



## CPM Product Test Lab

### Phoenix for Recovery Planning

#### Overview

The two principal goals of any business continuity planning software product are 1) to simplify the process of completing a workable plan, and 2) ensure that all the required elements are included. **Phoenix for Recovery Planning, developed by Binomial International, offers a very cost-effective tool for this process.** Phoenix is available in several different versions *optimized to specific business applications*. These include small businesses, larger enterprises, Internet service providers (ISPs), data centers, banks, and credit unions. Phoenix focuses specifically on *disaster recovery* planning, and not business continuity planning. The product integrates word processing and relational database elements to automate the plan development process. Phoenix has a solid track record of performance, with over 1800 systems shipped, since its introduction in 1993. CPM reviewed Phoenix 2003, Version 6.0.

Among the features are an integrated plan methodology with predefined templates and documentation, database management using Borland BDE technology, user manual (Acrobat format), import/export functions, and Windows-based graphical user interface (GUI).

Phoenix assumes several activities have been completed, including a risk assessment, business impact analysis, and the definition of potential disaster scenarios. Depending on the level of detail and customization, a completed plan can range from 40 to about 100 pages.

When using Phoenix, a good deal of initial research needs to be completed (e.g. vendors, equipment, contact details, various kinds of documentation, team members, notification procedures, vital record requirements, and information technology requirements). Phoenix generates a high-level plan, which is ideal for team members, senior management, emergency response units and other relevant outside organizations. Detailed process-level plans, that can be used to activate recovery facilities, relocate people to another site, restart major systems, and restore business functions, must be created separately.

Before making a purchase decision on Phoenix, *CPM* recommends obtaining a system demo. Despite the product's ease of use, and its many features and resources, we recommend a brief walk-through first. Review the user manual, which is fairly straightforward, and is also available in the system. Also, *CPM* recommends the training support available from Binomial International, if needed.

#### Installation

*CPM* installed Phoenix using a single CD. Insert the CD in the proper drive, and it will launch itself automatically in Windows 2000, NT and XP environments. The Phoenix executable only requires about 6 MB of memory while operating. For older Windows operating systems, insert the CD, proceed to Windows Explorer, and launch the product

using the SETUP utility. Phoenix can also operate in networks. Be sure to review this kind of installation with a network administrator and Binomial for the best installation. Once the system has been launched, you'll see a splash page with the product name, and then the main screen. You'll need a registration number from Binomial to complete the installation process. CPM installed several versions of Phoenix; each took less than five minutes to install.

## Operation

The main screen for Phoenix has three primary elements: Procedures, Teams, and Databases. Assuming you are in a hurry, the product comes complete with its own resident plan documentation and database components. Simply create a new plan name, and start with the Procedures button. On the left hand side of the screen is an outline of the entire plan document. Simply toggle the plan elements you like, and the system begins building the plan. The main screen offers you space to edit the Phoenix -supplied text, and you can also create your own text, as needed. Any time you like, you can click on the Preview button and see how your plan looks.

Next, click on the Teams button; define your teams and their responsibilities. This is also a matter of selecting a team, and toggling among four choices: Team Responsibilities, Pre-Disaster Team Activity, During Disaster Team Activity, and Post-Disaster Team Activity. Each comes with its own embedded text, and you can edit this the same as with Procedures. Having built team descriptions, you finally click on the Databases button. Click on the pull-down list, select a category, and begin creating the databases. Eighteen categories are provided, each with its own preset data forms to fill out. You can modify pre-configured database functions and fields, and create new databases as needed.

*The Phoenix process is one of the most straightforward we have seen at CPM.* The result is a high-level plan, without lots of process-level detail. For many organizations this is just enough detail to serve as a first line of defense plan. If possible, it helps to have as much data as possible prepared in advance. Once all three components are completed, click the Preview button again to see how things look. Finally, print out the finished report. If needed, files can be imported or exported, which is useful for backing up the plan.

**CPM estimates that a disaster recovery plan using Phoenix, developed for a medium-sized company with about 250-300 employees in four to six divisions at a single location, could be completed and ready for implementation and exercising in about one week.** As always, the amount of time required is largely dependent on the time needed for plan design, data gathering, availability of personnel to support plan development, and the level of detail required.

## Documentation

The Phoenix user guide is available in hardcopy or electronic versions. It is normally part of the system (located in the Help area), and is formatted as an Adobe Acrobat (\*.pdf) file. At first glance, the user manual appears rather unassuming, compared to other products we've reviewed. However, this is a reflection on the plan's elegant simplicity. *It simply doesn't need a heavily detailed user manual.* CPM noted a number of minor content errors that we shared with the developer; these will be revised shortly. The documentation generally assumes the user will not alter the overall plan structure, methodology or embedded text. Once the system has started, clicking on Help launches excellent contents, index and search functions.

## Usefulness

Once your Phoenix plan is completed, be sure to exercise it. This will ensure that the recovery process defined by Phoenix will work for your firm in a crisis. Remember that Phoenix generates a high-level plan that provides good overall direction, but it doesn't provide step-by-step technical procedures you may need for specific activities.

**In CPM's opinion, Phoenix for Recovery Planning (all versions) has an excellent, intuitive process for disaster recovery plan development.** Over 1800 systems have been installed, and the product is regularly updated. The user interface is among the best we've seen. The user guide, while essentially average, is not really needed, as **the system is so easy to use.** CPM believes Phoenix for Recovery Planning offers excellent value for money.

## PRODUCT DETAILS

Product Name	<b>Phoenix For Recovery Planning</b> , available in several versions, including Small Business Edition, Corporation Edition, Phoenix for Internet Service Providers, Phoenix for Data Centers, Phoenix for Banks, and Phoenix for Credit Unions
Company	Binomial International, Inc.
Address	812 Proctor Avenue Ogdensburg, New York 13669
Contact	Mr. Dale Windle
Phone	1-877-246-6642
Fax	1-702-925-3071
Toll-Free	1-877-246-6642
E-mail	<a href="mailto:sales@DisasterRecovery.com">sales@DisasterRecovery.com</a>
Web Site	<a href="http://www.DisasterRecovery.com">www.DisasterRecovery.com</a>
Price	Single user license pricing ranges from US \$745 (Phoenix Lite) to US \$2,499 (Phoenix for Banks). Multi-user licenses range from US \$3,500 to US \$11,900, depending on product. All versions are fully network enabled, include documentation and CD, price protection, and discounted prices on the firm's seminars.
Distribution	Direct and through resellers
Training	On-site training, one-on-one by phone and through power point tutorials.
Warranty	30 days free support, 1-year maintenance and support plans available for 15% of the purchase price of the product
Maintenance	Email, phone and web. Maintenance and support package includes unlimited support by email or phone.
System Environment	Pentium 2 - 333 Mhz, 128 MB RAM, requires 20 MB of disk space for installation. Each plan version created adds space on top of this.
Installation	Web site download or install from CD
Competition	No direct competitors for vertical market products, including Phoenix for Internet Service Providers, Phoenix for Data Centers, Phoenix for Banks, and Phoenix for Credit Unions.

## CPM RATING

\* Poor \*\* Fair \*\*\* Average \*\*\*\* Very Good \*\*\*\*\* Excellent

Installation	***
Operation	*****
Documentation	***
Usefulness	****
Value for Money	*****
Overall Rating	****

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