

# Toolkit

The IT Peer Community. No Vendors. Ever.



## INFRASTRUCTURE

These NOREX Member-contributed documents include RFPs, policies, procedures, ITIL / ITSM, asset management, data center, server management, storage & retention, equipment disposal, and discussions. | TK004

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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](#).**

# Asset Management

**MEDIA DESTRUCTION** The following are practices for digital and paper media destruction. 2 Pages (20-1317)

**ASSET LIST TEMPLATE** This template provides a method for listing IT assets like office equipment, mobile devices, and software. 4 Pages (20-1279)

**ACQUISITION INFORMATION DUE DILIGENCE** The following describes pertinent information to be gathered on IT acquisitions. 2 Pages (20-1277)

**DEVICE AND MEDIA REUSE AND DISPOSAL** This outlines the reuse or disposal of encrypted hard drives on work devices. 1 Page (20-1237)

**SAM LIFECYCLE ANALYSIS** This analysis provides the results of a Software Asset Management survey, completed to help assess maturity in this space. 6 Pages (20-1211)

**SAM SURVEY** This Software Asset Management questionnaire reviews the current state processes for software and licenses from requisition to retirement. 3 Pages (20-1210)

**SAM RACI ROLES & RESPONSIBILITIES** These role definitions are part of a Software Applications Management (SAM) project. 4 Pages (20-1209)

**SAM PROJECT DASHBOARD & INVENTORY** As part of a Software Asset Management (SAM) project, applications were inventoried and a multi-year project was planned. 6 Pages (20-1208)

**EQUIPMENT AND SERVICES LIST** This spreadsheet describes equipment and services and lists quantity, item type, location, price, and other information. 6 Pages (20-1145)

**DISK WIPING** Effective methods for clearing and purging desktops and server drives are listed here. 2 Pages (20-1084)

**DATA DESTRUCTION POLICY** This document describes data destruction procedures as specified by NIST's three categories of data sanitization. 1 Page (20-1083)

**ASSET MANAGEMENT POLICY** This policy describes management of the acquisition, use, assignment, release, and disposal of IT assets. 3 Pages (20-1065)

**IT GENERAL ACCEPTABLE USE POLICY** This overarching policy provides a general outline of how corporate or personal IT assets are being used to carry out company business. 4 Pages (20-1043)

**CONFIGURATION MANAGEMENT HIGH-LEVEL DESIGN** This document provides a high-level or management view of the configuration management process. 17 Pages (20-1026)

**CONFIGURATION MANAGEMENT PROCESS CHARTER** This document provides an overview of the CMS process, goals, objectives, scope, benefits, key terms, roles, and responsibilities. 18 Pages (20-1025)

**WORK-FROM-HOME POLICY** Company policy regarding work-from-home asset tracking procedures is included in this statement template. 1 Page (20-909)

**COVID-19 ASSET TRACKING** This tracking guide provides policy on reporting which office assets have been brought to each employee's work-from-home office, including monitors, laptops, cables, and other items. 1 Page (20-908)

**ASSET NAMING STANDARDS** A method for PC, network, & server naming standards is given below. 2 Pages (20-699)

**SOFTWARE LICENSE TRACKER** This spreadsheet provides a template for managing your licenses with built-in coding and reminders. 2 Pages (20-646)

**INVENTORY MANAGEMENT PROCEDURE** This document establishes a process for the recording, identification, and accountability of all equipment having a predetermined minimum cost. 6 Pages (20-323)

**INFORMATION ASSET PROTECTION** The following is the procedure for requesting access to company systems and applications and their security. 11 Pages (20-042)

## **Business Process Management**

**PROCESS DESIGN HANDBOOK** A complete guide for creating a process design including key principles and timeline. 93 Pages (10-1658)

**BUSINESS PROCESS MODELING STANDARDS** This job aid provides guidelines, principles, and standards for all aspects of process modeling, document and design processes, activities, and workflows. 29 Pages (10-1657)

**BUSINESS PROCESS DESIGN EXCELLENCE CARD** The framework and hints, tips and traps for creating a business process design. 2 Pages (10-1656)

**PROCESS DOCUMENTATION GUIDE** This document will describe techniques and provide a process flow example and guidance on elements to be incorporated. 7 Pages (10-1655)

**PROCESS VALUE & HEALTH** This worksheet includes a process management value survey and health assessment. 6 Pages (10-1654)

**BUSINESS PROCESS TOOLS** These charts show important tools for business process improvement. 2 Pages (10-1653)

**PROCESS TOOLS & TECHNIQUES** This document provides a quick overview of the more commonly used process tools and techniques. 19 Pages (10-1652)

## **Data Center**

**FACILITY MOVE PROJECT TRACKER** All of the tasks involved in a full facility move are detailed in this sample template, including status, vendors, cost estimates, and other categories. 3 Pages (20-1192)

**FACILITY MOVE TIMELINE AND FAQ** This is a sample of an organization's facility move timeline, presented in calendar form, along with frequently asked questions about the move. 4 Pages (20-1191)

**DATA FLOW DIAGRAM** This chart shows the flow of data between customers, employees, workstations, mobile devices, and other areas. 1 Page (20-1128)

**IT FACILITY ACCESS** Described is a procedure for accessing the main office company data center and network closets. 3 Pages (20-870)

**IT INSTALLATION STANDARDS** This document serves as the basis to provide an easy to support, reliable, and consistent networking baseline consisting of cabling, component, and installation standards. 11 Pages (20-771)

**SERVER ROOM ACCESS & STORAGE COMPLIANCE** The server room provides enhanced reliability and security for IT components. This procedure describes access and storage limitations. 1 Page (20-765)

**SAMPLE DATA CENTER SOP** Standard Operating Procedure for a data center has many variations. Below is a sample SOP. 2 Pages (20-721)

**DATA CENTER SECURITY** This policy outlines Data Center rules and procedures. 5 Pages (20-643)

**MOVING A FACILITY** This diagram displays various components of a facility move. 1 Page (20-439)

**DATA CENTER QUESTIONNAIRE** This is a pre-assessment questionnaire that reviews the services of the data center as well as purpose, method, and frequency of the data center management's interaction with other groups / teams. 14 Pages (20-182)

**NETWORK WIRING CLOSETS** These are general requirements and planning points for network wiring closets. 1 Page (20-105)

**IT FACILITY DESIGN BRAINSTORMING** Following are some general ideas on design of an IT facility from one person's perspective on requirements. 2 Pages (20-070)

## Enterprise Architecture

**MICROSOFT FABRIC PROJECT CHARTER** Interested in replacing current data source architecture system, an organization investigates Microsoft Fabric with a Proof of Concept. 4 Pages (20-1322)

**ENTERPRISE SYSTEMS ROADMAP** This roadmap displays an organization's approach to software and system integration for different departments. 2 Pages (20-1305)

**ENTERPRISE SOLUTIONS ARCHITECT** Job description. 2 Pages (20-1273)

**EA SUCCESS BEST PRACTICES** This presentation explores the top 10 best practices you need to know to ensure Enterprise Architecture success. 14 Pages (50-386)

**ADOPTING CLOUD PRINCIPLES** At a recent NOREX event, this presentation was given to explore the shifting IT landscape and changes in Cloud strategies. 17 Pages (50-385)

**ENTERPRISE ARCHITECTURE METRICS** This document measures aspects of an EA practice to reduce initiative cycle times and to simplify the technology landscape. 5 Pages (20-951)

**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)

**SERVICE & BA REFERENCE MODELS** These drafts provide a framework for a Business Architecture & Service Reference Model. 2 Pages (20-103)

**PROCESS IMPROVEMENT IT ROADMAP** These charts show an overview of a phased approach of cybersecurity and process improvement over multiple years. 3 Pages (50-426)

**APPLICATION ASSESSMENT SUMMARY TEMPLATE** This heatmap describes applications, recommendations, costs, and rank. 1 Page (50-422)

**APPLICATION INTEGRATION QUESTIONNAIRE** This template is used for logging application lifecycles, tech stack currency, annual costs, stability, functionality, security, efficiency, and more. 10 Pages (50-421)

**APPLICATION ASSESSMENT REPORT TEMPLATE** This template shows the process of documenting an application assessment using a heatmap. 2 Pages (50-420)

**BUSINESS CAPABILITY PROCESS FUNCTION ROADMAP** These examples show the process flow of business capabilities and functions within employee management. 3 Pages (50-415)

**ENTERPRISE ARCHITECTURE ORG CHART** This example shows the hierarchy of an Enterprise Architecture team. 1 Page (50-413)

**EA COMPETENCY MATRIX** The strength of an Enterprise Architecture group can be measured using several metrics such as business, technology, strategy, security, and data management. 1 Page (50-383)

**PRINCIPLES OF ENTERPRISE ARCHITECTURE** This presentation explains how EA principles can guide decision-making and activity, and how to implement those principles. 8 Pages (50-361)

**ENTERPRISE APPLICATION FOOTPRINT** These sample EA slides show examples of current and projected SaaS landscapes of sales and marketing, procurement, supply chain, concept, and more. 2 Pages (50-360)

**BUILDING FEDERATED ENGAGEMENT IN YOUR EA PRACTICE** This copyrighted document, presented at a NOREX Workshop, is shared with permission from the author. It describes the processes involved with an Enterprise Architecture design, build, or refresh. 47 Pages (50-359)

**SAMPLE SCHEDULE ARCHITECTURE SERVICES** Sample Intelligent Business Process Management Suite (iBPMS), Robot Process Automation (RPA) Reference Architecture, and RPA SaaS workflows provide an outline of proposed services. 3 Pages (50-358)

**ROBOTIC PROCESS AUTOMATION ROADMAP** This presentation explores planning and implementing RPA processes and use cases, and discusses potential results. 38 Pages (50-357)

**ENTERPRISE ARCHITECTURE SERVICES** Planned and customer-initiated services are the two main types of services provided by the Enterprise Architecture team. 1 Page (50-356)

**SOFTWARE RISK ASSESSMENT SUMMARY** Using data from service overviews and assessments, a summary of software risk assessment is made, determining acceptable risk, concern, and red flags. 8 Pages (50-326)

**THIRD-PARTY TECHNICAL RISK ASSESSMENT** This software service questionnaire for third-party providers covers technical assessment, IT governance & development, architecture, security, and support. 7 Pages (50-325)

**SOFTWARE RISK ASSESSMENT INSTRUCTIONS** These instructions are for completing the technical risk assessment required for third-party product or service providers that host or maintain systems on behalf of the organization and have access to data. 2 Pages (50-324)

**ENTERPRISE ARCHITECTURE PRACTICE** Offered in this presentation is an EA vision and framework, principles and capabilities, processes, and standards. 40 Pages (50-309)

**AN ENTERPRISE ARCHITECTURE JOURNEY** At a recent NOREX event, a Member company shared its journey into Enterprise Architecture and what they've learned along the way. 18 Pages (50-307)

**EA DIGITAL TRANSFORMATION** Presented at a recent NOREX event, an organization's execution of their Enterprise Architecture business strategy is shared. 5 Pages (50-301)

**ENTERPRISE ARCHITECTURE CHARTER & OPERATING MODEL** The purpose of this Enterprise Architecture (EA) charter and operating model is to describe what EA means for the organization, how the EA practice will operate, and how success will be measured. 44 Pages (50-300)

**ROBOTIC PROCESS AUTOMATION** Discussed in this presentation is how the world of software robotics and augmented intelligence impacts virtually every area of business. 24 Pages (50-287)

**MODERNIZED BI & DATA ANALYTICS** This presentation shares business intelligence and data analytics vision, design, best practices, and key takeaways from a journey through this enterprise data solution. 23 Pages (50-286)

**ROADMAP PROCESS DEVELOPMENT** This presentation discusses Enterprise Architecture, setting technology standards, deliverables, developing and maintaining roadmaps, and designing information management. 44 Pages (50-253)

**ENTERPRISE DATA GOVERNANCE** This journey into Enterprise Data Governance as seen by an experienced NOREX member gives insight into resources and directives. 9 Pages (50-249)

**IT ENTERPRISE ARCHITECTURE & INNOVATION** The following presentation covers IT Enterprise Architecture and Innovation, including EQ discipline, innovation definition, and tools for culture change. 27 Pages (50-226)

**ENTERPRISE ARCHITECTURE TOP 5 INITIATIVES** This presentation covers the top five initiatives for an Enterprise Architecture plan. 29 Pages (50-225)

## Equipment / Hardware

**HARDWARE SPECIALIST** Job description. 2 Pages (20-1260)

**ELECTRONIC WASTE RECYCLING IFB** This invitation for bid is for a company-wide electronic waste recycling program. 23 Pages (20-1158)

**EQUIPMENT AUCTION FAQ & TIPS** Outdated or unneeded office equipment can be offered to employees through auctions. This document includes FAQ and tips about this process. 2 Pages (20-929)

**LAN SWITCH UPGRADE** This presentation offers recommendations and data regarding a Local Area Network upgrade. It compares the use of Avaya, Aruba, and Cisco systems. 19 Pages (20-686)

**RECORDS & INDEXING EQUIPMENT LIST** Computer systems and workstation equipment for scanning, printing, cashier stations and research are listed here. 3 Pages (20-608)

**PATCH CABLE ORDER FORM** This order form is for ordering cable for the equipment room, telecom closet, and data center. 1 Page (20-548)

**CERTIFICATE OF SALE TEMPLATE** The following is an example of a certificate of sale. 1 Page (20-545)

**CERTIFICATE OF DONATION TEMPLATE** This domain template can be tailored to fit your own certificate needs. 1 Page (20-544)

**ELECTRONIC EQUIPMENT DISPOSAL POLICY** This policy stipulates procedural practices for electronic equipment and software disposal. 3 Pages (20-532)

**COMPUTER EQUIPMENT BILL OF SALE** This is a template which can serve as a bill of sale between two parties buying and/or selling computer equipment. 1 Page (20-419)

**DESKTOP COMPUTING STANDARDS** Standard workstation equipment including monitors, keyboard, mice, printers, and software is listed for task-based and fixed function workers. 2 Pages (20-231)

## Firewalls

**HTTPS / SSL INSPECTION** This presentation provides information on recognizing when, why, and how inspection of HTTPS traffic should be done. 14 Pages (20-741)

**AUTOMATED SSL INSPECTION NOTICE** This is an example of a notification for a planned and automatic SSL encrypted data inspection. 1 Page (20-740)

**PCI REQUIREMENTS KEY** Payment Card Industry (PCI) requirements regarding security, development, and firewall/router configurations are outlined in this key. 19 Pages (20-281)

## Guides, Plans, and Presentations

**IT STRATEGIC AND TACTICAL PLAN** Plans for enhancing business engagement, improving IT maturity, governance, compliance, and disaster recovery and business continuity are detailed in this multi-year plan. 20 Pages (20-1320)

**ANALYTICS STRATEGY RECOMMENDATION** This document explores establishment of a data strategy, timeline, staffing models, and roles for data governance. 18 Pages (20-1319)

**ROADMAP TO USER STORY** This process roadmap shows units of development from an end user's standpoint. 1 Page (20-1313)

**IT STRATEGIC INITIATIVES** This chart displays IT initiatives and tactical projects as they relate to governance, engagement, DR / BC planning, and more. 1 Page (20-1308)

**MID-YEAR IT STRATEGY UPDATE** A mid-year assessment of priorities and progress, followed by a list of tactical initiatives. 8 Pages (20-1307)

**THREE-YEAR IT STRATEGIC PLAN** The plan is designed to enhance business engagement and stabilize and streamline systems and applications. 6 Pages (20-1306)

**DATA ARCHITECTURE PLAN PRESENTATION** This presentation demonstrates the necessity of DAP preferred management practices, information lifecycle, and expected benefits. 12 Pages (20-1288)

**DATA ARCHITECTURE PLAN** This plan is a set of rules, policies, and standards that govern and define the type of data collected and how it is used, stored, managed, and integrated. 20 Pages (20-1287)

**ERP DIVISION ORG CHART** This chart is a detailed outline of an Enterprise Resource Planning division. 1 Page (20-1244)

**IT LEADERSHIP** Given at a NOREX event, this presentation describes the importance of improving speed and flexibility as part of the IT leadership team. 27 Pages (20-1089)

**RELEASE MANAGEMENT PROCESS GUIDE** This document describes the release management process, guiding principles, and critical success factors. 28 Pages (20-847)

**RELEASE MANAGEMENT PROCESS PRINCIPLE GUIDE** Process principles describe and define the principles that drive the design of the overall process. 16 Pages (20-846)

**STRATEGIC TECHNOLOGY PLAN** The operations, infrastructure, applications, GIS, acquisitions, backup & recovery departments are all part of the following IT strategic technology plan. 7 Pages (20-631)

**PERFORMANCE MANAGEMENT HANDBOOK** This handbook illustrates the performance management cycle and the linkage of strategic planning, performance measurement, budgeting, performance review & plan revision. 53 Pages (20-549)

**SD-WAN DEVELOPMENT** At the 2018 NOREX International Roundtable, this presentation provided insight about the development of SD-WAN. 10 Pages (20-476)

**VISUAL STYLE GUIDE** This document is brought to you in its original form and has not been cleansed of personal information. This was done at the request of, and with permission from, the contributing organization. The style guide provides a comprehensive foundation of graphic standards for proper presentation of visual identity. 80 Pages (20-242)

**TECHNOLOGY RECOMMENDATION / DECISION TEMPLATE** The current state and evaluation of technology, business value, and investment summary are important components that must be explored in order to make a recommendation or decision on the future of technology in a business environment. 9 Pages (20-205)

**TECHNOLOGY STEERING TEAM CHARTER** A partnership between Information Technology and business leadership, the Technology Steering Team (TST) represents a critical component of the overall technology governance process. 7 Pages (20-204)

**IT STRATEGIC PLAN** This information Technology Strategic Plan provides the guidance and framework to achieve technology goals supporting a six-year business plan. 31 Pages (20-176)

**WEBSITE CONTENT GUIDE** Website technology, design, usability, portal, typography, and navigation are all topics that are outlined in this guide. 42 Pages (20-134)

**DEVOPS BENEFITS & CHALLENGES** At a recent NOREX event, a Member shared experiences regarding the benefits and challenges of modern application development with DevOps. 6 Pages (50-296)

**DATA GOVERNANCE FRAMEWORK** This document describes how a sound data governance program includes a governing committee, a defined set of procedures, and a plan to execute those procedures. 4 Pages (50-289)

**DEVOPS PROJECT SUMMARY & RECOMMENDATIONS** This initial step toward development of DevOps projects, when they would be useful, and using DevOps to invest in future efficiency. 9 Pages (50-266)

**BIG DATA & ANALYTICS** In this presentation from a NOREX Workshop, big data and analytics is explored. Discussed were initiative progress, future state, lessons learned, and a variety of big data programs. 15 Pages (50-248)

## **ITIL / ITSM**

**ITSM ADOPTION PROJECT** Presented here is an IT Service Management project described from process planning to deployment and governance. 18 Pages (20-866)

**IT SERVICE MANAGEMENT SOLUTION** A list of presentation points and scenarios were submitted for several vendors to address and / or demonstrate their ability to meet them. Following is the process of comparison and the final decision. 9 Pages (20-736)

**ITIL RUN BOOK** The basic configuration and operation support details of the Data Loss Prevention Program - Data Classification System are an information reference to perform a quick health check/monitor and perform basic tasks prior to escalating it to the relevant support person. 22 Pages (20-366)

**ITSM TOOL EVALUATION SCHEDULE** This template provides a timeline example for ITSM tool evaluation. 1 Page (50-374)

**ITSM TOOL EVALUATION** This workbook categorizes requirements for a replacement ITSM tool. Categories include security, storage & archiving, integration requirements, and service catalog. 63 Pages (50-250)

**OPERATIONALIZING ITSM** The role of the IT Service Management Office is presented with lessons learned regarding orchestration, ServiceNow, and ServiceNow Discovery. 12 Pages (50-244)



# Lifecycle Management

**SYSTEMS DEVELOPMENT LIFE CYCLE** This presentation describes phases of system and software development including Agile. 8 Pages (20-1119)

**IT FUNCTIONAL MAP** IT Department functions, goals, and processes are outlined in this chart. 1 Page (20-1030)

**LIFECYCLE MANAGEMENT PROCESS** This document includes the lifecycle of policy & procedures from creation and development to implementation. Includes a sample Business Policy template, sample Business Procedure template, and User Procedures template. 39 Pages (20-433)

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

**SDLC WITH FUNCTIONAL ROLES** This Systems Development Life Cycle (SDLC) describes the functional roles of Agile and Waterfall deliverables. 2 Pages (20-200)

**SOW: VULNERABILITY & PENETRATION TESTING** Vulnerability identification and analysis, physical security, authenticated and unauthenticated testing are examined in this SOW. 11 Pages (20-143)

**END-OF-LIFE SOFTWARE PROCESS** This document describes the process & procedures around identified end- of-life software installs. 6 Pages (20-026)

## Policies & Standards

**INFORMATION MANAGEMENT SOP** This document states company policy on how computer systems within an FDA regulated company are to be brought into service, changed, maintained, and retired. 10 Pages (20-868)

**DATA GOVERNANCE POLICY** This policy applies to all data, processes, and/or standards used within business units such as Human Resources, Sales, Operations, Purchasing, etc. 11 Pages (20-708)

**DATA CLASSIFICATION & PROTECTION STANDARDS** This matrix lists several types of records, what they consist of, and how they must be handled, listing classifications of Sensitive, Confidential, Privileged, and Vital. 26 Pages (20-594)

**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)

**COMPUTER USE AGREEMENT** The following is an agreement for the use of company equipment, tools, computers, handheld devices, or other property. 4 Pages (20-511)

**END USER COMPUTING & PRINTER POLICY** End user provisioning, asset security, roles, and responsibilities are defined in this policy. 5 Pages (20-510)

**FAXING POLICY & PROCEDURE** The transmission of Protected Health Information (PHI) by fax or e-Fax. 4 Pages (20-405)

**IDENTITY MANAGEMENT & ACCESS CONTROL POLICY** This policy establishes procedures controlling system access and defining the security management process for information technology resources. 4 Pages (20-402)

**WIRELESS CONFIGURATION STANDARD** The purpose of this standard is to define wireless configuration as it relates to the security management process for information technology resources. 2 Pages (20-400)

**WIRELESS CONFIGURATION POLICY** Wireless configuration as it relates to the security management process for Information Technology resources is defined here. 2 Pages (20-399)

**DESKTOP COMPUTING STANDARDS** Standard workstation equipment including monitors, keyboard, mice, printers, and software is listed for task-based and fixed function workers. 2 Pages (20-231)

**ACTIVE DIRECTORY MIGRATION TOOL** This document covers the workflow process for an Active Directory migration. 7 Pages (20-201)

## **RFP & Contracts**

**RFP: DATA CENTER STRATEGY** An organization is seeking recommendations and best practices from other facilities about revisions & realignment of technology as well as infrastructure of the data center. 12 Pages (20-645)

**RFQ: IT INFRASTRUCTURE ASSESSMENT** An IT Senior Leadership team is requesting quotes for an overall IT Infrastructure Assessment with a focus on operational excellence and high availability of Tier 1 systems. 3 Pages (20-644)

**RFP: INSTRUCTIONAL DEVICE PROCUREMENT** Proposals are solicited for vendors to provide instructional devices and related services for school districts and the education industry. 43 Pages (20-464)

**RFP: COMPUTER HARDWARE, SOFTWARE & SERVICE** An organization seeks a single vendor solution for computer hardware (computers, servers, and related hardware), software, and Microsoft Volume License Purchase Program and related services. 30 Pages (20-463)

**RFP: COMPUTERS & PERIPHERALS** This RFP is seeking computers and/or related computer peripherals or components with the best price/performance ratio and the ability to provide service and support for said equipment. 16 Pages (20-462)

**RFP: COMPUTER LEASE / PURCHASE** This RFP is mainly focused on the service aspects of hardware deployment and technology leasing for a university setting. 8 Pages (20-461)

**RFP: NETWORK FIREWALL & SECURITY APPLIANCE** A larger-scale network firewall & security appliance is needed to meet specific connection speeds, protection, filtering, and Ethernet interfaces. 5 Pages (20-379)

**RFP: ITSM** The goal of this RFP is to identify and select the correct system for replacement for the current Information Technology Service Management (ITSM). 50 Pages (20-118)

## **Server Management**

**IT SYSTEM MAINTENANCE** This is a procedure for maintaining activities for server, enterprise storage, and infrastructure systems. 5 Pages (20-872)

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

**SERVER ROOM ACCESS & STORAGE COMPLIANCE** The server room provides enhanced reliability and security for IT components. This procedure describes access and storage limitations. 1 Page (20-765)

**DNS NAMING STANDARDS** Naming standards for internal Domain Name Service (DNS) websites are exemplified here. 2 Pages (20-700)

**SERVER LIST BY TIER** This worksheet illustrates a method of listing servers, function, operating system, and other details. 4 Pages (20-680)

## Storage & Retention

**ASSET MANAGEMENT CHEAT SHEET** Documents specific to asset management are defined, along with the length of time that these documents are maintained. 5 Pages (20-1221)

**DOCUMENT MANAGEMENT SYSTEM GUIDE** These use guidelines will assist staff to store, share, and archive documents and records. 2 Pages (20-1220)

**RECORDS RETENTION PROGRAM** This is an example of a government organization's policy and procedure on retention of email and other company records. 12 Pages (20-1190)

**BACKUP POLICY** This policy explains a procedure for dataset backup schedules for Windows, Linux, VMDK VMware, Exchange, etc. 3 Pages (20-888)

**ENTERPRISE DATA BACKUP** A procedure for the data backup of Enterprise IT systems. 5 Pages (20-871)

**RECORDS RETENTION AND DISPOSITION** This policy is to ensure that all records, regardless of media, are managed throughout their entire lifecycle including final disposition. 7 Pages (20-749)

**RECORDS MANAGEMENT STANDARD** This standard provides direction regarding the retention and destruction of records, as also explained in related documents 20-707 and 20-708. 27 Pages (20-709)

**DATA STORAGE STANDARD** This storage standard expands on the principles outlined in Data Governance Policy (20-708) as they relate to data management, and provides guidance on the implementation and practical application of data storage solutions. 6 Pages (20-707)

**DATA BACKUP POLICY** This policy sets a consistent standard concerning the appropriate stewardship of digital data with respect to company requirements as well as obligations to state and federal laws. 9 Pages (20-559)

**INFORMATION CLASSIFICATION POLICY** Here is a system for classifying information resources according to the risks associated with storage, processing, transmission, and destruction. 5 Pages (20-531)

**DATA CLASSIFICATION WORKSHEET** Information class, type, systems, availability, integrity, and confidentiality level are examples of these data classification tools. 4 Pages (20-530)

**DATA BACKUP POLICY** This policy defines the security management process for information technology resources. 3 Pages (20-401)

**STORAGE VENDOR COMPARISON** This worksheet helps consumers track and compare storage vendors. 2 Pages (20-243)

**SYSTEM BACKUP AND RETENTION POLICIES: MEMBER PERSPECTIVES** Two members share their experiences and procedures on performing system backups and retention. 4 Pages (20-162)

**RECORD RETENTION, STORAGE, & DESTRUCTION** A process for management of records, their retention, storage, and destruction is designated in this document. 25 Pages (20-159)

**PROTECTED HEALTH INFORMATION DISPOSAL** This policy provides guidance as it relates to the appropriate disposal of protected health information and personally identifiable information. 2 Pages (20-157)

**DOCUMENT RETENTION / DESTRUCTION POLICY** The policy specifies regular periodic destruction of documents in electronic, print, or tape form. 2 Pages (50-273)

# Testing

**PURCHASE ORDER TEST SCRIPT** This sample test process module provides informative descriptions of purchase order processing scenarios & data requirements. 19 Pages (20-660)

**SALES ORDER PROCESSING MODULE** This sample test process module provides informative descriptions of sales order processing scenarios & data requirements. 6 Pages (20-659)

**PROCESS MANUFACTURING TEST SCRIPT** This sample test process module provides informative descriptions of process management scenarios & data requirements. 3 Pages (20-658)

**GENERAL LEDGER TEST SCRIPT** This sample test process module provides informative descriptions of general ledger scenarios & data requirements. 5 Pages (20-657)

**ACCOUNTS RECEIVABLE TEST SCRIPT** This sample test process module provides informative descriptions of accounts receivable scenarios & data requirements. 4 Pages (20-656)

**ACCOUNTS PAYABLE TEST SCRIPT** This sample test process module provides informative descriptions of accounts payable scenarios & data requirements. 7 Pages (20-655)

**REQUISITIONS TEST SCRIPT** This sample test process list provides informative descriptions of the requisition procedure. 2 Pages (20-654)

**TEST SCRIPT TEMPLATE** This template can be used for multiple test scenarios, and has a section listing test steps for data, conditions, financial checkpoints, and results. 3 Pages (20-653)

**SOW: TESTING** This template logs quality assurance COTS implementation, deliverables, and other aspects of testing. 1 Page (20-506)

**REQUIREMENTS TRACEABILITY MATRIX** Use this template to trace requirements to a test case, especially if testing is not housed in a testing tool. 2 Pages (20-505)

**TESTING SIGNOFF TEMPLATE** The following provides a format for recording results of project testing upon completion. 1 Page (20-501)

**TEST STRATEGY & USE CASE TEMPLATES** Project planning tools include this test strategy worksheet and a use case. 2 Pages (20-500)

**TEST PLAN TEMPLATE** This template is for any size project. Create for large, complex, high-risk, and/or high-visibility projects at the beginning of the project to ensure project team alignment & stakeholder approval. 6 Pages (20-499)

**TEST TRACKING TEMPLATE** This chart tracks pass/fail and defects when testing. 1 Page (20-497)

**MASTER TEST PLAN** The following is a template for a project master test plan, to outline the highlights of all the testing events that will take place during this project. 13 Pages (20-202)

**SOW: VULNERABILITY & PENETRATION TESTING** Vulnerability identification and analysis, physical security, authenticated and unauthenticated testing are examined in this SOW. 11 Pages (20-143)

**QUALITY CONTROL TEST PLAN** This is a test plan template for a Quality Control (QC) environment. 19 Pages (20-075)

**UAT: PPM** This worksheet template is designed for User Acceptance Testing (UAT) for project portfolio management. 17 Pages (50-373)

**UAT: CHANGE** This worksheet template is designed for User Acceptance Testing (UAT) for change management. 8 Pages (50-372)

## Transcripts & Polls

**BANKING / FINANCIAL INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed compliance issues; regulatory trends; onboarding / offboarding software; AI usage; AI / ML for enhanced customer service; Cloud usage; IT staffing trends; remote work trends; and the impact of AI on IT careers. 15 Pages (NV2503)

**DATA ENCRYPTION TRANSCRIPT** NOREX Members discussed data encryption pros and cons; implementations; encouraging the use of data encryption in the enterprise; standards; file sharing considerations; encryption in a hyperconverged environment; BitLocker recovery; tools; emerging technologies; encryption issues in China; and USB encryption. 14 Pages (NV2501)

**PROJECT MANAGEMENT TRANSCRIPT** NOREX Members discussed software tools; Azure DevOps; tools for IT vs the enterprise; MS Project; project queue visualization; scoring models; use of AI; MS Copilot; automating with Power BI; workflow approval; Teams for projects; success measurements; decommissioning projects; and lessons learned. 20 Pages (NV2499)

**MANAGING TECHNICAL DEBT TRANSCRIPT** NOREX Members discussed the definition of technical debt; problems that occur; cleaning up a ServiceNow database; upper-level support; cyber attack risks; strategies to remediate technical debt; budget considerations; security risks; project delivery considerations; and Cloud vs on-prem technical debt. 18 Pages (NV2496)

**CHANGE ENABLEMENT TRANSCRIPT** NOREX Members discussed the definition of change enablement; introducing to the organization; who drives the initiative or is it an organization-wide initiative; CAB considerations; project selection; leadership support; tips for improving processes; separating change and release; ERP transitions; retaining staff buy-in; project transparency; training resources; and change enablement metrics. 16 Pages (NV2494)

**RANSOMWARE TRANSCRIPT** NOREX Members discussed lessons learned; paying or not paying the ransom; ethical and legal considerations regarding payment; engaging outside assistance; ransomware plan vs cybersecurity plan, immutable backup; early detection; reporting an attack; security and vulnerability assessments; and cybersecurity insurance considerations. 16 Pages (NV2488)

**TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed cybersecurity practices and tools; automating cybersecurity processes; user training videos; Azure Sentinel; securing personal messenger apps; WhatsApp security considerations; vendor flow; deploying MFA for all types of access; applying security certificates; black box device security; predictive ETA tools; and capturing real-time vehicle data. 14 Pages (NV2486)

**SD-WAN TRANSCRIPT** NOREX Members discussed SD-WAN pros and cons; deployment; the complexity of SD-WAN; public vs private internet connections; backup strategies; cost considerations; quality-of-service experiences; firewall positioning; P2P traffic performance; VPN connections; vendor selection; Fortinet usage; Cisco vs Meraki; utilizing multiple vendor solutions; Palo Alto; managed services options; SASE; WAN acceleration; and Always On VPN. 19 Pages (NV2483)

**MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed aligning IT with manufacturing processes; the “walkabout” model; implementing an enterprise-wide approach; network segmentation strategies; patching floor systems; Manufacturing Execution Systems (MES); ERP integration with manufacturing processes; authentication for frontline workers; Microsoft Dynamics; and dedicated operational technology. 18 Pages (NV2482)

**MANAGING SHADOW IT TRANSCRIPT** NOREX Members discussed the impact of shadow IT on an organization; who is most responsible for shadow IT; root causes; controls tied to the CMDB; innovation and control; tools to gain visibility to SaaS being used; the risk of shadow IT; and consumer-focused tools. 17 Pages (NV2481)

**MERGERS & ACQUISITIONS TRANSCRIPT** NOREX Members discussed merger and acquisition experiences and recommendations; acquiring executive consideration for technical issues; M&A planning; managing due diligence; identity federation; migrating Active Directory and Microsoft Forms; platform and cross-platform migration tools; ERP migration; domain access; management software / discovery tools to inventory IT asset inventories; and enterprise reporting platforms. 16 Pages (NV2473)

**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)

**ANTIVIRUS & FIREWALLS TRANSCRIPT** NOREX Members discussed antivirus and firewall vendors; Mimecast and Artic Wolf; FortiGate; Azure site recovery; handling endpoint protection and leveraging both an endpoint protection platform and endpoint detection and response solution; host-based firewalls; firewalls in HA mode; how SDN networking usage affects firewall controls; methods used in exercising granular control over traffic exceptions; Azure firewalls; moving from SonicWall to FortiGate; and alternatives for Palo Alto firewalls, MS Defender antivirus, and Proofpoint email filtering. 17 Pages (NV2466)

**ENERGY / UTILITY INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed budget trends; technology and innovation challenges; effective collaboration and communication between IT and OT; Cloud solutions for CIP data / workloads and auditing concerns; SaaS and Cloud options for major applications; and ServiceNow on-prem and other tools. 15 Pages (NV2465)

**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)

**MOBILE DEVICE MANAGEMENT TRANSCRIPT** NOREX Members discussed business control of BYOD if used for company resources; best practices for maintaining data access on mobile devices in a BYOD environment; mobile admins handling of outside salespeople; Apple IDs and iCloud backups; popularity of native apps; recommended MDM products and vendors; and MDM solutions currently in use. 14 Pages (NV2462)

**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)

**ENDPOINT DETECTION & RESPONSE TRANSCRIPT** NOREX Members discussed forcing endpoint health checks; running Windows Defender alongside other EDR products; managing vulnerabilities with Windows 7 and XP machines; monitoring log entries / activities to detect someone roaming the network; choosing an EDR tool; moving from Palo XDR to the Microsoft solution; using Torri, Zluri, or Productive for SaaS discovery; and CrowdStrike vs SentinelOne. 14 Pages (NV2458)

**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)

**BACKUP / RECOVERY TRANSCRIPT** NOREX Members discussed tools used for backup / recovery; issues getting Veeam backups on tape; backing up to the Cloud; cost savings backing up to the Cloud; backup strategies; software / hardware for Linux Ubuntu servers; securing backups from ransomware attacks; testing recovery environments after daily backup; people responsible for overseeing backup / recovery; use of an MSP to perform backups; Recovery Point Objective (RPO) and Recovery Time Objective (RTO); cyber recovery / vault to protect against ransomware; and exercising / updating the cyberattack incident playbook. 17 Pages (NV2453)

**AGILE / DEVOPS TRANSCRIPT** NOREX Members discussed a framework to advance the transition from a Waterfall to Agile mentality; strategies to grow Agile maturity within an organization; moving support and product management to a Agile / Scrum-based model; best practices for managing Agile projects that impact multiple applications; rolling out a DevOps initiative; and migrating from Azure DevOps on-prem to Azure DevOps in the Cloud. 12 Pages (NV2452)

**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)

**NETWORK MANAGEMENT TRANSCRIPT** NOREX Members discussed Network Management challenges and trends for 2023; utilizing a partner to monitor and manage infrastructure; internal Network Operations Center (NOC) and the KPIs leveraged to communicate NOC performance; network services metrics generated on the

network systems and services; network performance and diagnostic products in use; utilizing a SEIM and whether it is managed internally or by a third party; Remote Syslog and iLO preferred to DRAC; best practices for network file sharing outside the organizations and maintaining consistent security for individual user OneDrive file sharing. 20 Pages (NV2445)

**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)

**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)

**RUSSIA-UKRAINE IMPACT ON CYBERSECURITY TRANSCRIPT** NOREX Members discussed trusting the resiliency of government and infrastructure security, increase in security metrics due to the war, measuring the risk impact of this event, determining dependencies and risks with overseas vendors, important steps of system hardening, email security vendors, utilizing threat intelligence effectively, preparing executives for worst-case scenarios, Honeypot as a security measure, supply chain attacks, securing Operational Technology environments, and the evaluation and address of risks from ransomware. 22 Pages (NV2410)

**CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT** NOREX Members discussed PMO for IT, challenges with finding and retaining IT talent, internal vs outsourced onsite technical support, 5G connectivity, equipment used besides individual phones / tablets, WebDAV, WordPress for intranet, utilizing interactive, large-format displays such as the Dell 55" on jobsites, and security cameras used onsite. 21 Pages (NV2408)

**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)

**NETWORK MANAGEMENT / MONITORING / REFRESHES TRANSCRIPT** NOREX Members discussed network management trends for 2022, the frequency to push out configuration changes, improvements to network monitoring to increase cybersecurity, partnering to monitor and manage infrastructure monitoring, network performance and diagnostic products in use, toolsets used to assess and monitor network capacity, network monitoring solutions for remote access, open source network management solutions, KRI / KPI metrics, and migrating business applications and data to a hybrid Cloud environment. 21 Pages (NV2404)

**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)

**MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT** NOREX Members discussed struggles setting up users with MFA, conditional access policies, minimizing the impact to registration of the users before enabling 2FA / MFA, experiences implementing Duo 2FA, passwordless MFA configured through Microsoft Azure, integrating with Remote Desktop Connection to servers and / or Terminal Server, MFA products for remote access to network (VPN / RDP) and local login, adopting Single Sign-On for 3rd-party accounts, and pain points with implementing OKTA for MFA and SSO. 19 Pages (NV2396)

**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 Scrum Masters, 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)

**ENTERPRISE ARCHITECTURE TRANSCRIPT** NOREX Members discussed key areas of opportunity for EA, how EA addresses internal vs external business capabilities, EA's role to contribute to current and future business financial performance, tracking metrics and measuring performance, citizen development, and advertising EA specific services across the organization. 24 Pages (NV2387)

**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)

**RPA / AI / ML TRANSCRIPT** NOREX Members discussed RPA / AI / ML and value realized, best use cases, machine learning, training, citizen developers, using AI to boost business, RPA vendors, tools, and programming and locking down bots. 21 Pages (NV2382)

**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)

**HYPERCONVERGED INFRASTRUCTURE TRANSCRIPT** NOREX members share experiences adopting a Hyperconverged Infrastructure including performance expectations, vendor options, and back-up strategies during this April 2021 Session. 16 Pages (NV2365)

**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)

**ENTERPRISE STORAGE SOLUTIONS TRANSCRIPT** Member organizations discuss a variety of enterprise storage technology, trends, vendor solutions, and more during this March 2021 Session. Several polls are

included. 24 Pages (NV2362)

**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)

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

**HYBRID AND MULTI-CLOUD ENVIRONMENTS TRANSCRIPT** Members compare notes and experiences with both Multi-Cloud and Hybrid Cloud environments during this August, 2020 Session. Use cases for different cloud providers, tools, and strategies are discussed. 17 Pages (NV2338)

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

**CYBERSECURITY TRANSCRIPT** NOREX Members share cybersecurity best practices and tool recommendations during this July 2020 Session. 19 Pages (NV2331)

**AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT** NOREX Members discuss the usage of Microsoft, Amazon and Google cloud services during this June 2020 Session. 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 Session. 20 Pages (NV2323)

**CLOUD FIRST APPROACH / STRATEGY TRANSCRIPT** From key factors that drive usage to the cloud, adoption, moving existing applications, security measures, agnostic vs. native, the cloud Center of Excellence, and more are covered in this April, 2020 discussion. Polls and member chats are included. 28 Pages (NV2316)

**PCI TRANSCRIPT** Members take a fresh look at all regulation, protection, and processes required to meet PCI data security standards (DSS) during this March, 2020 Session. 13 Pages (NV2314)

**CHANGE MANAGEMENT TRANSCRIPT** NOREX hosted this Change Management discussion in March, 2020 with 60+ Members discussing new change management practices and trends as many embrace agile, lean, digital adoption and more. 17 Pages (NV2311)

**ENDPOINT DETECTION, PREVENTION TRANSCRIPT** Member organizations discuss Endpoint Detection / Prevention / Response during this March, 2020 Session. Several polls and a variety of products / solutions in use are included. 19 Pages (NV2310)

**VDI TRANSCRIPT** NOREX Members discuss the selection, implementation and operation of various Virtual Desktop Infrastructure platforms during this February 2020 Session. 16 Pages (NV2306)

**SD-WAN TRANSCRIPT** NOREX Members discuss the reasons they have moved forward or are considering the benefits of SD-WAN technologies during this January 2020 Session. 14 Pages (NV2304)

**PATCH MANAGEMENT TRANSCRIPT** NOREX Members share their patching schedules for routine and critical system patching and discuss tools used for applying patches during this November 2019 Session. 15 Pages (NV2298)

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

**ENTERPRISE STORAGE SOLUTIONS TRANSCRIPT** NOREX members discuss current storage trends including usage of flash, cloud options, modern data protection, automation and artificial intelligence during this September 2019 Session. 10 Pages (NV2289)

**PRIVILEGED ACCESS MANAGEMENT TRANSCRIPT** NOREX members discuss the implementation and of Privileged Access Management procedures and tools during this July 2019 Session. 14 Pages (NV2278)

**HYPER CONVERGED INFRASTRUCTURE TRANSCRIPT** NOREX members discuss pros and cons of Hyper converged infrastructure, scale computing and implementation experiences during this June 2019 session. 11 Pages (NV2276)

**BUSINESS INTELLIGENCE TRANSCRIPT** Members share recommendations on starting a BI practice and experiences with various BI tools during this June 2019 Session. 21 Pages (NV2274)

**NETWORK PERFORMANCE AND CAPACITY PLANNING TRANSCRIPT** Members discuss strategies for improving network performance with an emphasis on proprietary and open source monitoring tools during this April 2019 Session. 21 Pages (NV2265)

**DIGITAL ASSET MANAGEMENT TRANSCRIPT** NOREX members discuss digital asset management strategies, roadmaps and tools during this February 2019 session. 11 Pages (NV2257)

**CLOUD-BASED STORAGE TRANSCRIPT** NOREX members discuss the pros and cons of moving from on-prem to cloud-based storage during this January 2019 session. 16 Pages (NV2254)

**SELECT: SERVICENOW TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed module usage; managing and communicating features and releases; staffing requirements; customization impact; requests requiring multiple organizational pillars; APM considerations; CMDDB and CSDM interaction; usage of Automated Test Framework; Release Management Module; use of the employee portal; integration with Microsoft Teams; data extraction tips; usage of archive function; incident response functionality; backup options; ServiceNow Impact Squad; and citizen development implementation. 19 Pages (NS253)

**SELECT: RISK & VULNERABILITY MANAGEMENT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed including SLAs in a strategic approach; prioritizing vulnerabilities; tracking tools; identifying shadow IT; measuring program effectiveness; internal communication; emerging threats; and communicating risk to senior management. 12 Pages (NS250)

**SELECT: DATA ANALYTICS TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed Cloud-based analytics tools; implementing Microsoft tools; centralized vs federated analytics; self-service analytics; impact of AI; dedicated data engineers; data governance; executive support; and visualization tools. 15 Pages (NS248)

**SELECT: MANAGING TECHNICAL DEBT TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed the definition, management, and communication of technical debt; how to identify, surface, and prioritize TD; risk as an assessment; using employee retention as leverage; management in the Cloud vs on-prem; IT in the enterprise hierarchy; and balancing TD and product development. 15 Pages (NS247)

**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: 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: ENTERPRISE ARCHITECTURE TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed top priorities for your Enterprise Architecture team in 2023; recommendations on maturing a “new” EA team; EA team as centralized, decentralized or a hybrid of both; EA groups providing value to Agile development groups; effective training methods for a new EA team; techniques to assess cybersecurity for an architecture; evolution of Zero Trust concepts and data governance; and value from an investment in an EA tool. 18 Pages (NS237)

**SELECT: AGILE / DEVOPS TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed future organizational growth of Agile / DevOps; organizational changes necessary to ensure DevOps success; DevOps success with development lifecycle outside of SDLC and projects with a hybrid approach; implementation of DevOps in organizational silos; setting up DevOps teams and assigning responsibilities; security requirements in the DevOps process – integrated or considered +1; economies of scale; lessons learned adopting a DevOps culture; and transitioning from Waterfall projects to Agile. 14 Pages (NS236)

**SELECT: SERVICENOW CMDB TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed CMDB licenses and application recognition; how detailed a CMDB can get; challenges navigated on CMDB practices and implemented capabilities that rely on CMDB data cleanliness; tips to set up Multisource CMDB; experiences with interfacing / integrating external CMDBs or external discovery tools; automatic import capabilities from other sources like Microsoft Active Directory or Microsoft System Center Configuration Manager; successfully implementing a true CMDB with relationships between CIs; master data strategy for end-to-end integration across CMDB, Incident Response Management, EA tools, and PMO tools; assigning capabilities to applications or services; and how deep in the CSDM model you define information. 18 Pages (NS235)

**SELECT: SERVICENOW TRANSCRIPT** NOREX Select Members from Fortune / Forbes 1000 organizations discussed achieving primary value drivers for a ServiceNow implementation, organization structure, implementation timelines, SAM Pro module, managing services in SNOW, ServiceNow enabling other IT capabilities and systems such as CMDB, and CAB workbench to run a CAB meeting. 18 Pages (NS213)

**QUICK POLL RESULTS: ELECTRONIC COMMUNICATION RETENTION** In April 2021, 103 NOREX Member organizations responded to a poll regarding electronic communication retention. Questions were based on standard retention policies for email, instant messaging / chat, text messaging, video / audio recording, and also included retention tools being used. 2 Pages (NP2370)

**QUICK POLL RESULTS: TECHNOLOGY & 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 Session. 19 Pages (GSP100)

**IT TRENDS 2023 Q4** IT Trends is a collection of the NOREX Member input captured in the fourth 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. 25 Pages (DT2023-4)

**IT TRENDS 2023 Q3** IT Trends is a collection of the NOREX Member input captured in the third 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. 22 Pages (DT2023-3)

**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: IT BUDGETING / PLANNING FOR 2024 TRANSCRIPT** NOREX Members discussed top spending priorities for 2024; forecasting IT costs; identifying areas for capability growth; IT budget as a percentage of revenue; IT budget by industry; percentage of budget spent on cybersecurity and infrastructure; chargeback models; and integrating AI into IT strategy. 16 Pages (CV084)

**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 Session. Topics include cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)