provide you with a notification in the upper portion of your screen to let you know you have successfully saved your changes. If you attempt to navigate away from the screen with unsaved changes you will be prompted to save them.



Alerts

Within the system, user alerts will appear at the top of the application partially covering the Banner. These alerts have three forms: Successes in green, Information in blue and Errors in red. They will automatically dismiss if no action is taken after 3 seconds. You can also manually close them by clicking on the X in the right hand side.



Guidance Panels

Within the Action Menu you will find the Guidance content. This text contains helpful instructions and suggestions to guide users through the system and prompt them for quality responses. You can reveal the guidance panel by clicking the Guidance link and you can hide the guidance panel by clicking on the Hide Guidance link. Your current selection will persist as you navigate between screens.



Drag and Drop Ordering

Some of the list content can be rearranged to change the order of the list items. This content is indicated by a hamburger icon (3 parallel horizontal lines). Hover over the icon and the mouse pointer turns into a cross. Select and hold the icon to drag and drop a list item to the appropriate place.

Function	Level of Criticality		
☰ IT	Thing 1	 edit	 delete
☰ Purchasing	Thing 1	 edit	 delete
☰ Human Resources	Thing 1		

Upload

There are a few places where you can upload content. First select the choose file button to locate the file on your system. Then select the Upload File button.

Within plans you can upload documents that need to be stored with plans. The Documents section in Plans allows you to also drag and drop files to upload them. You can attach any type of files to plans, but users must have the appropriate application on their system in order to open files. Keep accessibility in mind as you add documents.

Comment (if needed)

Attachment

Drag and drop a file or click to attach a file



2014 Higher
Educatio...ent.pdf

✖ Cancel

✔ Save

+ Save and New

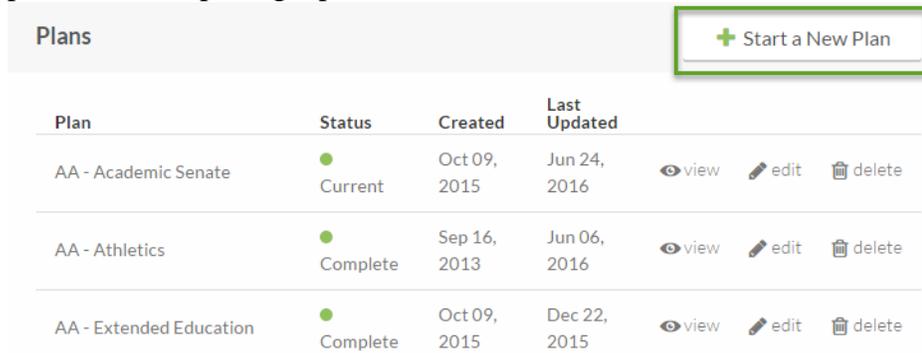
Browser Functions

You can use your browser's back and forward buttons to navigate between screens. You will be prompted to save when you attempt to navigate away from a screen you have made changes on. You can also use your browser's print function to save screens to PDF or print.

How to...

Start a New Plan

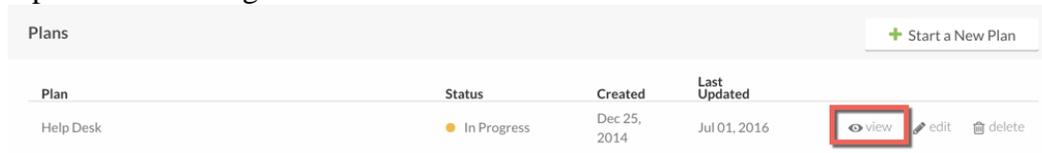
Users can create plans using the Start a New Plan button on the Plans screen. When you start a new plan you are automatically taken to the Department Information screen to continue the process of completing a plan.



Plan	Status	Created	Last Updated			
AA - Academic Senate	● Current	Oct 09, 2015	Jun 24, 2016	👁 view	✎ edit	🗑 delete
AA - Athletics	● Complete	Sep 16, 2013	Jun 06, 2016	👁 view	✎ edit	🗑 delete
AA - Extended Education	● Complete	Oct 09, 2015	Dec 22, 2015	👁 view	✎ edit	🗑 delete

View Plans

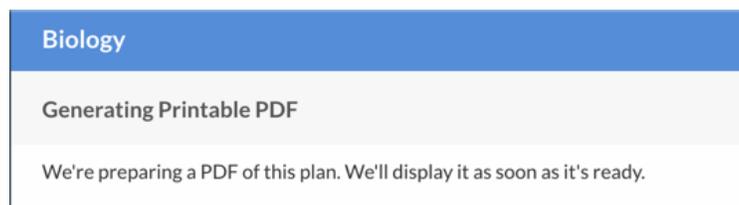
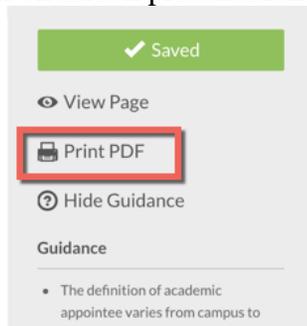
From the Plans screen, you can select the eye icon to view any plan for which you're authorized. If you are in Plan Edit Mode, you can select the View or Print Plan link near the top of the left navigation.



Plan	Status	Created	Last Updated			
Help Desk	● In Progress	Dec 25, 2014	Jul 01, 2016	👁 view	✎ edit	🗑 delete

Print Plans

From within a plan (in edit or view mode) select the Print PDF icon from the Action Menu to view an on screen presentation of the plan that you can print using your browser functions.



The Print PDF link will generate a nicely-formatted PDF in a new browser tab. You can then download or print the PDF.

Tip: You can also select the plan content on the screen, copy it, and paste it into an external document. You might choose to do this if you want to add comments.

Edit Plans

There are two paths to Edit Plans.

- From the Plans screen, you can select the pencil icon link to any plan for which you're authorized.
- If you're within a plan you have access to, you can select the Edit Page link from within the Action Menu.

Upload Documents

There are a few places where you can upload content. First select the choose file button to locate the file on your system. Then select the Upload File button.

Download Documents

If documents have been added as attachments to the plan, you can select the Download Documents link in Plan Details to view a list with links to download each document.

Manage Plan Access

When you create a plan, you're automatically assigned the Plan Manager role. Plan Managers can use the Manage Plan Access link in the plan navigation to add other users, including additional Plan Managers, to plans. There are three user roles for plans.

- Plan Manager: can view and edit plans and Manage Plan Access
- Plan Editor: can view and edit plans
- Plan Viewers: can view plans, but cannot edit them

The screenshot displays the user interface for a plan titled "BCP101 - CTPD (Training)" with a status of "In Progress". The left sidebar contains a navigation menu with options: Plans, Help, Admin, Reports, Plan Details (expanded), Department Information (highlighted), Action Items Summary, Download Documents, Manage Plan Access (highlighted with a green box), Update Plan Status, and a plus sign. The main content area is divided into two columns. The left column, under "Department Information", lists: Department Name (BCP101 - CTPD (Training)), Department Description (student health center), Major Division (Business and Finance), Acronym, Head of Unit, and Faculty and Other Academic Appointees (20). The right column contains action links: Edit Page, Print PDF, and Hide Guidance. Below these is a "Guidance" section with a bullet point: "The definition of academic appointee varies from campus to campus. Your HR office knows who these are. Some typical examples are:" followed by a list: professor, lecturer, librarian, curator, teaching assistant, and graduate student instructor.

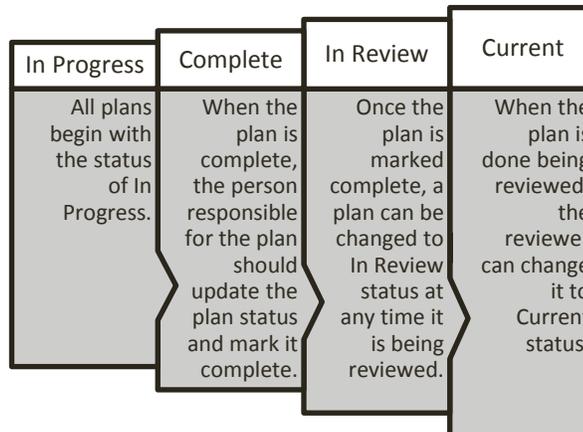
Add New User

Access to your department's continuity plan is controlled by adding users and assigning roles on this screen.

First name	Last name	Email	Role	Actions
Malinda				<input type="checkbox"/> Send an email invitation to this user
Sherry				
Galdina	Serrano	gserrano@csustan.edu	(209) 667-3387	Plan editor
Tula	Mattingly	tmattingly@csustan.edu	(209) 667-3362	Plan editor
Pauline	Clanton	pclanton@csustan.edu	(209) 667-3396	Plan editor

Update Plan Status

When completing your annual review, you will be provided with an Annual Review Checklist. Once you have gone through your plans and made updates you will then update your plan status to Current.



The most recent Plan Status is listed at the top of the Plan Navigation. The Update Plan Status is listed at the top of the Plan Navigation. The Update Plan Status screen keeps a record of each update. The Comment field allows the user to make a note of their review. Update can be deleted up to seven days after they were entered. After that the record becomes permanent.

Update Plan Status

* Name: Test User | Role: Admin

* Date: 2016-07-01 | * Status: Complete (selected)

Comment: [Text area]

Buttons: Cancel, Save, Save and New

Add a New Action Item

Action Items are the most important part of Continuity Planning. The process of thinking through the steps you need to take to prepare, is critical to developing a culture of preparedness.

New Action Item

*** Action Item**

Critical Function

Not part of a Critical F ▼

Cost

Please select... ▼

Cost Frequency

Please select... ▼

Assigned To

Due Date

Within Whose Scope

Please select... ▼

Status

Please select... ▼

Details

✖ Cancel

✔ Save

+ Save and New

Resources

Links to the sample plans, interview forms, and glossary are located in the Plan Navigation banner under Plan Details. The sample plans are in PDF format and are examples of well-constructed plans. You may use this document for ideas about the kind of information you can include in your plan. The interview forms are designed to support the information gathering process. The form includes most of the questions presented in StanReady for the Department Information, Critical Functions, Instruction/ Faculty Preparedness and Key Resources sections of plans. The glossary is available to users to refer to it when you need assistance understanding terms in StanReady.

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