

# Toolkit

The IT Peer Community. No Vendors. Ever.



## MICROSOFT OFFICE

These NOREX Member-contributed Microsoft Office related documents include guides, O365, OneDrive, patch management, SharePoint, Windows, polls, discussion transcripts, and job descriptions. | TK008

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**TO REQUEST A DOCUMENT FROM THIS TOOLKIT,  
NOTE THE TITLE / NUMBER AND ADD THEM TO THE  
COMMENTS AREA ON THE REQUEST FORM [HERE](#).**

## Guides and Policies

**EXCHANGE MIGRATION SOW** This Statement of Work is for end-to-end planning and implementation services in migration of an on-premises Microsoft Exchange 2010 environment to 365 Exchange Online Services. 5 Pages (20-1138)

**MICROSOFT TOOL USAGE GUIDELINES** This document describes which Microsoft tool is best for storage, communication, retention, and document management. 2 Pages (20-1099)

**TIPS AND TRICKS FOR USING BOX** A Member shares tips for using Box for managing, securing, sharing and governing content for your internal and external collaboration and processes. 10 Pages (20-903)

**USING RINGCENTRAL** Tips for using RingCentral, a solution for global enterprise Cloud communications and collaboration solutions. 4 Pages (20-902)

**USING MICROSOFT TEAMS** Microsoft Teams allows you to collaborate and easily connect with your colleagues and contacts. These are some tips for its use. 10 Pages (20-901)

**DATA ARCHITECTURE MATRIX** This matrix explores use and service of collaboration tools such as OneDrive, Outlook, SharePoint, Teams, and other Office tools. 2 Pages (20-864)

**IT CLOUD STRATEGY** Cloud services include Software as a Service (SaaS), Infrastructure as a Service (IaaS), and Platform as a Service (PaaS), and this strategy focuses on productivity applications as well as data protection. 23 Pages (20-587)

**INTUNE POLICY** The following template informs employees about company policy on the use of Microsoft Intune for centralized management of mobile devices. 2 Pages (20-457)

**ONEDRIVE CLOUD STORAGE POLICY** This policy establishes guidelines regarding support and usage of the authorized OneDrive Cloud Storage. 8 Pages (20-230)

**MS PROJECT DEVELOPMENT** This project will develop a web application supported by IT that maintains the callout rotation and employee responses for a callout incident. 26 Pages (50-315)

**COMMUNICATIONS USE CASE GUIDE** This slide offers concise comparison of Yammer, Outlook, Microsoft Teams, Live Events, and SharePoint. 1 Page (50-297)

## Job Descriptions

**IT MICROSOFT DEVELOPER** 3 Pages (20-839)

**MICROSOFT DEVELOPER** 4 Pages (20-838)

**OFFICE 365 ENGINEER** 4 Pages (20-492)

## Microsoft Security

**OPERATING SYSTEM SECURITY POLICY** The scope of this policy encompasses all operating systems, including but not limited to, main frame, network, Microsoft Windows, Unix, Linux, and SQL Server implementations. 1 Page (20-547)

**MICROSOFT CLOUD SECURITY** These slides represent a company making a secure transition to the Cloud. 25 Pages (20-534)

**WINDOWS 10 SECURITY CONFIGURATION** This document provides an overview of the new security technologies in Windows 10 and a set of recommendations for the deployment of the new operating system to the workstation environment. 36 Pages (20-209)

## Office 365 / Microsoft 365

**M365 SHAREPOINT TIPS** This document provides some tips and tricks when using the Microsoft 365 Suite. 16 Pages (20-1175)

**WORK AND COLLABORATION WITH O365** This presentation describes how to utilize all the functions and features of Office 365 for email, storing or sharing files, and learning concepts including whiteboarding, safe links, and offboarding. 47 Pages (20-1174)

**O365 SHAREPOINT COLLABORATION** The Office 365 SharePoint Collaboration Group develops, implements, refines, and publishes best practices for the use of O365 SharePoint and Teams. 2 Pages (20-668)

**O365: WHAT TO USE WHEN** The following diagrams provide insight on what Office 365 tools should be used for what functions. 2 Pages (20-598)

**OFFICE 365 MIGRATION DIAGRAM** This diagram shows the migration breakdown by groups, communication sites, and necessary features. 1 Page (20-597)

**E-MAIL SERVICES / OFFICE SUITE EVALUATION** Following is a comparison of the functional requirements and cost summary of Web-Based Office Suite (WBOS) such as Google Apps or Office 365. 16 Pages (20-061)

**O365 DEPLOYMENT CHECKLIST** Following is a basic checklist for when planning a deployment of Office 365. 1 Page (20-050)

**OFFICE PRODUCTIVITY REQUIREMENTS** This spreadsheet provides a template for productivity evaluations, functionality & spam reporting, as well as calendar, directory, migration, meetings, and other topics. 8 Pages (50-283)

## OneDrive

**ONEDRIVE FOR BUSINESS TERMS OF USE** The proper use and administration of the OneDrive service is defined. 3 Pages (20-1228)

**ONEDRIVE FOR BUSINESS GOVERNANCE** This document governs the administration, maintenance, and support of the OneDrive for Business tenant. 4 Pages (20-1227)

**ONEDRIVE ADVANCED DOCUMENT LIBRARY SKILLS FOR SUCCESS** The goal is to create an agenda to ensure that the communications / training plan introduces the user to key skills for managing document libraries. 2 Pages (20-262)

**ONEDRIVE CLOUD STORAGE POLICY** This policy establishes guidelines regarding support and usage of the authorized OneDrive Cloud Storage. 8 Pages (20-230)

## Patch Management

**SERVER BUILD REQUEST TEMPLATE** The following process can be followed when it becomes necessary to request new servers. 4 Pages (20-738)

**PATCHING PROCESS** This is an example of a patching schedule broken into two main patch weeks, with a third week available if needed. 1 Page (20-737)

**PATCH MANAGEMENT SECURITY STANDARD** As set forth in this standard, the Patch Advisory Team meets monthly to ensure all known and reasonable defenses are in place to reduce network vulnerabilities while keeping the network operating. 2 Pages (20-546)

## SharePoint

**SHAREPOINT ONLINE TERMS OF USE** The proper use and administration of the SharePoint Online service is defined. 3 Pages (20-1226)

**SHAREPOINT ONLINE GOVERNANCE** This document governs the administration, maintenance, and support of a production SharePoint Online tenant as well as the external tenant used for external sharing. 8 Pages (20-1225)

**SHAREPOINT GOVERNANCE POLICY** This policy defines requirements, processes, roles, and responsibilities for SharePoint environment development and administration. 5 Pages (20-1203)

**TEAMS & SHAREPOINT FILE SHARE MIGRATION** Given at a 2022 NOREX event, this presentation provides detailed insights on file share migration using SharePoint Online and Microsoft Teams. 21 Pages (20-1117)

**LEARNING SHAREPOINT: MEMBER PERSPECTIVES** A member shares learning notes and links for obtaining SharePoint tips and instructions. 9 Pages (20-694)

**O365 SHAREPOINT COLLABORATION** The Office 365 SharePoint Collaboration Group develops, implements, refines, and publishes best practices for the use of O365 SharePoint and Teams. 2 Pages (20-668)

**SHAREPOINT ONLINE EXTERNAL ACCESS PROCEDURE** Follow this procedure to configure SharePoint Online access for external users. 5 Pages 20-426

**SHAREPOINT BUILD & MIGRATION** A company builds a new SharePoint 2016 environment and migrates the content from the current SharePoint 2010 environment. 14 Pages (20-347)

**SHAREPOINT SITE OWNER HANDBOOK** This document provides an overview of the SharePoint Site Owner Handbook and the responsibilities of a SharePoint Site Owner. 2 Pages (20-343)

**SHAREPOINT STANDARDS** Standards, training, and best practices for the SharePoint platform are outlined here. 2 Pages (20-342)

**SHAREPOINT ENTERPRISE PRODUCTION FARM** This is an example of a SharePoint 2013 production farm, showing size requirements for load balancing. 1 Page (20-341)

**SHAREPOINT 2016 USER GUIDE** This user guide references alerts, assigning permissions, library / versioning, and recovering deleted items. 9 Pages (20-232)

**SHAREPOINT 2013 PRE-ASSESSMENT** Inside this document are a variety of technical pre-assessment questions regarding the current applications and IT infrastructure. It also has key stakeholder interviews and Microsoft SharePoint Best Practices to determine how Microsoft SharePoint can assist the organization. 11 Pages (20-119)

**SHAREPOINT GOVERNANCE GUIDE** A comprehensive governance plan can benefit information systems and the organizations it services. 95 Pages (20-117)

**SHAREPOINT GOVERNANCE MODEL** The model is a comprehensive document identifying lines of ownership for business & technical teams, defining areas of responsibility and establishing appropriate usage of the SharePoint environments. 24 Pages (20-109)

**NETWORK DRIVES CHART** The following chart shows file servers, SharePoint, and OnBase structures, content, collaboration, and more comparisons. 1 Page (20-101)

**OVERVIEW OF SHAREPOINT CAPABILITIES** The content management and collaboration capabilities of SharePoint 2013 are outlined in this document. 3 Pages (20-007)

**SHAREPOINT DOCUMENT & RECORDS MANAGEMENT** This document outlines foundational & advanced document/records management and eDiscovery with SharePoint. 3 Pages (20-006)

**INTRODUCTION TO METADATA** The following documentation will lay out what metadata is, what it is used for, and how it works in reference to classic or modern SharePoint. 12 Pages (50-338)

**INTRODUCTION TO CLASSIC SHAREPOINT LISTS** This document describes how to access, create, and modify SharePoint Classic Lists. 9 Pages (50-337)

**INTRODUCTION TO CLASSIC SHAREPOINT LIBRARIES** This document describes how to access, create, and modify SharePoint Classic Libraries. 10 Pages (50-336)

## Teams

**MICROSOFT TEAMS TERMS OF USE** The proper use and administration of the Microsoft Teams service is defined. 3 Pages (20-1230)

**MICROSOFT TEAMS GOVERNANCE AND POLICY** This document establishes standards and guidelines for the use of Microsoft Teams and explains its coexistence with other collaboration technology. 8 Pages (20-1229)

**TEAMS CALLING AND MEETING SURVEY** This survey asks users' experiences using Microsoft Teams for calling and meetings. 9 Pages (20-1165)

**TEAMS CALLS USER SURVEY** This questionnaire asks users to provide details on training, use, and satisfaction with MS Teams Calls. 3 Pages (20-1162)

**MS TEAMS PHONE SYSTEM PLAN** The following is a design plan for implementation of Microsoft Teams Online with Direct Routing and Cloud Voicemail. 28 Pages (20-1129)

**MICROSOFT TEAMS OVERVIEW** This document describes Teams features such as chat, video meetings, file storage, calendar, and application integration. 9 Pages (20-1075)

**MS TEAMS GOVERNANCE AND POLICY** Microsoft Teams naming, organization, features, compliance, and security are presented in this policy. 10 Pages (20-1037)

**EMAIL TEMPLATE: MS TEAMS ROLLOUT** This template is an example of how to announce an upcoming Microsoft Teams rollout to your team. 1 Page (20-930)

**MS FORMS REQUEST** This is a group of request forms for using several components of Microsoft Teams. 11 Pages (20-920)

**MS TEAMS STANDARDS** This document establishes standards and guidelines for the usage of Microsoft Teams. 4 Pages (20-919)

**TEAMS SETUP QUESTIONS** This questionnaire is a list of a few simple ways to organize how you can arrange your newly-formed Microsoft Teams program. 1 Page (20-911)

**USING ONEDRIVE** This training provides information on managing files and folders, file sharing, best practices, and how OneDrive connects to SharePoint. 14 Pages (50-340)

**MICROSOFT TEAMS DOCUMENTATION** This document documents explores why and how to use Teams, including access, navigation, and best practices. 16 Pages (50-339)

**MS TEAMS GUEST ACCESS REQUEST** This form is for requesting guest user access to Microsoft Teams. 1 Page (50-331)

**MS TEAMS QUICK START GUIDE** This document provides basic information on getting your organization started using Microsoft Teams. 3 Pages (50-330)

**HOW TO USE MICROSOFT TEAMS** This document provides instruction for first-time users of Microsoft Teams for a chat-based workspace in O365. 16 Pages (50-329)

**INTRO TO MICROSOFT TEAMS** This presentation offers insight on key features, navigation, specifications, best practices, and why Teams could be a good option. 10 Pages (50-328)

**TEAMS WHITELISTING & PROVISIONING** Domain whitelisting capabilities and provisioning in Microsoft Teams are discussed in this presentation. 4 Pages (50-327)

## Windows

**SECURE NETWORK CONFIGURATION** This standard offers guidance for secure configuration of computer networks within the organization. 6 Pages (20-1132)

**SECURE WINDOWS DEVICE CONFIGURATION** This standard offers guidance for secure configuration of Windows devices attached to the computer networks within the organization. 4 Pages (20-1131)

**SECURE WINDOWS SERVER CONFIGURATION** This standard provides guidance for a secure Windows server configuration covering any device running on a Microsoft Windows operating system. 5 Pages (20-1130)

**WINDOWS 7 TO 10 PROJECT EVALUATION** A Member shares an example of a Windows 7 to 10 upgrade project questionnaire. 1 Page (20-841)

**WINDOWS APPLICATIONS ACCESS FORM** This form provides basic information for and about persons who wish to attain access to Windows applications on the corporate network. 1 Page (20-599)

**WINDOWS 10 DEPLOYMENT & REFRESH** Included are directions and processes for new deployments and refreshes on laptops and desktops. 3 Pages (20-397)

**WaaS READINESS STRATEGY** With the Windows 10 Operating System, Microsoft is using what it calls “Windows-as-a-Service” for the release of new features and functionality. This document is intended to prepare the organization for the WaaS process, which promises enhanced reliability and security while simplifying the deployment of new features. 20 Pages (20-267)

**WINDOWS 10 SECURITY CONFIGURATION** This document provides an overview of the new security technologies in Windows 10 and a set of recommendations for the deployment of the new operating system to the workstation environment. 36 Pages (20-209)

**W10 / OFFICE 2016 UPGRADE** The following is a presentation for a Windows 10 / Office 2016 upgrade and lifecycle project. 13 Pages (20-114)

## Transcripts & Polls

**PRIVACY LAWS TRANSCRIPT** NOREX Members discussed privacy law compliance; departments best suited to manage privacy; sources consulted to measure compliance against; developing and keeping current a Record of Processing Activities (ROPA); Privacy Impact Assessments (PIA) tools; NIST CSF core functions; Chief Privacy Officer or Chief Compliance Officer; audit frequency of IT tools to ensure privacy law compliance; leveraging internal audits to evaluate privacy programs; and US federal legislation on privacy laws. 13 Pages (NV2471)

**MFA & IDENTITY ACCESS MANAGEMENT FOR ADMINISTRATORS TRANSCRIPT** NOREX Members discussed the definitions of MFA, IAM, and PAM; cyber insurance requirements; MFA tools; MFA usage trends; enforcing MFA with M365; MFA for non-admins; MFA for non-service accounts; threat detection and response; automated detection tools; passwordless authentication; phishing resistant MFA; and password vault usage. 21 Pages (NV2468)

**CONFERENCE ROOM TECHNOLOGY SOLUTIONS TRANSCRIPT** NOREX Members discussed conference room monitoring and management strategies; staff dedicated to conference room management and troubleshooting; training capable users; tool experiences and recommendations; cost of conference room technology solutions; projectors vs TVs; moving away from complex-type rooms to Microsoft Teams rooms; Microsoft licensing; camera options; using Teams with non-Teams meetings; hybrid solutions; accommodating classroom meetings; microphone considerations; and large occupancy rooms. 25 Pages (NV2464)

**GOVERNMENT: CYBERSECURITY TRANSCRIPT** NOREX Members discussed significant changes to the cybersecurity program considering the current threat landscape; optimizing the organizational structure; cybersecurity priorities for leadership; AI considerations; accommodating business needs while maintaining effective security; recommended cybersecurity tools; Microsoft tools utilized; G3 M365 licensing experiences; and security frameworks. 14 Pages (NV2463)

**CLOUD PHONE SYSTEMS TRANSCRIPT** NOREX Members discussed initial cost per user for a Cloud phone system vs VoIP system; Cloud phone providers and moving from a Cisco Unified Communication Manager (CUCM) VoIP system; Teams integration (8x8 vs RingCentral vs others); direct routing vs Cloud-hosted / managed; replacing an older on-prem Mitel system; Dialpad usage; issues with Teams; Operator Connect or direct routing integration with Teams; Vonage Premier unified communications with mobility; all-in-one VoIP / chat / video / mobile solutions for call routing workflows and SMS user requirements; devices on desktop vs softphones; Kari's Law and RAY BAUM'S Act compliance with regard to Cloud Phone Systems; and data ownership and PCI considerations. 23 Pages (NV2460)

**DATA GOVERNANCE TRANSCRIPT** NOREX Members discussed how data governance is defined and does it include data quality and master data; the scope of data governance (creation to deletion); who drives data governance; critical departments included in data governance; best practices and framework to launch data governance; balancing data governance with self-service reporting; tips to get the business to see the value in data governance; tactics to push business units to take ownership of data; tools used in tracking and starting a data governance committee; handling compliance and security questionnaires asking assets to be classified with a data label; social media apps on corporate cell phones; stakeholders for data-only Change Advisory Board; and integrating disparate software solutions / single product that delivers 80% for governance. 14 Pages (NV2459)

**IT GOVERNANCE TRANSCRIPT** NOREX Members discussed defining and initiating IT Governance; lessons learned; data governance; pain points when starting IT governance; ensuring effective governance; where IT governance sits in the organization; authority to accept or reject proposed governance policies; promoting governance as a value-add; producing policies and guidelines; governing "citizen development"; governance tools; and securing vulnerable legacy systems. 18 Pages (NV2457)

**DATA ANALYTICS / BUSINESS INTELLIGENCE TRANSCRIPT** NOREX Members discussed challenges with Data Analytics and Business Intelligence; dedicated teams to manage DA / BI; tooling in use; Azure Analysis and Synapse analytics; third-party connectors; Cloud vs on-prem vs hybrid environments; leveraging Cloud computing resources to improve data modeling and processing times; implementing a Master Data Management solution; Machine Learning deployments; enabling self-service capabilities; data quality; and measuring the effectiveness of DA / BI systems. 20 Pages (NV2456)

**PROJECT MANAGEMENT TRANSCRIPT** NOREX Members discussed leadership buy-in to form an infrastructure PM team; applications in use to track project deliverables and progress; tools utilized for project management; scheduling time for projects daily and across a calendar year; pros and cons of using Microsoft Project Online; combining traditional project management methods (Waterfall) with the Agile methodology (Scrum); working with Agile Development Teams when the business is Waterfall process; platform to work with multiple IT stakeholders who use Jira and ServiceNow; and allocating time for the unexpected work driven by business needs. 18 Pages (NV2451)

**SD-WAN TRANSCRIPT** NOREX Members discussed SD-WAN vs traditional WAN; pitfalls and costs of deploying SD-WAN; best SD-WAN solutions; replacing virtual SonicWall appliances at locations with Fortinet devices; performance SLAs in use; managing your own SD-WAN equipment vs using a managed services approach; pros / cons of using single vendor for all networks vs using a standalone SD-WAN next to the big-name network solutions; using SD-WAN to connect to Cloud service providers; using IPsec tunnels; managing multiple carriers; and using SD-WAN to provide communications for SCADA systems. 20 Pages (NV2448)

**HEALTHCARE INDUSTRY IT SECURITY TRANSCRIPT** NOREX Members discussed when risk outweighs an operational mandate; managing comprehensive security; successful tool and processes for centralized or almost-centralized security management; state of cybersecurity infrastructure; routine tests to measure cybersecurity readiness; managing outside access requests such as VPN connections, vendor contract workers, etc.; Cloud-hosted EMRs; responding to natural disasters or other emergencies; and best practices for recruiting and retaining talent. 14 Pages (NV2447)

**PATCH MANAGEMENT TRANSCRIPT** NOREX Members discussed the best tools other than WSUS for patching servers and the time to report after the patch is installed; the level of automation when patching servers; automation tools for patching 3rd-party software besides SCCM; process for manually patching servers / software; enforcing or forcing workstation reboots to ensure updates and patches are applied; efficient patching and vulnerability scan frequency; VDI patching; Linux patching; Ivanti with Intune; and updating hardware drivers. 13 Pages (NV2444)

**LICENSING / CONTRACT NEGOTIATIONS TRANSCRIPT** NOREX Members discussed IT Contract Management vs IT License Management and who should manage each; negotiating renewals and strategies to keep price increases at a minimum; questions to ask a vendor to determine a good deal; 3rd-party services to support negotiations; handling Managed Service Contracts; Service Level Agreements; tools for License and Contract Management; and Non-Disclosure Agreements. 21 Pages (NV2441)

**ERP STRATEGIES TRANSCRIPT** NOREX Members discussed managing ERP workload across the organization's teams; running ERP globally; on-prem vs Cloud-hosted, single vs multi-instance, regional support vs central support teams; running multiple unique ERPs and financial considerations; implementing Electronic Data Interchange (EDI); the value of implementing an EDI solution and ERP solution; Dynamics 365 ERP accessing ERP data through the Dataverse; Asset Management features of Dynamics F&O; implementing a WMS; migrating from EBS to another ERP system; SAP ECC to SAP S/4; and keeping inventory in sync between 3PLs and the ERP. 17 Pages (NV2435)

**PASSWORD MANAGEMENT TRANSCRIPT** NOREX Members discussed NIST password guidelines; verifying users for password reset without using the last four of SSN or employee ID number; critical steps to be taken before rolling out a Password Management solution; enterprise, end-user password solutions (LastPass, 1Password, Keeper, and Dashlane); user adoption of an Enterprise Password Manager; Windows Hello for Business and Beyond Identity for passwordless authentication; utilizing an MFA security thumb key; requiring two-factor or multi-factor authentication; and secure backup strategy. 21 Pages (NV2434)



**MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT** NOREX Members discussed preventing MFA fatigue; minimizing the impact to registration of the users before enabling MFA; passwordless MFA configured through Microsoft Azure by conditional access; applying MFA for service accounts; handling MFA for admins; utilizing PAM solutions and if this will be a requirement for cyber insurance; white glove configuration of new laptops; startup difficulties to retrofit SSO into the existing environment; and adopting SSO for third-party accounts that employees frequently access. 19 Pages (NV2432)

**SERVICENOW TRANSCRIPT** NOREX Members discussed the reasons to select ServiceNow and moving from other toolsets; pros / cons with implementing ServiceNow; utilizing customizations within ServiceNow and experiences with customizations during system upgrades; time to implement ServiceNow; staffing model for management; end user experience via mobile usage; Configuration Management Database; Teams integration and deploying the catalog / portal to the Teams client; Employee Center; integrating ServiceNow with work-tracking systems like Azure DevOps; Software Asset Management module; ServiceNow Discovery tools; metrics to measure customer experience; and Project Management module. 28 Pages (NV2429)

**EDUCATION IT ISSUES TRANSCRIPT** NOREX Members discussed lessons learned while managing a school population that suddenly went remote; remote management tools used to patch and support checked-out equipment; changes in IT staffing needs when changing from on-prem to remote; downsizing Zoom licensing with the move back to mostly in-person classes; implementing Class for Zoom; applications used to manage phones and tablets coming onto campus; applications used to manage and push data to students' tablets; helpful and / or required security certificates; Moodle LMS and other vendors such as Canvas and D2L; airSlate / signNow over DocuSign and PandaDoc; and partnering with Coursera. 12 Pages (NV2426)

**SQL SERVER TRANSCRIPT** NOREX Members discussed current version of SQL Server in use; percentage of SQL workload in the public Cloud; drivers to move SQL workload to the Cloud; advantages / disadvantages of going fully virtual with SQL Server, one instance with many different databases and applications vs one virtual machine with different instances for each application; migrating from an iSeries to SQL Server; changing the default SQL port and / or encrypting all traffic; protecting SQL injections through websites; best practices around MS licensing compliance; and solutions for long-term, database growth reporting / trending. 16 Pages (NV2423)

**MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed the top three business-facing projects initiated this year, metrics used to measure the performance of IT, improving IT vs the manufacturing lifecycle, the work environment for IT workers, Microsoft Compliance Manager for O365, introducing user profiles, dealing with passwords, determining support group when issues could be IT or OT, segmenting BT / IT and OT Networks, barcode scanners in a HighJump environment, solutions to track employees and visitors in facilities for emergencies, and CMMS / EAM solutions. 21 Pages (NV2421)

**DISASTER RECOVERY / BUSINESS CONTINUITY TRANSCRIPT** NOREX Members discussed organizational roles, responsibilities, and accountability for DR / BC; defined standards; having DR and BC sites on-prem, Cloud, or colocation; DRaaS vendors; backup solutions such as VEEAM, Acronis, and MS Azure; strategies for having both a DR and a BC site; replication software; Oracle; established reusable patterns; incorporating DR / BC plans in architecture reviews; app tiers / categories corresponding to implementation; meeting business requirements for resiliency and performance; and testing disaster recovery plans. 24 Pages (NV2418)

**ENERGY / UTILITY INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed IT budget trends, applications used to track compliance requirements, tools to analyze historical meter and weather data to determine the performance of behind-the-meter load control programs, leveraging collaboration tools (MS Teams / Slack) to work with 3rd parties, vendor partners, or stakeholders, use of MS Sentinel as both a SIEM and a SOAR, network tap monitoring tools like CyberX and Darktrace, Identity and Access Management initiatives, maintaining utility-owned communications equipment, partnering with outside Incident Response Services, and capabilities in the area of RPA / Automation. 22 Pages (NV2412)

**TALENT RECRUITMENT / MANAGEMENT / RETENTION TRANSCRIPT** NOREX Members discussed top-shelf benefits today's IT candidates expect, strategies implemented to retain current talent, challenges with

pushing IT employees to return to the office, available hybrid / work-from-home / in-office options, creating bonus programs, targeting and hiring talent that is a cultural fit and has the required skill set, measuring technical knowledge vs what is listed on a resume, questions candidates ask about the hiring organization, promoting employee engagement, and creating a team atmosphere when many employees continue to work remotely. 18 Pages (NV2411)

**HELP DESK / SERVICE DESK TRANSCRIPT** NOREX Members discussed outsourcing vs insourcing the Service Desk function, IT Service Providers, tracking and reporting key metrics / KPIs, response and resolution targets for Incident Ticket severity levels, the role of the individual answering incoming calls to the Help Desk, the structure of the Help Desk team, best practices for SLAs on Level 2 & Level 3 service requests, dealing with inappropriate escalations, Tier 1 staff engagement, training and professional development, VDI, and Self-Service. 32 Pages (NV2407)

**IAM: MANAGING IDENTITIES & PROVISIONING TRANSCRIPT** NOREX Members discussed lessons learned from implementing an IAM solution, the source of truth for employee information and identity, tools used on MFA privileged accounts, tools for account provisioning for Active Directory / Hybrid 365, IAM tools in use to manage user accounts, staff resources devoted to IAM, and Access Reviews / Certifications. 16 Pages (NV2405)

**TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed the shortage of drivers, issues with finding and retaining IT workers, addressing cybersecurity risk, types of digital investments being made, managing the 3G February / March sunset dates and asset tracking, implementing Snowflake for a data warehouse solution using Azure Data Factory for ELT / ETL, solutions for source control, data dictionary, glossary of terms while following DevOps best practices, and increased infrastructure and maintenance costs. 16 Pages (NV2403)

**SECURITY INITIATIVES FOR 2022 TRANSCRIPT** NOREX Members discussed the percentage of the IT budget directed to InfoSec, cyber insurance, top 3 security initiatives, implementing a governance framework for accepting risk, GRC tools, best practices to apply security patches on Windows OS, automating / outsourcing cybersecurity processes, MDR services and pen testing, successful tools to protect from malicious web links and sites, VPN requirements, EDR / AI scanners, security strategies, and providing security dashboards to company officers. 28 Pages (NV2401)

**HOSTED ERP SOLUTIONS TRANSCRIPT** NOREX Members discussed whether shifting to the Cloud is the right move when an organization is primarily on-prem, integrating Cloud applications with an ERP, utilizing Boomi as an integration Platform as a Service (iPaaS), value-add with an external PM to help push ERP implementation, security concerns with sensitive data on someone else's Cloud, using Microsoft Dynamics Business Central, Oracle R12.2.5 on-prem and moving to Oracle Cloud, and utilizing a Cloud-based ERP for operations in China / South Korea. 17 Pages (NV2398)

**PROJECT MANAGEMENT / PMO TRANSCRIPT** NOREX Members discussed the value a PMO returns to the business, the value of a PMO in a functional environment, introducing a PMO to an organization that is historically managed in silos, measuring success of a PMO for Agile Projects, the pros and cons of Waterfall vs. Agile, assigning projects, work intake process for smaller projects, tools to keep track of the lifecycle, documentation requirements for SDLC, the number of teams for ScrumMasters, and practicing Kanban. 23 Pages (NV2391)

**VENDOR MANAGEMENT TRANSCRIPT** NOREX Members discussed flexible pricing strategies, holding vendors accountable for service delivery, strategies for maintenance / support agreements, handling vendors and items to document, implementing an IT VMO, tools for vendor management and vendor scoring, and assessing the maturity of your VMO and strategic vendor relationships. 17 Pages (NV2390)

**SD-WAN TRANSCRIPT** NOREX Members discussed drivers to SD-WAN, reliability of their solution, negative experiences when implementing SD-WAN, recommendations for design and deployment, solutions evaluated for SD-WAN, utilizing providers with their own backbone vs. providers like CATO and Velo, access to all internet / Cloud services routed through NGFWaaS, and use of a managed service provider for SD-WAN. 22 Pages (NV2389)

**FOOD & BEVERAGE MANUFACTURING: IT SECURITY TRANSCRIPT** NOREX Members discussed recommended IT Security initiatives, cybersecurity insurance and renewals, segregation of the IT network, communication to the outside world from the OT network, solutions used for 2FA on VPN connections, Artic Wolf, Red Canary, and documented recovery and response plans. 15 Pages (NV2386)

**POST-COVID HYBRID WORK STRATEGIES TRANSCRIPT** NOREX Members discussed how best to manage a hybrid work environment, provisions for home offices, hardware support and budget, internet connectivity issues, cash allowances and potential legal concerns, achieving equity amongst in-office and at-home staff, best tools for building out conference rooms, and security. 30 Pages (NV2385)

**POWER BI TRANSCRIPT** NOREX Members discussed getting started with Power BI, experiences with building and executing, visualization services, mining capabilities, dashboard viewing, licensing agreements, backup and recovery strategies, deliverables, and alternative products. 15 Pages (NV2383)

**RANSOMWARE TRANSCRIPT** NOREX Members discussed Ransomware attacks and what to do once infected, restoring LAN shares and rebuilding workstations, warnings against paying ransom, counter measures and mitigation, backups and patching, cybercriminal activity detection, MDR vs. MSSP, endpoint protection, and the use of an MDM application. 30 Pages (NV2381)

**CONSTRUCTION INDUSTRY: IT PROJECT MANAGEMENT TRANSCRIPT** NOREX Members discussed how best to elevate the presence of IT project management in the Construction Industry, community of practice standardization, master service integrators, Construction Management software, credential harvesting, and security. 14 Pages (NV2375)

**SECURITY FRAMEWORKS TRANSCRIPT** NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

**GLOBAL IT ISSUES TRANSCRIPT** NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

**MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT** NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

**CLOUD-BASED STORAGE TRANSCRIPT** NOREX Members discussed the lessons learned, and difficulties experienced, when transitioning from on-prem storage to Cloud. The discussion covered the pros and cons of various Cloud platforms, security, policy and practices, and the dangers of accessibility. 17 Pages (NV2368)

**IT CHANGE MANAGEMENT TRANSCRIPT** NOREX members discuss IT Change Management processes including recommended tools, governance approaches and communication protocols during this April 2021 session. 25 Pages (NV2363)

**TELECOM / VOIP / TEAMS PHONE SYSTEMS TRANSCRIPT** A great March, 2021 discussion on telecom trends. Strategies and experiences moving to Teams (and others) for voice; softphones comparison; VoIP enhancements; and more. This transcript includes several polls and a lively chat session. 32 Pages (NV2361)

**RISK MANAGEMENT TRANSCRIPT** NOREX members share strategies for identifying, managing and reporting risks during this February 2021 session. 21 Pages (NV2358)

**SECURITY INITIATIVES FOR 2021 TRANSCRIPT** NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

**PLANNING FOR 2021 TRANSCRIPT** NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

**MULTI-FACTOR AUTHENTICATION, SINGLE SIGN-ON, AND PASSWORD MANAGEMENT**

**TRANSCRIPT** Members participate in a vigorous password management, SSO, and MFA discussion in December, 2020. Several products, links, polls, and experiences / strategies surrounding this important area of IT security are included. 21 Pages (NV2348)

**MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT** NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 WebForum. 20 Pages (NV2339)

**BI / DATA ANALYTICS TRANSCRIPT** NOREX Members discuss Business Intelligence and Analytics processes and tools during this August 2020 WebForum. 19 Pages (NV2337)

**REPLACING SKYPE FOR TEAMS / TEAMS TELEPHONY ISSUES TRANSCRIPT** NOREX Member organizations weigh in on the status of a move to Teams telephony from either an on-prem or Cloud Skype for Business solution and / or other vendor systems during this July 2020 session. 22 Pages (NV2330)

**AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT** NOREX Members discuss the usage of Microsoft, Amazon and Google Cloud services during this June 2020 WebForum. 20 Pages (NV2325)

**ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT** NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 WebForum. 20 Pages (NV2323)

**MICROSOFT TEAMS GOVERNANCE TRANSCRIPT** NOREX Members and guests share their experience, questions, and ideas on Microsoft Teams. This WebForum explored issues including best practices, migration, retention, managing groups, naming conventions, guest access, add-ins, and creation and archiving of teams. 49 Pages (NV2322)

**PATCH MANAGEMENT TRANSCRIPT** During this session, NOREX Members and guests discussed patch management automation, delays, tools, scheduling, solutions, and patch frequency. 16 Pages (NV2317)

**MICROSOFT TEAMS AND ALTERNATIVE SOLUTIONS TRANSCRIPT** Microsoft Teams and alternative solutions is a strong, growing area of interest for many NOREX Members. This discussion covers adoption and implementation, benefits and shortfalls, use of chat and collaboration, developing MS Teams governance, and more. Polls, links and an in-depth chat section is included in this February 2020 transcript. 32 Pages (NV2308)

**2020 IT SECURITY INITIATIVES TRANSCRIPT** What are member organizations top IT security initiatives for 2020? This January 2020 discussion is packed with security plans, strategies, polls, links to solutions / tools, a lively chat section, and much more. 27 Pages (NV2303)

**PROJECT MANAGEMENT / PMO TRANSCRIPT** NOREX Members share their project management / PMO experiences and solutions during this November 2019 WebForum. 17 Pages (NV2295)

**IT ASSET MANAGEMENT (ITAM) TRANSCRIPT** NOREX members discuss IT asset management strategies, implementation and tools and during this October 2019 session. 21 Pages (NV2294)

**MICROSOFT AZURE CLOUD SERVICES TRANSCRIPT** With Cloud-based solutions and services continuing to increase, members share their experiences with Microsoft Azure Cloud Services. In this October 2019 discussion, pros and cons, lessons learned; future plans; and more are shared. 12 Pages (NV2290)

**MICROSOFT TEAMS TRANSCRIPT** Microsoft Teams is gaining momentum for several NOREX organizations. While many are in the beginning stages, addressing Teams governance, retention concerns, managing access, general engagement, and more are discussed during this September, 2019 WebForum. 22 Pages (NV2287)

**O365 NEW FEATURES/ INITIATIVES TRANSCRIPT** Members share experiences with the implementation of various Microsoft Office 365 services and features including PowerBI, SharePoint, Skype for Business and Teams during this June 2019 WebForum. 32 Pages (NV2275)

**WINDOWS 10 TRANSCRIPT** Member organizations strategize and share the decisions they made when rolling out, supporting and managing the upgrades to Windows 10 during this January 2019 session. Several products are shared and polls taken. 17 Pages (NV2255)

**SELECT: SECURITY INCIDENT RESPONSE TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing an incident response plan; incident communication tips; tabletop exercise recommendations; usage of an incident response service provider; business continuity tool recommendations; post-breach activity; third-party security monitoring; and incident response playbooks. 13 Pages (NS243)

**SELECT: APPLICATION MANAGEMENT TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing a business application catalog; the use of ServiceNow; application tracking and data synchronization; automating processes; user education on the latest apps, tools, and features available for use; identifying a source of truth; asset management; and outsourcing asset management. 11 Pages (NS242)

**SELECT: BUSINESS RESILIENCY TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed business continuity vs business resiliency; business resiliency framework; escalating incident response to crisis management; value of business continuity to organization in post-COVID world; guiding principles regarding manufacturing autonomy and resiliency; hybrid / remote work affecting alternate site strategy; and storing DR documented processes / runbooks so they are easily accessed during an event. 15 Pages (NS240)

**SELECT: IT GOVERNANCE TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed initiating a governance process; the scope of IT Governance; defining IT Governance; decision makers and how decisions are made; establishing governance standards; IT Governance tools; Change Management considerations; maintaining process; and dealing with a less-rigid planning cycle. 13 Pages (NS238)

**SELECT: MICROSOFT 365 / TEAMS TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed Unified Communication strategy; operationalizing the rapid changes in M365; use cases for a Team vs a Channel; the Wiki app to provide a knowledge base of articles; integrating Records Retention Schedule (RRS) into MS Teams / SharePoint / OneDrive; workarounds used if MS Teams / SharePoint / OneDrive is unavailable; integrating Azure / Azure AD with M365; processes used to manage business requests to add Teams apps; managing access in the SharePoint site that comes automatically with a Team; and internal support structure implemented to support Teams / M365 within IT and / or the business. 13 Pages (NS234)

**QUICK POLL RESULTS: TECHNOLOGY AND BUDGET TRENDS 2019** Member organizations participated in our Technology & Budget Trends poll in December 2018. This poll includes deployment plans, technology plans, Cloud solutions, desktops/laptops, IT staffing/salaries, new technologies or applications implemented in 2018 and projects planned for 2019. 12 Pages (NP2252)

**GOVERNMENT: MS365 ADOPTION TRANSCRIPT** NOREX Members from Government agencies share strategies on the adoption of Microsoft's M365 licensing program during this October 2020 WebForum. 19 Pages (GSP100)

**IT TRENDS 2023 Q2** IT Trends is a collection of the NOREX Member input captured in the second quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 36 Pages (DT2023-2)

**IT TRENDS 2023 Q1** IT Trends is a collection of the NOREX Member input captured in the first quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 45 Pages (DT2023-1)

**IT TRENDS 2022 Q4** IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2022-4)

**IT TRENDS 2022 Q3** IT Trends is a collection of the NOREX Member input captured in the third quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2022-3)

**IT TRENDS 2022 Q2** IT Trends is a collection of the NOREX Member input captured in the second quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 43 Pages (DT2022-2)

**IT TRENDS: 2022 Q1** IT Trends is a collection of the NOREX Member input captured in the first quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2022-1)

**IT TRENDS: 2021 Q4** IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2021-4)

**IT TRENDS: 2021 Q3** IT Trends is a collection of the NOREX Member input captured in the third quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 59 Pages (DT2021-3)

**IT TRENDS: 2021 Q2** IT Trends is a collection of the NOREX Member input captured in the second quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 56 Pages (DT2021-2)

**IT TRENDS: 2021 Q1** IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2021-1)

**IT TRENDS: 2020 Q3 & Q4** IT Trends is a collection of the NOREX Member input captured in the third and fourth quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 74 Pages (DT2020-2)

**IT TRENDS: 2020 Q1 & Q2** IT Trends is a collection of the NOREX Member input captured in the first and second quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 62 Pages (DT2020-1)

**CIO: ALIGNING BUSINESS & TECHNOLOGY PLANNING TRANSCRIPT** NOREX Members discussed stakeholder involvement in planning; usage of a steering committee; technology roadmap tools; capability mapping; consultant involvement; organizational considerations; business-led ERP implementation; steps to achieve IT objectives; digital transformation and ChatGPT usage; cyber training for leadership; retaining staff; and transferring IT leadership. 17 Pages (CV083)

**CIO: IT BUDGETING & PLANNING FOR 2022 TRANSCRIPT** NOREX Members discussed projecting vendor price increases, cybersecurity goals aligning with legal and cyber insurance needs, percentage of IT budget to

overall budget, success stories to acquire more funding and staff, the cost to move to the Cloud, software, infrastructure, and platforms when moving to the Cloud, leveraging ARPA funding in 2022, mid-year reviews to analyze spending, determining the optimal size for an IT organization, critical-success criteria, and measuring productivity of software developers in an Agile Scrum environment. 24 Pages (CV078)

**CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT** Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

**CIO: IT'S ROLE IN BUSINESS SUCCESS TRANSCRIPT** Senior IT leaders share strategies for aligning IT with business objectives during this July 2020 WebForum. Topics include Cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)