CPOtracker is a tool adopted by Loyola University Maryland used in the Business Continuation/Disaster Recovery process. CPOtracker is a web based program that will store disaster recovery materials, etc., that are being completed as part of the university’s efforts to avoid delays in conducting routine business operations in the event of an emergency.

This document is intended to provide instruction on how to upload and manage your Recovery Item documents using the CPOtracker software. Your supervisor will provide direction on determining the content, format and organization of information to include in the CPOtracker system.

Logging In

In your browser (Internet Explorer, Firefox, Safari or Google Chrome) navigate to https://cpohost.com to open the CPOtracker Login page. Fill in the fields for Organization Name, Username and Password according to the instructions in the screenshot below.

If you have forgotten your password click “Forgot Password” on the Login Page. If you have difficulty logging in for any other reason, contact OTS at ots@loyola.edu or x5555.
Summary of System Functions
The following is a summary of the options on the CPOtracker Home Page:

Contacts - allows for Contact information to be listed, added, modified and/or deleted.
Dashboard - allows for all information related to a specific Contact to be displayed and linked.
Team Members - manage Team assignments within a specific Location. Contacts are assigned to one or more Teams related to the recovery effort.
Recovery Items - manage Recovery Items associated with a specific Team.
Recovery Issues - manage Recovery Issues associated with a specific Team.
External Resources - used to define External Resources that may be needed to support the recovery effort.
Call Tree Structures - used to manage Call Tree Structures, details of the emergency phone tree.
Recovery Locations - to specify any Recovery Location assets and resources (items) for individual Teams (or the Location as a whole) that will be needed in case they have to relocate to another location.
Recovery Plans - used to define the structure of Recovery Plans for Teams defined to the Location.
Reports - provides the user with a selection of Reports created from built-in structures, such as the Call Tree, which may be printed, viewed on-line, e-mailed, and/or exported to a variety of formats including PDF, HTML and Microsoft Word.
System Utilities - provides access to a number of system related functions such as Location and Team definition, Organization settings and terminology, General System Codes definition, etc. Many of these options allow CPOtracker to be tailored to meet the organization’s specific needs.
Recovery Items

A critical step in using CPOtracker for disaster recovery is adding Recovery Items. A **Recovery Item** is a specific item that will be needed to assist in the recovery effort in the event of an emergency. Recovery Items are most commonly physical items (documents) that are stored off-site, but they can also be a task or reminder of something that needs to be done. At Loyola, we focus on **document** Recovery Items, though there are other types available in the software.

Recovery Item List

Clicking on the **Recovery Items** option on the home page or on the CPOtracker menu bar will cause the Recovery Item List page to appear. This page displays a list of all Recovery Items that meet the selected criteria specified at the top of the screen (in the Location and Team selection fields). Recovery Items are displayed by order of Team and then Recovery Item Number within Team. From here, existing Recovery Items may be selected for display and you may update or enter a new Recovery Item into the system.
New Recovery Item

Click on this button in the upper right corner of the Recovery Items List to display the Recovery Item Detail screen with all fields cleared and ready to create a new Recovery Item.
Working with Recovery Item Documents

**Location and Team** - indicates the Location and Team for which Recovery Items are being displayed.

**Item Description** - This is a short description of the Recovery Item to allow you to quickly identify the Item. The Item Descriptions are displayed in the Recovery Item List.

**Item Type** - Select from a list of the different types of Recovery Items that have been defined by the System Administrator. Examples of types of Recovery Items include: Storage Item, Document, Task/Reminder. Document is the most common Item Type used.

**Priority** - The Priority drop-down box contains a list of priorities that may be assigned to the Recovery Item. The contents of this field are color coded, to emphasize the Item’s assigned priority. The three levels of priority and their associated colors are: 1 - Red - Highest Priority; most critical for affecting recovery; 2 - Yellow - Middle level Priority; 3 - Blue - Lowest Priority; least critical for affecting recovery. The Priority should be assigned to the Item based on its importance to the Team’s mission and ability to meet its recovery responsibilities.

**Recovery Item Update Frequency** - The Update Frequency field is used to specify how often the Recovery Item is to be updated in off-site storage. The values that appear in this drop-down box are defined in the "Recovery Item Update Frequency Codes" section of the General System Codes (accessed from the System Utilities menu).

**Date of Last Update** - The "Last Update" field is used to indicate the date the Recovery Item was most recently updated. When the Item has been stored, then that date is entered in the Last Update field.

**Date of Next Update** - The "Next Update" field is used to indicate the next date the Recovery Item should be updated in storage. This field is used to determine whether the Recovery Item is "Past Due". This field is automatically updated when the Date of Last Update field is changed, according to the value in the Update Frequency field. For example, if the Last Update field is changed to 9/1/2011 and the update frequency field has a specification of 6 months, when the user leaves the Last Update field, the Next Update field will automatically be set to 3/1/2012.

**Assigned To** - The “Assigned To” field is used to indicate the person that is responsible for maintaining the Recovery Item. This drop-down area contains a list of all contacts in the system that are assigned to one or more teams.

**Storage Location Fields** - These fields collectively define exactly where the Item is physically stored. For physical storage items, you should always select an entry in the Storage Location drop-down box to indicate the location of where the Recovery Item is stored. We are not currently using this type of Recovery item.

**Associated Document** - Each Recovery Item may have an external document associated with it. The types of documents allowed to be associated with Recovery Items are specified by a system configuration parameter at time of system installation.

* denotes required fields
Add New Recovery Item to the Recovery Plan

Once you have created a new Recovery Item and uploaded the document, the Item (which includes the full document) needs to be added to the Recovery Plan Structure. **More than likely, your supervisor will complete this task her/himself but these instructions are included in case she/he has requested that you perform this task.** The Recovery Plan Structure defines the content, format and order of items in the Recovery Plan. The Recovery Plan is a single document that contains all items (with full contents of documents) and reports that have been included along with a Table of Contents. The report is created by clicking the grey “Generate Plan” button at the top of the Recovery Plan Structure Page.

![Diagram of Recovery Plan Structure](image-url)

**Steps to Add Recovery Item to Recovery Plan:**
1. Click Edit
2. Check the select-box of the item
3. Click “Add Selected Items to Structure”
Edit or Update an Existing Recovery Item

From the **Recovery Items List Page**, click on the Recovery Item Description for the item you wish to update from the Recovery Items List to display the **Recovery Item Detail** screen for that item. Make desired changes, including uploading a new version of the document.
Please reference CPOtracker help for more detail on the features described in this document and much more. Your supervisor should provide direction on determining the content, format and organization of information to include in the CPOtracker system. For further assistance with the CPOtracker software, please contact the OTS help desk at x5555 or ots@loyola.edu.