

Continuity Planning User Guide

This is a user’s guide for the *Continuity Planning* system. Guidelines and instructions on how to perform simple functions are provided in this document. Categories and options seen when using the system will be explained and, when necessary, followed with detailed information. If you have any questions that are not addressed below, please email Courtney Shaw.

The following information will be provided in this guide:

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Accessing Continuity Planning

- To access *Continuity Planning*, click on the following link: <https://utdallas.kuali.co/>
- Enter your UTD email and password
- Select “Sign In.”
 - Note: If you cannot access the system, please contact Courtney Shaw, your Plan Administrator.

Selecting your Plan

After logging in, you will see a list of all the continuity plans for UT Dallas. When you find your plan on the list, you will be able to see its status, date it was created, and date it was last updated. To the right of this information, you will see three options: view, edit, and delete.

- **View:** Selecting this option will take you to your plan. You will be in view mode, which means you can look at the different sections of your plan, but cannot edit.
 - Note: It is possible to initially be in view mode and then switch to edit mode once you are in your plan.
- **Edit:** Selecting this option will take you to your plan as well. You will be in edit mode, which means you can look at the different sections of your plan and edit information.
 - Note: It is possible to initially be in edit mode and then switch to view mode once you are in your plan.
- **Delete:** This option will delete your plan from the list of plans.

Creating a New Plan

- To create a new plan, select “Plans” from the left sidebar (it will be the first button at the top of the sidebar).
- On the far top right of the screen, select the “+ Start New Plan” button.
- After selecting this button, you will be guided through the development of your new plan.

Saving Data

Several screens have open fields that allow you to edit content without having to select the “Edit” button. When you edit content on such screens, make sure that you select the “Save” button that is at the top of the right sidebar before you leave the screen.

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.

Understanding Icons and Alerts

While you are in the system, you will see simple icons and alerts. This section will give you a brief understanding of what each icon and alert means.

Icons

Simple icons link to functions throughout the system. You can hover your mouse pointed over any icon to view the icon label and learn what it does. Below are the icons that you will see in this system and their meanings.

Icon	Meaning
 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.

Alerts

Within the system, user alerts appear at the top of the screen. These alerts have three forms that they will appear in:

- Green alerts are **Successes**
 - This means that the action you attempted was successful.
- Blue alerts are **Information**
 - This means there is important information concerning the screen you are on.
- Red alerts are **Errors**
 - This means that the action you attempted was unsuccessful. If applicable, make the necessary changes/alterations and attempt the action again. Contact Courtney Shaw if you continue seeing this error and are not sure why.

Navigating *Continuity Planning*

The Basics

The main tabs or sections in *Continuity Planning* are displayed on the left sidebar, which is located on the left side of the screen. The left sidebar is divided into top and bottom categories by a faint line that lies two inches below the top of the sidebar. This section will cover the four options that are displayed in the top category of the left sidebar.

There are two options in the navigation bar that you are able to access: plans and help.

- **Plans:** This option will take you to the screen that lists all of the university's continuity plans.
- **Help:** This option will provide you with a list of FAQs, contacts, and references to help you develop and review your plan.

Plan Details

This section contains basic information concerning your department and plan. There are six subsections in Plan Details. These six subsections are: department information, action items summary, download documents, manage plan access, update plan status, and resources.

Department Information: This subsection shows general information or data about your department and is similar to the Step 1: Department Identification tab in the legacy system.

Action Items Summary: This subsection lists all action item(s) associated with your plan and is similar to the Action Item Summary tab in the legacy system.

Filtering action items

- You can filter which action items are shown on the screen by clicking the drop-down arrow under "Display Status" and selecting the status you would like to see.
- Only action items with the status you select will be pulled up on the screen.
 - Note: This can make it easier to keep track of which action items are completed, not yet begun, archived, in progress, etc.

Sorting action items

- Action items can also be sorted by clicking the drop-down arrow under “Sort By” and selecting the variable you would like to sort by.
- Action items can be sorted by:
 - The critical function that they serve
 - Their estimated cost
 - The cost frequency
 - Whose scope that action item falls under
 - The date that the action item was entered
 - Who the action item was assigned to
 - The action item’s due date
 - The status of the action item

Archiving an action item

- An action item can only be archived while in edit mode (see [Switching between view and edit modes](#)).
- Select the “archive” button that is to the far right of the action item that you wish to archive.
- The action item that you selected will now be archived. To see the action items that are already in archives, see [Filtering action items](#) in the [Plan Details](#) section.

Editing an action item

- An action item can only be edited when in edit mode (see [Switching between view and edit modes](#)).
- Select the “edit” button that is to the far right of the action item that you wish to edit.
- A new window will pop up, showing you the action item’s information. Make the necessary changes. Select “save” when you are done.

Downloaded Documents: This subsection lists documents that have been uploaded for your plan. At any time, you can select the links on this page and download the documents.

- *Note:* You cannot upload documents to your plan while on this screen. To upload documents, see [Adding new documents](#).

Manage Plan Access: In this subsection, you can control who has access to your plan. Only plan managers can view this screen (see explanation of users/roles below for more information). On this screen, you can edit the type of access a current user has, change a user’s information, or add a new user. There are three types of users or roles that can be assigned on this screen:

- *Plan managers:* The creator(s) of the continuity plan is automatically a manager. A manager can add other managers and edit the plan.
- *Plan editors:* Editors can edit and view the plan, but cannot manage access for other users. Editors do not have access to this screen.
- *Plan viewers:* Viewers can view, but not edit the plan. Viewers do not have access to this screen.

Editing a current user

- A user can only be edited when you are in edit mode (see [Switching between view and edit modes](#)).
- To edit a user who is already on your “Manage Plan Access” list, select the “edit” button that is to the far right of the user’s name.
 - *Note:* The only piece of information that can be edited is the type of access they have. If any other information needs to be changed please contact Courtney Shaw.

Adding a new user

- A new user can only be added when you are in edit mode (see [Switching between view and edit modes](#)).
- To add a new user to your “Manage Plan Access” list, select the + in the “Select a user” box and enter in the required information. If you are not able to locate the user you are wishing to add, contact either Courtney Shaw.

Deleting a user

- A user can only be deleted if you are in edit mode (see [Switching between view and edit modes](#)).
- To remove a user from your “Manage Plan Access” list, select the “delete” button that is to the far right of the user’s name.

Update Plan Status: This subsection assists in keeping up with the status of your plan. In the legacy system, there were two buttons that would control the status of your plan (“Instructions for Plan Sign-Off” and “Instructions for Annual Review Sign-Off”). This screen will display the name of the person who updated the plan’s status, their role, the date of the status update, what status was given to the plan, and any comments made at the time of the update.

There are five statuses that can be given to your plan: in-progress, complete, due for review, in review, and current. Below is a brief explanation of what each status consists of.

- *In-Progress:* A plan that is currently being written or edited. This is the default status for all new plans.
- *Complete:* A plan that is done with being written and edited.
- *Due for Review:* An existing plan that needs to be reviewed as part of the annual review cycle.
- *In Review:* An existing plan that is in the process of being reviewed.
- *Current:* An existing plan that has been reviewed and contains up-to-date information.

Updating your plan's status

- A plan's status can only be updated in edit mode (see [Switching between view and edit modes](#)).
- To update your plan's status, select the "+ Update Plan Status" button that is slightly to the right of the screen.
- Fill in the necessary information.
- Select "Save."
 - *Note:* A status update can be deleted up to seven days after it has been created. After that, the status update becomes permanent.

Resources: This subsection provides you with multiple kinds of resources that you may use when you are developing or updating your plan. The three forms of resources that you will find in this subsection include sample plans, interview forms, and a glossary of commonly used terms. When you select any of the three options, you will be directed to the *Continuity Planning Help* website.

Critical Functions

This section refers to your department's critical functions. Critical functions are the functions that your department performs on a daily basis that are critical to campus operations. You can view a complete list of your department's critical functions by selecting the "Manage Critical Functions" subsection.

Manage Critical Functions: This subsection lists the critical function(s) that your department normally performs. Each function is accompanied by its department-assigned level of criticality. There are four levels of criticality that your department can assign to a critical function. These four levels are critical 1, critical 2, critical 3, and deferrable. Below is a brief description of each.

- *Critical 1:* Critical functions with this level of criticality must be continued at a normal or increased service load. This function cannot be paused and is necessary to life, health, and security.
- *Critical 2:* Critical functions with this level of criticality must be continued if at all possible, perhaps even in reduced mode. Pausing this function completely would have grave consequences.
- *Critical 3:* Critical functions with this level of criticality can be paused if they are forced to do so, but must resume in 30 days or less.
- *Deferrable:* Critical functions with this level of criticality may be paused and then resumed when conditions permit. No adverse effects will result from pausing this critical function.

There is not set minimum or maximum amount of critical functions that your department must have. From this screen, you can easily move, edit, delete, or add critical functions.

Moving a critical function

- A critical function can only be moved when you are in edit mode (see [Switching between view and edit modes](#)).
- When you are looking at the list of critical functions in the “Manage Critical Functions” tab, you can move the order in which the critical functions are presented. To do this, you simply select the ≡ symbol that is to the left of the critical function you wish to move and then drag it to the desired position/ranking.

Editing a critical function

- A critical function can only be edited in edit mode (see [Switching between view and edit modes](#)).
- There are two ways you can edit a critical function: from the “Manage” tab or through the critical function’s individual tab.
 - From the “Manage” tab:
 - While still on the “Manage Critical Functions” tab, you can select the “edit” button that is to the far right of the function you wish to edit.
 - You will then be directed to the tab of the critical function that you selected. Edit the necessary information.
 - Through the critical function’s individual tab:
 - Select the name of the critical function you wish to edit from the options listed under “Manage Critical Functions” in the left sidebar.
 - A list of subsections will appear under the critical function.
 - Select the subsection you wish to edit.
 - You will be taken to that critical function’s tab, where you can begin editing the selected subsection.
 - You can move to a different subsection at any time.

Deleting a critical function

- A critical function can only be deleted in edit mode (see [Switching between view and edit modes](#)).
- Critical functions can only be deleted from the “Manage Critical Functions” tab. To delete a critical function, select the “delete” button that is to the far right of the critical function you wish to delete.

Adding a critical function

- Critical functions can only be added while in edit mode.
- While on the “Manage Critical Functions” tab, select the “+ Add Critical Function” button that is slightly to the right of the screen.
- Fill in the necessary information. Select “save.” The newly added critical function will then appear on the list of critical functions in the left sidebar.
 - *Note:* Make sure you fill in the subsections of your newly-created critical function. See [Editing a critical function](#) for reference.

List of Critical Functions: Beneath “Manage Critical Functions” is a list of the different critical functions for your plan. Each of these critical functions has their own grouping of subsections that provide various kinds of information for each critical function. These subsections are:

- *Description:* This subsection provides basic information about the critical function. Such information includes the critical function’s name, level of criticality, description, section or unit responsible for the critical function, and the specific people within that section or unit responsible for performing the function.
- *Peak Periods:* This subsection shows the time(s) of year during which the performance of the critical function is at its peak. Departments can choose from any of the 12 months to show when the peak performance of this critical function occurs. You may also provide an explanation for your department’s selection(s).
- *Documents:* This subsection shows what documents have been downloaded to your plan to support the specific critical function whose tab you are current in. These documents should be very important to this critical function. From this tab, you can view, edit, delete, or add documents.
 - Note: You should only upload documents to this tab if they refer to the specific critical function. Documents that pertain to your department’s whole plan are uploaded in the [Key Resources](#) section (see [Adding new documents](#) for instructions).

Viewing an uploaded document

- To view the uploaded documents, make sure you are in view mode (see [Switching between view and edit modes](#)).
- Select the “view” button that is to the far right of the document you wish to view. A new window will open, showing you information pertaining to the document and the document attachment.
- Select “done” when you are finished looking at the document.

Editing an uploaded document

- To edit documents that are already uploaded to you plan, make sure you are in edit mode (see [Switching between view and edit modes](#)).
- Select the “edit” button that is to the far right of the document you wish to edit.
- A new window will open, allowing you to change information pertaining to the document. This information includes the document name, owner, description, back-up measures, medium, location, contact person, and any comments. You will also see the current attached document and be given the chance to attach a different file.
- Select “save” when you are done.

Deleting an uploaded document

- To delete documents, make sure that you are in edit mode (see [Switching between view and edit modes](#)).
- Select the “delete” button that is to the far right of the document you wish to delete.

Adding a new document

- To add a new document, make sure that you are in edit mode (see [Switching between view and edit modes](#)).
 - Select the “+ Add Document” button that is slightly to the right of the screen.
 - A new window will pop up.
 - Fill in the necessary information and attach a document.
 - Select “Save.”
- *Dependencies:* This subsection identifies the upstream and downstream dependencies of your department. Upstream dependencies are the departments on campus whose reduced functioning would seriously impair your own department’s ability to perform this critical function. Downstream dependencies are the departments that would be seriously impacted if your departments could not perform this critical function.

Deleting a dependency

- These instructions work for both up- and downstream dependencies.
- You can only delete a dependency when you are in edit mode (see [Switching between view and edit modes](#)).
- To delete a dependency, select the “delete” button next to the dependency you wish to delete.

Adding a dependency

- These instructions work for both up- and downstream dependencies.
- You can only add a dependency when you are in edit mode (see [Switching between view and edit modes](#)).
- There are two ways you can add a dependency: Populating the dependencies or adding them manually.
 - Populating the dependencies: You can add dependencies to your list by using this Quick Entry option. This option allows you to copy dependencies from another critical function’s dependencies that you have already filled in.
 - To use this Quick Entry, select the critical function whose dependencies you wish to copy from the drop-down menu at the top of the screen.
 - Select the “Populate Dependencies” button that is next to the drop-down menu.
 - Edit the dependencies as needed.
 - Adding dependencies manually:
 - Select the “+ Upstream Dependency” or “+ Downstream Dependency” button based on whichever dependency you are working on.
 - Select the dependency you wish to add from the drop-down menu or create a custom dependency by typing in the “Custom Dependency” box provided.
 - Select “Save.”

- *Consequences*: This subsection identifies the consequences that might occur should this critical function not be restarted quickly enough following a disaster. This subsection is meant to show why this critical function is important to operations.

Adding a consequence

- There are two ways you can add consequences: Populating the consequences or adding them manually.
 - Populating the consequences: You can input consequences by using this Quick Entry option. This option allows you to copy consequences from another critical function's consequences that you have already filled in.
 - To use this Quick Entry, select the critical function whose consequences you wish to copy from the drop-down menu at the top of the screen.
 - Select the "Population consequences" button that is next to the drop-down menu.
 - Edit the consequences as needed.
 - Adding the consequences manually:
 - Type in or select your department's answers to the questions.
- *How to Cope*: This subsection poses questions that ask you to visualize the conditions that might be present in the weeks or months following a disaster. This subsection will ask you to focus on how you will continue to perform this critical function should certain challenges arise as a result of a disaster.
- *Action Items*: This subsection lists the action item(s) associated with this particular critical function. From this screen, you can view, edit, add, or archive action items.

Viewing an action item

- You can view an action item in either the view or edit mode.
- Regardless of which mode you are in, select the "view" button to the far right of the action item you wish to view.
- A new window will pop up, showing you the action item's information, such as the action item's name, estimated cost, cost frequency, due date, status, assigned person, and scope.
- When you are finished viewing the item, select "Done."

Editing an action item

- This is another screen where you can edit an action item. Follow the instructions outlined in [Editing an action item](#) in the [Plan Details](#) section.

Adding an action item

- An Action Item can only be added when in edit mode (see [Switching between view and edit modes](#)).
- There are two ways you can add an action item: Quick Add or manual entry.
 - Quick Add: The quick way to add an action item.
 - In the empty box below “New Action Item,” type in the action item that you wish to add (just type in the task itself; you will put in more information later).
 - Select the “Quick Add” button that is to the right. You should see your new action item in the Action Item list.
 - Continue with steps found in [Editing an action item](#) to fill in more information for your action item.
 - Manual entry:
 - Select the “+ New Action Item” button that is slightly to the right of the screen.
 - Fill in the necessary information regarding your new action item.
 - When you are done, select “Save.”

Archiving an action item

- This is another screen where you can archive an action item. Follow the instructions outlines in [Archiving an action item](#) in the [Plan Details](#) section.

Information Technology

This section focuses on your department’s IT. Within this section, different applications, servers, and workstations used by your department are identified.

Central Applications: In this subsection, you will see a list of all the applications your department uses that are owned by OIT. Make sure that the only applications listed are those that support your department’s critical functions. Each application should also be supplemented by a level of criticality.

Department Applications: This subsection lists all of the applications your department uses that are owned by your department. The applications listed should only be those that support your department’s critical functions.

Servers: If your departments own any servers, they should be listed here. A description of how the servers assist your department’s critical functions should also be in this subsection. If your department does not own any servers, please make sure the “We own no servers” check box is marked.

Workstations: This subsection focuses on the workstation backup procedures currently being used by your department. There is also a section on the screen where you can identify who provides IT support to your department’s workstations.

How to Restart: This subsection provides you with questions that ask you to think of how you would recover from a disaster that makes your workplace (and IT) inaccessible or unusable.

Action Items: This subsection will provide you with a list of all IT-related action items. You can add action items that are associated with your department’s IT. See [Adding an Action Item](#) for instructions.

Instruction

This section identifies your academic departments that are responsible for teaching students. Any continuity measures that are currently in place for the courses should be mentioned in this section.

- *Note:* As in the legacy system, if you do not provide instruction to students, skip this section.

Manage Departments: This subsection lists the different academic departments that provide instruction. Each department listed on this screen can also be seen in the left sidebar under “Manage Departments.” Departments can be deleted, but not edited on this screen.

List of Academic Departments: Beneath “Manage Departments” is a list of the different academic departments that provide instruction. Each of these departments has their own grouping of subsections that provide various kinds of information. These subsections are: high priority courses, all courses, department practices, special teaching issues, and action items.

- *High Priority Courses:* This subsection identifies the high priority courses within this academic department. High priority courses are considered to be those whose interruption would most threaten the progress of your students and the integrity of the curriculum. There are three criteria that a course must meet to be considered high priority:
 - It is an undergraduate course.
 - It is a large-enrollment course.
 - It is a pre-requisite for a major or part of a sequence.
- *All Courses:* This subsection focuses on the disaster-readiness practices that are currently being used by your instructors to facilitate the continuity of this academic department’s curriculum. In this subsection, estimate your instructors’ current usage of the stated practices, state your opinion on whether or not the stated practice can be expanded within your department, and make any comments you think are necessary.
- *Department Practices:* This subsection focuses on the disaster-readiness practices that are currently being used by your department to facilitate the continuity of this academic department’s curriculum. Practices addressed in this subsection include a strategy for disaster communications, a backup plan for academic personnel, faculty leaves, and innovative teaching methods or practices.
- *Special Teaching Issues:* This subsection identifies and lists any specialized resources and logistics that this academic department requires to continue instruction. Some examples of these include laboratories, design or performance studios, field work/internships/experiential learning, specialized instructional software, and/or access to library or museum collections. This subsection is meant to identify the required resources and logistics that may pose particular challenges to the continuation of instruction after a major disaster.

- **Action Items:** This subsection lists the action item(s) associated with the academic department you are in. From this tab, you can view, edit, add, and/or archive action items belonging to this particular academic department.

Viewing an action item

- Follow the instructions outlined in [Viewing an action item](#) in the [Critical Functions](#) section.

Editing an action item

- Follow the instructions outlined in [Editing an action item](#) in the [Plan Details](#) section.

Adding an action item

- Follow the instructions outlined in [Adding an action item](#) in the [Critical Functions](#) section.

Archiving an action item

- Follow the instructions outlined in [Archiving an action item](#) in the [Plan Details](#) section.

Key Resources

The Key Resources section documents the resources you may need in the event of an emergency. The resources discussed in this section pertain to your department as a whole. Below are the eleven subsections that are found within this section.

Staff Basics: This subsection covers staff-related information. Basic questions pertaining to a department emergency contact list, your department's main phone line, your department's website, and shared passwords are addressed here.

Key People: This subsection lists the key people in your department. Key people are considered to be those you would call upon first in a time of crisis and who have the experience, skills, or authority to help sort things out and plan your department's next steps after a disaster. On this screen, you can designate up to three of your key people as leadership successors and select people who hold formal delegation(s) of authority within your department.

Making a key person a successor or authority holder

- A key person can be made a leadership successor or authority holder only in edit mode.
- Once in edit mode, select the "edit" button that is to the far right of the person who you would like to make a leadership successor or authority holder. If you are adding a new person, select the "+ Add Key Person" button that is slightly to the right of the screen. Either of these methods will take you to the same place.
- A new window will pop up. In the middle column, you will see four check boxes. Select the box that applies to the key person you have selected.
- When you have made the necessary selection(s), select "Save."

Work from Home: This subsection lists staff members who could perform at least part of their normal duties at home. Information such as the employee's name, position, and a comment on how they can connect to their work computers from home can be included in this subsection.

Staff of Other Units: This subsection lists people or departments from elsewhere on campus that you may need to contact within the first few hours or days after a disruptive event. Information that can be included on this screen is the contact's name, department, email, address, work phone, cell phone, fax, and any necessary comments.

Stakeholders: This subsection lists the people or groups outside of the university that your department may need to contact within the first few hours or days after a disruptive event. Examples of people that you would include on this list are vendors, clients, project partners, donors, and/or sponsors.

Documents: This subsection lists documents that have been downloaded to you plan. Your department is encouraged to add documents that are important to the performance of your critical functions. From this screen you can view, edit, delete, and add documents.

Viewing a document

- Follow the instructions outlined in [Adding a new document](#) in the [Critical Functions](#) section.

Editing a document

- Follow the instructions outlined in [Editing an uploaded document](#) in the [Critical Functions](#) section.

Deleting a document

- Follow the instructions outlined in [Deleting an uploaded document](#) in the [Critical Functions](#) section.

Adding a document

- Follow the instructions outlined in [Adding a new document](#) in the [Critical Functions](#) section.

Equipment & Supplies: This subsection allows you to identify the type of equipment or supplies you think you will need to perform your department's critical functions in the event of a disruptive event. For this subsection, indicate the minimum amount of equipment and supplies you think your department will need after a disaster occurs.

Facilities & Transportation: This subsection identifies what special facilities, utilities, or transportation you think your department will need to continue performing its critical functions after a disaster takes place.

Adding a utility

- Utilities can only be added when you are in edit mode (see [Switching between view and edit modes](#) for information on the modes).
- Once in edit mode, you will see a number of drop-down boxes underneath the “Utilities” section of the page.
- To add a utility, select the drop-down arrow of the top-most box.
- Select a single utility from the drop-down list.
- Include a comment about that utility in the comment box to the right of the drop-down box of applicable.
- Continue selecting utilities from the drop-down boxes until you are done. Make sure you save your changes (see [Saving Data](#)).

Adding another utility slot

- You may need to add more utility drop-down boxes if you run out of room. To do this, make sure that you are in edit mode (see [Switching between view and edit modes](#)).
- Once in edit mode, select the “Add a Utility” button that is directly under the “Utilities” section of the page.
- A new utility drop-down box should appear at the bottom of your utilities list.

Right Sidebar

A few other tabs or sections in *Continuity Planning* are displayed on the right sidebar. The right sidebar contains four important items: view/edit page (depending on which mode you are in), print pdf, hide guidance, and the guidance section.

This section will cover the four items that are displayed on the right sidebar.

View/Edit Page: This is the first item that you will see on the right sidebar. You determine what mode you are initially in when you select your plan (see [Selecting your Plan](#) for more information). If you choose to access your plan by selecting “view,” the right sidebar will initially say “Edit Page.” If you choose to access you plan be selecting “edit,” the right sidebar will initially say “View Page.”

- *View Page:* You are in view mode after you select “View Page.” When in view mode, you will see “Edit Page” as an option in the right sidebar. You can look at your plan while in view mode, but you cannot make any changes.
- *Edit Page:* You are in edit mode after you select “Edit Page.” When in edit more, you will see “View Page” as an option in the right sidebar. While in edit mode, you can look at your plan and make changes to it.

Switching between view and edit modes

- If you are in view mode and you wish to switch to edit mode, simply select the “Edit Page” option on the right sidebar.
- If you are in edit mode and you wish to switch to view mode, simply select the “View Page” option on the right sidebar,
- You can easily switch from view mode to edit mode and vice versa on any screen in *Continuity Planning*.

Print PDF: This is the second item you will see on the right sidebar. By selecting this option, you will be taken to another window where a PDF version of your entire plan will be generated. You can save, download, or print the plan from here.

Hide Guidance: This is the third item you will see on the right sidebar. By selecting this option, you will hide the guidance information that is displayed underneath this item. If you have selected this option but wish to see the guidance again, simply select it again and the guidance information will reappear.

Guidance: This is where you can find information that may help you fill out your plan. Various pieces of information, guidance, and suggestions are given here to assist you throughout the plan development process.