



## **Plan Teams (also includes Plan Team Tasks)**

## Revision History

<b>Date</b>	<b>Revision</b>	<b>Change by</b>	<b>Revision #</b>
08/02/17	Document Creation	Lori Gorman	V1
09/12/17	Removed references to cloning teams	Claudette Martin-Wus	V2
3/19/18	Further definition of process	Heather Volkomer	V3
4/11/22	Update BCIC access instructions	Lori Gorman	V4

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## Summary

Process builders and Plan builders assign employees to their plan directly into teams. All employees should be assigned to a team (whether a process level team or a plan level team). Some employees may be assigned to multiple teams. Process level teams are assigned directly to a process and their information displays in the *Section 3.0: Process Dependencies* of the published plan. Plan level teams are built at a plan level and are **NOT** assigned to specific processes. Their information displays in *Section 4: Plan Teams and Tasks* in the published Plan. Organizations that choose to build at a Plan level are not able to view Process Teams. Organizations that choose to build at a Process level may view both process and Plan level teams. *Section 2.3.1: Telecommuting* displays those employees assigned to plan level teams and their relative VPN access (as defined in the employee records).

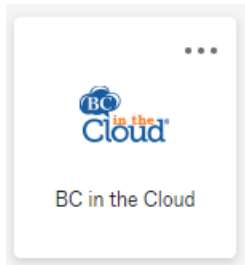
The chart below compares Plan vs. Process level teams.

Capability	Plan Level Teams	Process Level Teams
Team linked directly to a process	No	Yes
Team information displays in <i>Section 3.0: Process Dependencies</i> in the published plan	No	Yes
Team information displays in <i>Section 4.0: Plan Teams and Tasks</i>	Yes	No
Employees assigned to plan teams displays in <i>Section 2.3.1: Telecommuting</i> showing employee VPN access	Yes	Yes
Tasks assigned directly to the team	Yes	No- process teams refer to those tasks assigned directly to the Process
Users able to view/assign plan level teams	Yes	Yes
Users able to view/assign process level teams	No	Yes
Teams shared across the tool.	No- plan teams are only created within a plan and are not linked to any other tables with the plan. However, updating plan teams does update <i>Section 2.3.1: Telecommuting</i> in the published plan as this report is populated based on the plan teams.	Yes- Process teams may be assigned to multiple processes. When a process team is updated, the update is reflected everywhere that process team is referenced.

## Accessing Plan - Teams Tab

### Step 1. Log into the tool.

This application has been added to Delaware's SSO platform. Log into <https://ID.Delaware.gov> using your normal network credentials. Select the BCIC tile pictured below.



### Step 2. Locate the Plan to be updated.

The screenshot shows the BC in the Cloud application interface. The browser address bar displays the URL: <https://app.bcinthecloud.com/prod2/m/main.jsp?pagelId=43139880&applId=43145866&tabId=43145500>. The navigation menu on the left includes: BIA, Plans, Processes, Employees, Process Teams, and To-Dos. A red arrow points from the 'Plans' menu item to a callout box that says "Go to the plan tab or select Manage Plans." Below the navigation menu, there are three main sections: "Manage Processes" (with a blue folder icon), "Manage Plans" (with a red briefcase icon and a green checkmark), and "Manage Exercises/Tests" (with a blue document icon and a red X). The main content area is titled "My Planning Items" and contains two sections: "My Processes" and "My To-Dos". The "My Processes" section has a table with columns: Process Status, Process, Process Creator, Requested RTO, Updated At, and Updated By. The "My To-Dos" section has a table with columns: Status Summary, To-Do Summary, Workflow Actions, and Task Link. Both tables currently show "No records to display."

### Step 3. Select the Plan you wish to update.

Select the plan you wish to update by clicking on the plan name.

Plans

Keywords:

Search for Plans that match ALL criteria

Business Entity is one of

DDS equals

Plan Name contains

Search Clear

Status	Plan Name	Next Update Date	Continuity Coordinator(s)	Updated At	Updated By	count attach
Created	Industrial Affairs Department Plan	09-00-00	Office-Chief Security Officer	06/16/2017, 10:47 AM	LAGprocessbuilder Trainer	13
Created	Office of Human Relations Plan	00-00-00		05/25/2017, 11:15 AM	SoD Prod 1 Admin 1	0
Created	OMB Office of Management and Budget	00-00-00		05/25/2017, 11:16 AM	SoD Prod 1 Admin 1	0
Created	ZZZ Continuity of Operations Test Plan	11-02-01	/DTI-Security Office-Chief Security Officer	06/29/2017, 9:34 AM	SoD Prod 1 Admin 1	9
Expired	ZZZ MG COOP Plan	11-02-01	/DTI-Security Office-Chief Security Officer	06/25/2017, 8:58 AM	Server Side User	0
Created	ZZZ SOD Test Plan	11-02-01	/DTI-Security Office-Chief Security Officer	06/20/2017, 8:21 AM	SoD Prod 3 Admin 3	2

### Step 4. Go to the Team Tab.

Plan: ZZZ Continuity of Operations Test Plan

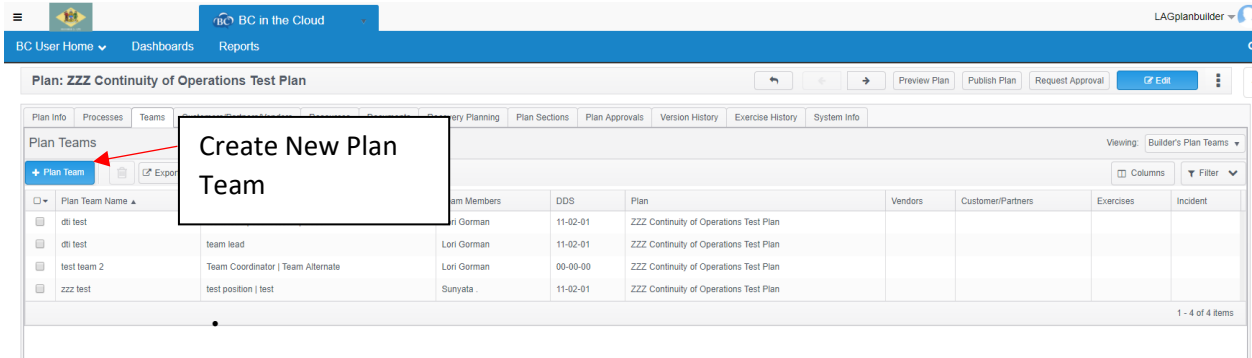
Plan Info Processes Teams Customers/Partners/Vendors Plan Sections Plan Approvals Version History Exercise History System Info

Plan Teams

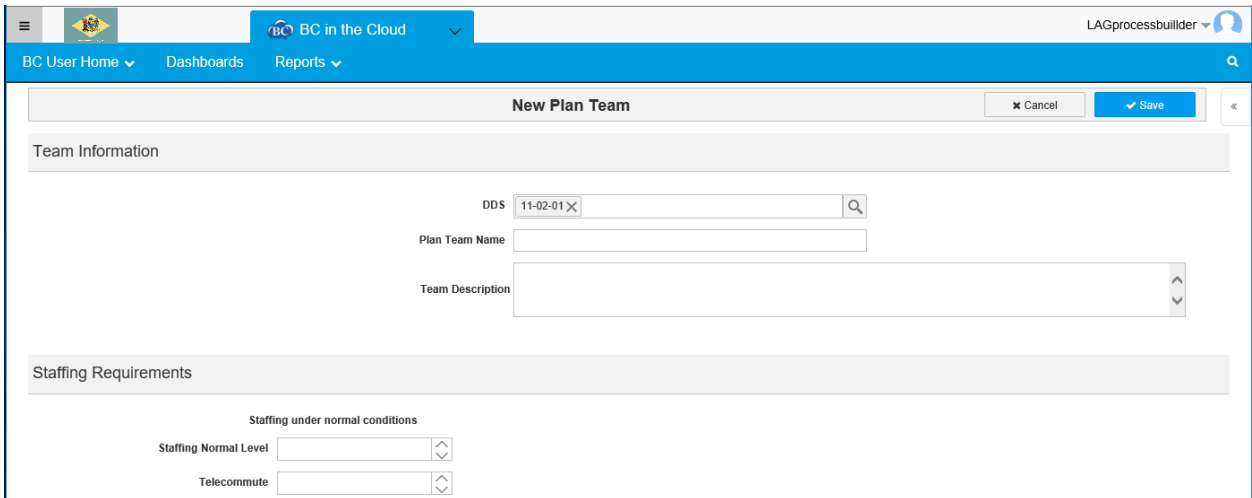
Plan Team Name	Plan Team Positions	Team Members	DDS	Plan	Vendors	Customer/Partners	Exercises	Incident
dti test	team lead   Team tester   Liason	Lori Gorman	11-02-01	ZZZ Continuity of Operations Test Plan				
dti test	team lead	Lori Gorman	11-02-01	ZZZ Continuity of Operations Test Plan				
test team 2	Team Coordinator   Team Alternate	Lori Gorman	00-00-00	ZZZ Continuity of Operations Test Plan				
zzz test	test position   test	Sunyala	11-02-01	ZZZ Continuity of Operations Test Plan				

# Creating a New Plan Team

Step 1. Click on the  Team button.



Step 2. Assign the correct DDS, Team name, Team Description and staffing Requirements fields and click Save.



Step 3. Edit the Team to create Team positions and link employees.

See Editing a Team.

## Editing a Plan Team

**Step 1. View team details by clicking on the Plan Team Name. Here you can view the team information, staffing requirements, team positions, assigned employees, and the team tasks.**

Plan Team: zzz test Edit

Team Info | Related Personnel | Relationships | System Info

[Back to Plan](#)

### Team Information

DDS [11-02-01](#)  
Plan Team Name [zzz test](#)  
Team Description  
Task Duration 0 days, 0 hours, 40 minutes, 0 seconds

### Staffing Requirements

Staffing under normal conditions  
Staffing Normal Level  
Telecommute

### Team Positions

Viewing: All Team Positions

[+ Plan Team Position](#) Export Columns Filter

<input type="checkbox"/>	Actions	Plan Team Position	Employees	Updated At
<input type="checkbox"/>		<a href="#">test position</a>	<a href="#">Sunyata .</a>	06/16/2017, 11:41 AM
<input type="checkbox"/>		<a href="#">test</a>	<a href="#">Autumn .</a>	06/16/2017, 11:42 AM

1 - 2 of 2 items

### Team Tasks


Viewing: All Tasks

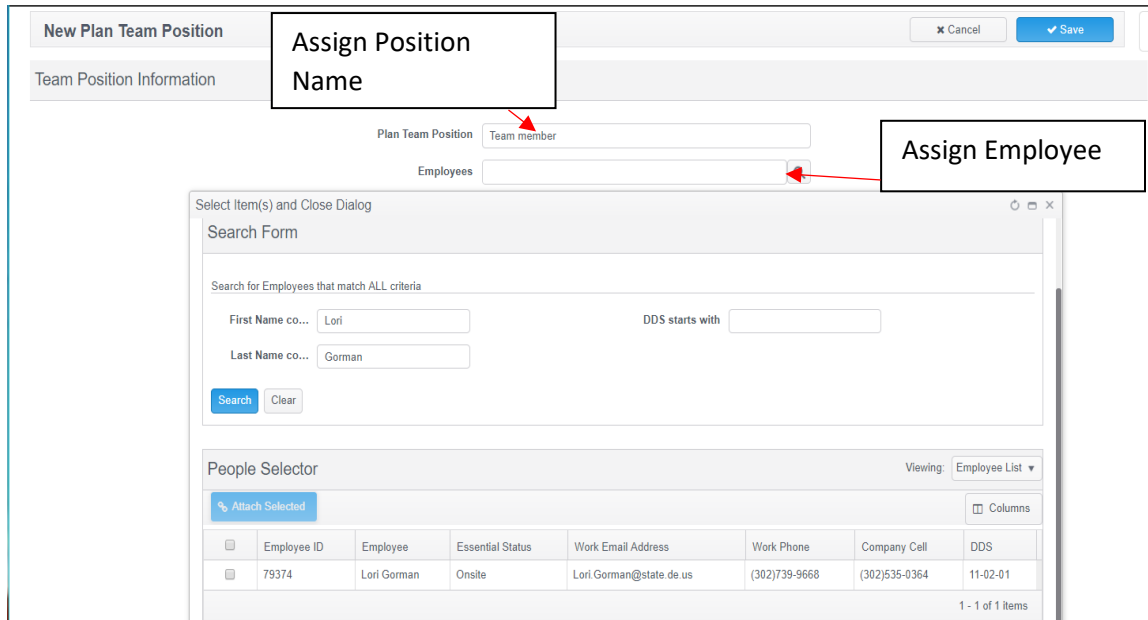
**Step 2. Click edit to change Team Information or Staffing Requirements sections.**



## Add/Delete Plan Team Positions and Employee Assignments


**Step 1. From the View Screen: Click on the  button.**

- Enter the Plan Team Position name.
- Link employees by typing in the employee name or using the  icon.

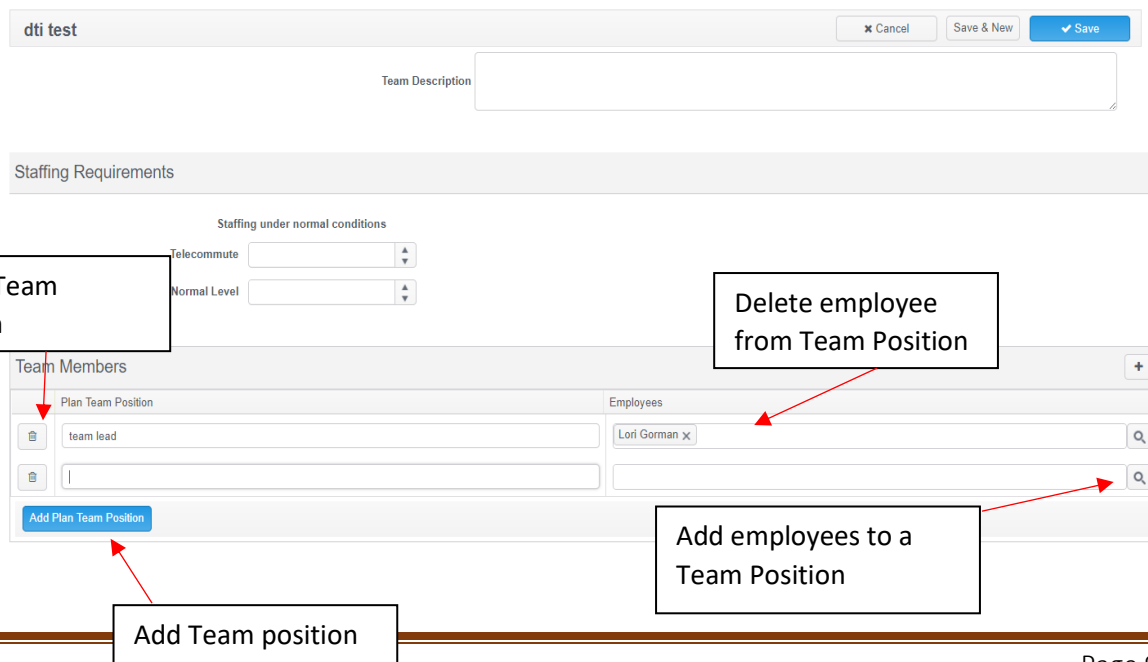


The screenshot shows the 'New Plan Team Position' form. A box labeled 'Assign Position Name' points to the 'Plan Team Position' field, which contains 'Team member'. Another box labeled 'Assign Employee' points to the 'Employees' field. Below the form is a 'Select Item(s) and Close Dialog' window with a search form and a table of employees.

Employee ID	Employee	Essential Status	Work Email Address	Work Phone	Company Cell	DDS
79374	Lori Gorman	Onsite	Lori.Gorman@state.de.us	(302)739-9668	(302)535-0364	11-02-01

When assigning an employee to the team position, you may use the “type ahead” option and begin typing an employee name. If multiple employees with the same name exist, you will need to use the  to determine the correct employee to link. The Search option will show employee ID, contact information and DDS for the employees.

**OR: From the Edit Screen**



The screenshot shows the 'Edit Screen' for a team position. Annotations include: 'Delete Team position' pointing to a trash icon; 'Delete employee from Team Position' pointing to a trash icon next to 'Lori Gorman'; 'Add employees to a Team Position' pointing to a magnifying glass icon; and 'Add Team position' pointing to an 'Add Plan Team Position' button.

## [Adding Related Personnel to a Team](#)

There are some cases in which a Plan Team may include individuals from outside the organization. For example, a Damage Assessment Team may include representatives from Facilities Management (Customer/Partner- state entity), property owners/landlord (Customer/Partner- non state entity), or Verizon (Vendor).

### Step 1. Select the Related Personnel Tab.

Plan Team: dti test

Team Info | **Related Personnel** | Relationships | System Info

Use the view switcher to see Customer/Partner resources that are State Entities or Non-State Entities.

Click + Team Customer/Partner to link a Customer/Partner to your Team. Viewing: Customer is not State Entity


+ Plan Team Customer Org

Actions	Plan Team Customer Org	Customer Reps	Updated At	Updated By
No records to display.				

Click + Team Vendor to link a Vendor to your Team. Viewing: All Team Vendors

+ Plan Team Vendor

Actions	Plan Team Vendor	Vendor Reps	Updated At	Updated By
No records to display.				

Step 2. Click on the  button to link a Customer/Partner to your Team.

Step 3. Determine if the Customer/Partner is a State entity.

### Non-State Entity

- If your Customer/Partner is not a State entity, select the appropriate information from the Customer/Partner Details fields using the search icons.

New Plan Team Customer Org Cancel Save

Team Customer/Partner Company Information

Plan Team dti test

Identify if this Customer/Partner is a State Entity.  
If yes, check the box and enter in the appropriate Entity and State Employee.  
If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reps.

Is State Entity

Customer/Partner Details


Customer/Partner Company

Customer Reps

- Click on the  icon beside Customer/Partner Company field.

- Using the Search Form, enter the Customer/Partner Company Name Contains field, and select Search.

Select Item(s) and Close Dialog



### Search Form

Search for Customer/Partner Company that match ALL criteria

Customer/Partner Company Na...

### Customer/Partner Records Selector

Viewing: All Customer/Partner Records

Status Summary	Customer/Partner Company Name	Address 1	Address 2	Phone	Customer Reps	DDS
<span style="background-color: green; color: white; padding: 2px;">Active</span>	Artesian Water				James Straight   Adam Gould   James Straight	00-00-00

1 - 1 of 1 items

- Link the Customer/Partner by clicking on the Company name.

New Plan Team Customer Org

### Team Customer/Partner Company Information

Plan Team dti test


Identify if this Customer/Partner is a State Entity.  
 If yes, check the box and enter in the appropriate Entity and State Employee.  
 If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reps.

Is State Entity

### Customer/Partner Details

Customer/Partner Company

Customer Reps



- Click on the  icon beside the Customer Reps field.

- Use the Search form to narrow the Customer Rep Search to those reps related to the Customer/Partner Company name. **This does not auto-populate based on the prior selection.**

The screenshot shows a window titled "Select Item(s) and Close Dialog". Inside, there is a "Search Form" with a "Keywords:" field, a search instruction "Search for Customer Reps that match ALL criteria", and two filter fields: "Customer/Partner equals" (with "Artesian Water" selected) and "Customer Rep contains". There are "Search" and "Clear" buttons. Below the search form is a "Customer Reps Selector List" with a "Viewing:" dropdown set to "All Customer Reps". It includes an "Attach Selected" button and a "Columns" button. The list is a table with columns: Customer Rep, Title, Work Number, Work Fax, Email Address, DDS, and Customer Rep ID. The table is filtered by "Customer/Partner: Artesian Water" and shows three rows of data.

	Customer Rep	Title	Work Number	Work Fax	Email Address	DDS	Customer Rep ID
+	James Straight	Manager				00-00-00	CRP00194
+	James Straight	Manager	(302)453-6918			00-00-00	CRP00186
+	Adam Gould		453-6908			00-00-00	CRP00187

1 - 3 of 3 items

- If the desired Customer Rep is not available, close out of the search box and click on the  icon.
- Complete all required fields and click the  button.

The screenshot shows a "New Customer Rep" form. It has a "Quick Create" header. The "Customer Rep ID" is pre-filled with "CRP00512". There are input fields for "First Name", "Last Name", "Work Number" (with a format hint "(###)###-####"), "Ext.", "Cell Number" (with a format hint "(###)###-####"), and "Work Fax". At the bottom right, there are "Save" and "Cancel" buttons.

## State Entity

- If the Customer/Partner is a State Entity, click on the “Is State Entity” check box. This will change the search fields below.

New Plan Team Customer Org ✕ Cancel ✓ Save


Team Customer/Partner Company Information


Plan Team dli test

Identify if this Customer/Partner is a State Entity.  
If yes, check the box and enter in the appropriate Entity and State Employee.  
If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reps.

Is State Entity

State Entity

Business Entity  

State Employee  

- Select the desired State Entity and State Employees by using the Search icons beside the fields.  
**\* Note: If you are unable to locate the correct State Entity, uncheck the State Entity box and search the Customer/Partners records.\***

+ Plan Team Vendor

Step 4. Click on the button.

New Plan Team Vendor Cancel Save

Team Vendor Information

Team dti test

Vendor


Notes

Website

Vendor Reps

- Click on the  icon by Vendor field.

Select Item(s) and Close Dialog Refresh Close



Search Form

Search for Vendors that match ALL criteria

Vendor Name contains

Vendor Reps is one of

Search Clear

Vendors Selector Viewing: All Vendors Columns

Vendor Name ▲	Address 1	Main Phone	Vendor Reps	Vendor Number
1 - TOUCH SOLUTIONS LLC	17 MARIE LN			0000199170001
1 800 PACK RAT	3331 HERITAGE TRADE DR STE 110	(877)751-9378	Test First Name Test Last Name	000008566900001
1 A LIFESAFER OF DELAWARE INC	4290 GLENDALE MILFORD ROAD			000020019100001
1 BROOKSIDE DRIVE LLC	111 ST JOHN DRIVE			000025663100001
1 SMARTECH LED INC	109 DIMINISH DR	(215)833-9339		000022263700001

- Utilize the Search Form fields to locate the desired Vendor.

- Select the desired Vendor by clicking on the Vendor Name.
- Add any Notes or Website information specific to the Vendor for this team (this is plan specific data and does not show in other plans).

New Plan Team Vendor ✕ Cancel ✓ Save

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Team Vendor Information

Team dti test

Vendor 1 SMARTECH LED INC ✕ 🔍


Notes This vendor provides XYZ services to the DTI test team in the event of....

Website www.smartech.com

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Vendor Reps

Vendor Reps   🔍 +

- Add a select Vendor Rep by clicking on the  icon beside Vendor Reps field.
- Use the Search Form to narrow the search to vendor reps specific to the previously selected Vendor.

Select Item(s) and Close Dialog 🔄 □ ✕

---

Search Form

Search criteria

contains  

Vendor is one of VERIZON ✕ 🔍

Search Clear

---

Vendor Reps Selector Viewing: All Vendor Reps ▾

🔍 Attach Selected 🔍 Columns

<input type="checkbox"/>	Vendor Rep	Position	Work Number	Email Address	DDS
<input type="checkbox"/>	Lucy Goosy	VERIZON help	(444)444-4444		11-02-01
<input type="checkbox"/>	Test Claudette Test Martin-Wus	VERIZON			11-02-01
<input type="checkbox"/>	zzzJason Lee	VERIZON			11-02-01

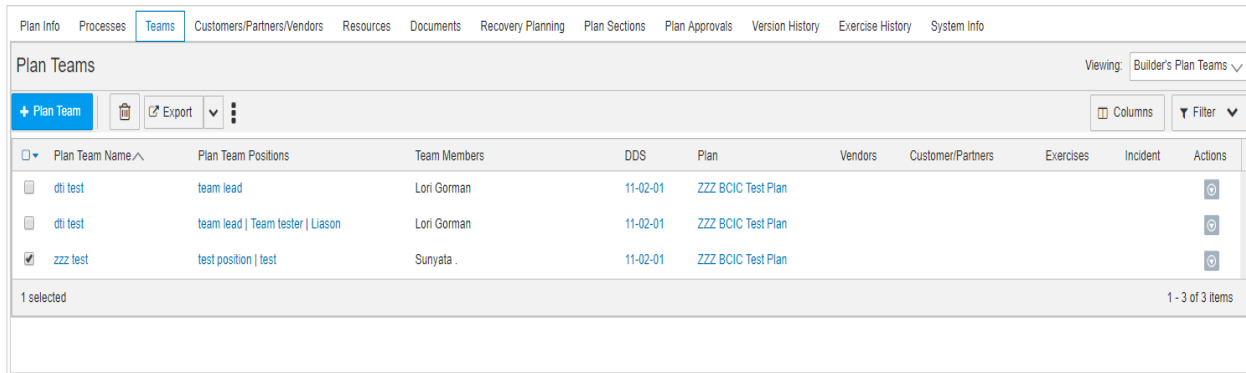
1 - 3 of 3 items

- Link Vendor Reps by placing a check mark in the boxes beside the desired names and clicking on the Attach Selected box.

## Deleting a Plan Team

Plan teams are unique to each plan so deleting a plan team will remove it completely from the dictionary. You are only able to edit/delete plan teams that have been assigned your security DDS.

**Step 1. From the Plan Teams Tab, check the box next to the team you wish to delete.**



<input type="checkbox"/>	Plan Team Name ^	Plan Team Positions	Team Members	DDS	Plan	Vendors	Customer/Partners	Exercises	Incident	Actions
<input type="checkbox"/>	dti test	team lead	Lori Gorman	11-02-01	ZZZ BCIC Test Plan					
<input type="checkbox"/>	dti test	team lead   Team tester   Liason	Lori Gorman	11-02-01	ZZZ BCIC Test Plan					
<input checked="" type="checkbox"/>	zzz test	test position   test	Sunyata .	11-02-01	ZZZ BCIC Test Plan					

1 selected 1 - 3 of 3 items

**Step 2. Click on the Trash Can  icon found on the actions menu bar.**



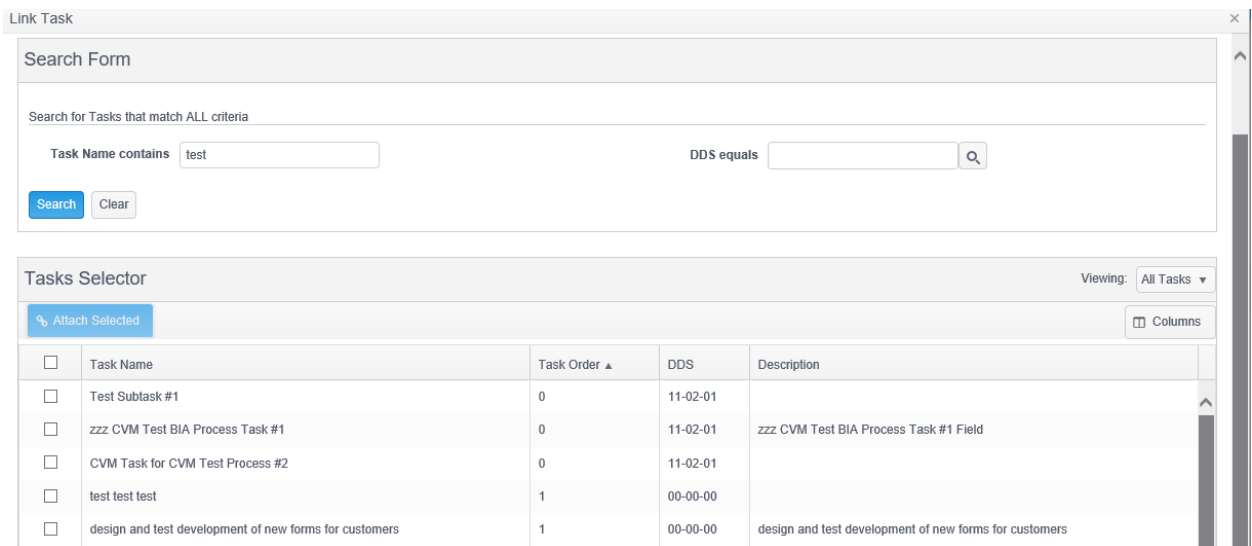
## Plan Team Tasks

Plan teams may be assigned tasks that display in checklist format in *Section 4.0 Plan Teams and Tasks* of the published plan. These tasks are assigned to the team (rather than a specific team position).

### [Linking a Plan Team Task](#)

**Step 1. From the Plan Team View screen of the desired team, select the  button.**

**Step 2. Using the Search Form, locate your desired task by completing the Task Name contains field, or the DDS Equals field and clicking on the Search button. \*Completing multiple fields requires all criteria to be valid in the search results and may limit your options\***



The screenshot shows a 'Link Task' window with a search form and a task selector table. The search form has two input fields: 'Task Name contains' with the value 'test' and 'DDS equals' which is empty. There are 'Search' and 'Clear' buttons. Below the search form is a 'Tasks Selector' section with an 'Attach Selected' button and a 'Columns' button. The table below has columns for 'Task Name', 'Task Order', 'DDS', and 'Description'.

<input type="checkbox"/>	Task Name	Task Order ▲	DDS	Description
<input type="checkbox"/>	Test Subtask #1	0	11-02-01	
<input type="checkbox"/>	zzz CVM Test BIA Process Task #1	0	11-02-01	zzz CVM Test BIA Process Task #1 Field
<input type="checkbox"/>	CVM Task for CVM Test Process #2	0	11-02-01	
<input type="checkbox"/>	test test test	1	00-00-00	
<input type="checkbox"/>	design and test development of new forms for customers	1	00-00-00	design and test development of new forms for customers

Once the desired task is located place a check next to the task name and click on the

 button.

## Editing a Plan Team Task

**Step 1. Select the Task Name you wish to edit. This will take you to the task details view screen.**

Task: Meet at alternate location (test task)

Task Info System Info

Task Information

DDS 11-02-01

Task Order 2

Task Name Meet at alternate location (test task)

Description designated employees are to meet at the Alternate location to begin site set up for COOP restoration.

Duration

Duration Time 5

Time Units Hour(s)

Utilization

Times Used in Exercises 0

Average Duration in Exercises NaN days, NaN hours, NaN minutes, NaN seconds

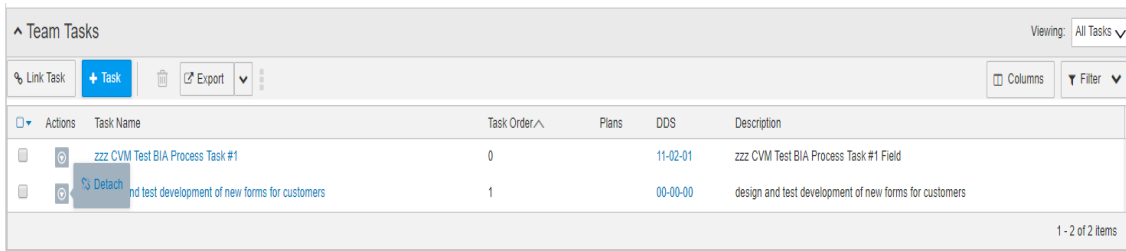
**\*You are only able to Edit tasks with your matching security DDS.\***

**Step 2. Click on the  button.**

You may edit the task name, task description, task order, and Duration Time/ Time Units.

## Removing a Plan Team Task

**Step 1. Select the Actions drop-down and select .**



The screenshot shows a web interface for managing team tasks. At the top, there is a header "Team Tasks" with a "Viewing: All Tasks" dropdown. Below the header is a toolbar with "Link Task", "+ Task", "Export", and "Columns" buttons. The main area is a table with the following columns: Actions, Task Name, Task Order, Plans, DDS, and Description. Two tasks are listed. The second task has a "Detach" button highlighted in a grey box.

Actions	Task Name	Task Order	Plans	DDS	Description
	zzz CVM Test BIA Process Task #1	0		11-02-01	zzz CVM Test BIA Process Task #1 Field
	nd test development of new forms for customers	1		00-00-00	design and test development of new forms for customers

1 - 2 of 2 Items