Toolkit

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PROCUREMENT

These NOREX Member-contributed documents include contracts, agreements, SLA, non-disclosure agreement, SOW, RFI, RFQ, RFP, vendor management, vendor comparison, vendor scorecards and requirements, pricing, leasing, mergers, acquisitions, and discussions. | TK012

TO REQUEST A DOCUMENT FROM THIS TOOLKIT, NOTE THE TITLE / NUMBER AND ADD THEM TO THE COMMENTS AREA ON THE REQUEST FORM HERE.

Contracts & Agreements

PCI VENDOR AGREEMENT Following is an example of an agreement between an organization and a third-party vendor of Payment Card Industry (PCI) services. (20-1390)

SAMPLE MASTER SERVICES AGREEMENT This MSA template can be customized to any services agreement needed for your organization. 10 Pages (20-1353)

PURCHASE REQUISITION FORM This form is for requesting projects and solutions, and describes known vendors, business value, and possible risks. 2 Pages (20-1245)

CONTRACT FOR BODY-WORN CAMERAS This contract lists terms and conditions for an agreement between a city and vendor for body-worn cameras. 31 Pages (20-1169)

NEW PRODUCT PURCHASE REQUEST This request begins the process of purchasing a new technology product like hardware, software, or services. 2 Pages (20-1157)

SOFTWARE SUPPORT AGREEMENT This agreement describes the terms of software maintenance and technical support services. 4 Pages (20-1053)

MASTER IT ACQUISITION PLAN This spreadsheet contains IT Purchase Plans and lists approved, hold, withdrawn, or denied status. 10 Pages (20-1004)

CLOUD PROVISIONS General and special provisions for Cloud computing are provided in this detailed contract. 22 Pages (20-1003)

CLOUD CONTRACT CHECKLIST The following checklist contains key points, when fully developed, the Statement of Work (SOW) can then be drafted. Definition of terms is located at the conclusion of this checklist. 9 Pages (20-1002)

CLOUD CONTRACT TEMPLATE This template provides a basis for contracting a Cloud computing service for SaaS, PaaS, or IaaS services. 4 Pages (20-1001)

DATA RECOVERY LANGUAGE This language is used for data recovery when an agreement is terminated with a vendor. 1 Page (20-1000)

CONSULTING AGREEMENT This is an example of an agreement between an organization and a company being hired to perform a service. It also includes a Statement of Work. 10 Pages (20-773)

SOFTWARE CONTRACT CLAUSES These pages provide examples of software contract clauses regarding financial services & source code escrow for licensed products. 2 Pages (20-663)

IT CONTRACT LANGUAGE The following are language & wording suggestions for IT contracts for Institutions of Public Higher Education (IPHE). 3 Pages (20-661)

SAAS SUBSCRIPTION AGREEMENT This agreement sets forth the terms and conditions on which a vendor provides the functionality made available via Internet software. 8 Pages (20-629)

INSURANCE REQUIREMENTS Following are examples of insurance requirements when two or more organizations are engaged in contracted services. 5 Pages (20-541)

MEMO OF UNDERSTANDING TEMPLATE This template can be personalized for any business agreement between two or more parties. 4 Pages (20-536)

MASTER SERVICES AGREEMENT This serves as a template for an agreement between an organization and a service provider, determining statement of work, fees, time and materials, and other details. 14 Pages (20-535)

SECURITY CONTRACT LANGUAGE The following document describes language frequently used in the development of security contracts. Topics include encryption, authentication, compliance, auditing, personal data, and requirements. 4 Pages (20-508)

VENDOR AGREEMENT STANDARDS Following are basic vendor agreement standards concerning indemnity protection, limitations of liability, consequential damages exclusions, warranties, and more. 2 Pages (20-495)

ACCEPTABLE USE ANNUAL CONTRACT This agreement is about the acceptable use and confidentiality of company Information Technology assets, computers, networks, systems, and data. 2 Pages (20-318)

SaaS CONTRACT REVIEWS A presentation delivered during a NOREX session shows SaaS volume, deal breakers, must-haves, and more. 6 Pages (20-259)

COPIER/PRINTER LEASE AGREEMENT The following are components of a service agreement for leased copier and/or printer equipment. 5 Pages (20-146)

DATA SHARING AGREEMENT The following data sharing agreement template is HIPAA compliant. 3 Pages (20-086)

HIPAA BUSINESS ASSOCIATE AGREEMENT This agreement template is between an organization and a HIPAA compliant organization. 7 Pages (20-085)

SAMPLE PENSION ANALYSIS CONTRACT This contract identifies, decomposes and re-designs selected current and future business processes to create efficiencies using technology. 27 Pages (20-011)

COMPANY APP TERMS OF USE All content, information, and services provided on and through the organization's app may be used only under the following terms and conditions. 11 Pages (50-263)

LIMITATION OF LIABILITY These are samples of what one organization has used for wording a Limitation of Liability clause for technology contracts. 1 Page (50-255)

Merger & Acquisition

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

MERGER AND ACQUISITION IT PLAYBOOK This questionnaire helps gather information on networks, phone systems, IT applications, email, vendor, and staff information. 11 Pages (20-1275)

CONCEPTUAL SEPARATION APPROACH This document describes the approach to separation of company IT applications and support up to the completion and exit of all IT service agreements. 17 Pages (20-1274)

ACQUISITIONS LIST This is a list of typical components of an organization's acquisitions for use in planning and documentation. 2 Pages (20-1271)

ACQUISITION ON-SITE PLAYLIST This document explores the procedures needed for discovery, installation, troubleshooting, documentation, and retirement of equipment and systems. 2 Pages (20-1270)

MERGER & ACQUISITION QUESTIONNAIRE This worksheet provides an example of the questionnaire used for a particular merger / acquisition size. 11 Pages (20-729)

MERGER PROJECT PLAN Discovery and planning phases of a project are outlined in this merger plan. 1 Page (20-455)

NEW COMPANY PROJECT PLAN Included are suggested processes for documenting information and setup after acquiring a new company. 4 Pages (50-423)

Non-Disclosure & Confidentiality Agreements

SOLE SOURCE PROCUREMENT REQUEST This template outlines the process for request of a sole source purchase for software or services. 3 Pages (20-1156)

CONFIDENTIALITY AGREEMENT Confidential information is defined, and terms, restrictions, and exceptions to confidentiality are expressed in this agreement. 3 Pages (20-772)

GRAMM LEACH BLILEY ACT SECURITY PROGRAM This describes safeguards implemented to protect covered data and information in compliance with the FTC's Safeguards Rule of the Gramm Leach Bliley Act (GLBA). 4 Pages (20-764)

THIRD PARTY LIMITED ACCESS AGREEMENT This Agreement outlines specific responsibilities that relate to vendor access to any company data that may be stored within software or on the server. 5 Pages (20-760)

GRAMM-LEACH-BLILEY AGREEMENT ADDENDUM The Gramm-Leach-Bliley Act, or Financial Modernization Act, requires that financial institutions must explain how they share & protect customers' private information. This addendum provides further information on carrying out this requirement. 2 Pages (20-662)

PROVIDER CONFIDENTIALITY & SECURITY AGREEMENT This agreement applies to any provider party who is on site or who requires access to the company network. 2 Pages (20-539)

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

PRIVILEGED ACCESS AGREEMENT This agreement includes acknowledgement of responsibilities, necessary clearances, and authorization for privileged access to systems. A non-disclosure certificate is also included. 3 Pages (20-362)

NON-DISCLOSURE AGREEMENT A non-disclosure agreement template that can be modified for your use. 3 Pages (20-094)

CONTRACTOR DATA INTEGRITY / CONFIDENTIALITY This is an agreement template between an organization and services contractor. 1 Page (20-087)

CONFIDENTIALITY AGREEMENT This agreement template outlines the intent of both parties in regard to the protection of information. 2 Pages (20-084)

ACCEPTABLE USE / CONFIDENTIALITY This agreement describes the standard policy of the use of company Information Technology resources and data contained therein. 5 Pages (20-043)

Pricing

VITAL RECORDS PRICING This document is an example of how to record cost & pricing for various vital records systems and filing. 1 Page (20-607)

COST PROPOSAL WORKSHEET Pricing in this cost proposal reflects the requirements for a claims management software RFP. 4 Pages (20-223)

COST PROPOSAL EVALUATION These worksheets provide a way to record and compare scores from cost proposal evaluations. 4 Pages (20-128)

RFI

RFI: ENTERPRISE IAM This RFI explores making a move to a consistent platform across the board to standardize levels of maturity, modernize IAM solutions, and close gaps. 9 Pages (50-376)

RFI: PRIVILEGED ACCESS MANAGEMENT This example RFI focuses on evaluating identity & access management tools as a potential replacement for the current set of tools. 5 Pages (50-375)

VENDOR PROGRAM QUESTIONNAIRE This template questions vendors on their interoperability standards, performance guarantee, implementation, support, and training. 19 Pages (50-351)

RFI: INFORMATION SECURITY RISK ASSESSMENT Requested here is a privacy and security risk assessment pursuant to the Health Insurance and Portability Accountability Act (HIPAA). 18 Pages (20-573)

RFI: PRODUCER INFORMATION MANAGEMENT This document is to request information on a product information management / product master data management solution. 11 Pages (20-387)

RFI: CUSTOMER SERVICE MANAGEMENT This Request for Information is to solicit suggestions, ideas, or potential Information Services Customer Service Management (ISCSM) approaches on a non-competitive and non-binding basis. 19 Pages (20-314)

RFI: RECORDS MANAGEMENT SYSTEM A department is seeking information from vendors that can provide an operationally proven web-based Commercial Off-The-Shelf (COTS) software law enforcement application framework to replace, among other functions, internally developed Records Management System. 32 Pages (20-163)

RFI: EVENT MANAGEMENT SOFTWARE SOLUTION This Request for Information is for those in the process of identifying Event Management Software vendors for an upcoming requirement. 5 Pages (20-095)

RFI: WEBSITE REDESIGN A company is soliciting capabilities information and cost parameters from solution providers regarding the design, development, implementation and hosting of the company website. 6 Pages (20-056)

RFP

RFP: PENETRATION TESTING This Request for Proposal (RFP) invites prospective vendors to submit a proposal to perform and deliver security penetration testing. 8 Pages (20-1290)

RFP: LEARNING MANAGEMENT SYSTEM This RFP for a Learning Management System (LMS) asks for pre- and post-skills assessments for performance development and training schedule plans. 9 Pages (20-1195)

GENERIC RFP TEMPLATE This template provides an outline of what to include in your Request for Proposal. 5 Pages (20-1189)

RFP: BODY-WORN CAMERAS This request document is for provision of body-worn cameras, a user and administrative interface, and a video storage system. 32 Pages (20-1166)

RFP: PHONE SYSTEM UPGRADE This example RFP invites proposals to provide phone system upgrade and replacement. 19 Pages (20-1108)

WAN SERVICES QUESTIONNAIRE This group of sample questions refers to an RFP for provision of wide area network services. 2 Pages (20-1107)

RFP: WAN SERVICES An organization is seeking a comprehensive solution with an innovative, market-leading vendor of wide area network services. 19 Pages (20-1106)

RFP: TELEPHONY SERVICES This RFP helps identify and select the most appropriate business partner for telecommunications services. 10 Pages (20-1101)

RFP: REMOTE TIER 1 HELP DESK This RFP is for outsourcing of a provider of support services to users of corporate PCs, laptops, and other devices. 7 Pages (20-1047)

IT RFP This Request for Proposal is for design and development services for tools with a password vault for all staff within the organization. 2 Pages (20-1005)

RFP: CLOUD COMPUTING PROVISIONING SERVICES This document solicits proposals for a cloud-based solution for optimal architecture, security, performance, and strategic vision. 17 Pages (20-881)

RFP: TALENT MANAGEMENT SYSTEM An organization is looking for a system focused on performance management, professional development, and succession planning for team growth. 27 Pages (20-869)

RFP: INTERNET SERVICES This RFP will assist in selecting a qualified service provider for one or more internet services at one or multiple locations. 16 Pages (20-854)

RFP: MULTIFUNCTIONAL DEVICES An organization seeks proposals for multifunctional devices for use in the copy center. Outlined are desired capabilities as well as supplier requirements. 25 Pages (20-743)

RFP: VOICE SYSTEM SOLUTION An organization seeks proposals to provide a replacement of their current PBX phone system and centralized voice mail system. 40 Pages (20-734)

RFP: ERP SYSTEM An organization is looking to replace its current system with an integrated enterprise system that will improve the efficiency and effectiveness of business processes. 28 Pages (20-733)

RFP: ERP SYSTEM In this example RFP, a city organization seeks qualified proposers to meet current & future Enterprise Resource Planning system needs. 49 Pages (20-702)

RFP: ERP NEEDS ASSESSMENT SERVICES This example RFP is for the acquisition of a new Citywide Business Enterprise software system. 8 Pages (20-701)

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)

RFP: RECORDING, INDEXING, & IMAGING SYSTEM This office is seeking the latest technological advances and hardware, including recording/cashiering with integrated scanning and indexing capabilities, e-recording, verification, bookkeeping/treasury functionality, hardware, implementation services, annual maintenance, production support, and microfilm creation/storage. 10 Pages (20-610)

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: CAD/RECORDS MANAGEMENT Following is a proposal request for a Computer Aided Dispatch (CAD) and Records Management System as well as its implementation and maintenance. 122 Pages (20-446)

RFP: CUSTOMER LOYALTY STRATEGY An organization requests proposals for a customer loyalty plan to develop strategy for customer recognition, engagement, and loyalty. 12 Pages (20-445)

RFP: ERP / CRM SOFTWARE REPLACEMENT This RFP was written in order to replace a current aging ERP software technology and potentially replace a newer internally developed stand-alone CRM system with an integrated cost effective solution. 16 Pages (20-438)

ERP / CRM RFP REQUIREMENTS Vendor responses to an ERP/CRM Software Replacement RFP can be logged according to criterion of your choosing, with rating definitions described in the document. 10 Pages (20-437)

ERP / CRM SYSTEM RESPONSE SUMMARY The following matrix shows how to compare vendor responses to an ERP/CRM software system RFP. 1 Page (20-436)

RFP: MSSP For the purpose of engaging into a partnership with a professional Managed Security Service Provider (MSSP) for security monitoring and other network & computing asset security services, this informal RFP has been issued. 9 Pages (20-412)

RFP: WIRELESS ACCESS POINT Proposals are requested for installation of new wireless access point equipment such as Xirrus Wi-Fi or equivalent. 6 Pages (20-380)

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: MOBILE WIRELESS SERVICES To meet current and future communication needs, the company is requesting proposals from qualified mobile communications firms to provide nationwide mobile voice & data services and equipment for a period of two years with two additional one-year options. 8 Pages (20-258)

RFP: CLAIMS MANAGEMENT SOFTWARE SYSTEM A hosted and managed software system is solicited. 36 Pages (20-227)

RFP: INMATE VIDEO VISITATION SYSTEM A company is seeking proposals from qualified vendors who provide a Video Visitation System (VVS) for inmates of specified locations. 25 Pages (20-215)

RFP: RECORDS MANAGEMENT SYSTEM This requests proposals for qualified contractors to provide a Records Management System to replace several existing systems. 217 Pages (20-164)

RFP: ENVIRONMENTAL HEALTH PERMIT & INSPECTION MANAGEMENT SYSTEM (EHPIMS) This is a request for qualified organization who can provide a commercial, web-accessible, off-the-shelf Environmental Health Permit and Inspection Management System software solution to transition the company from paper-based processes to electronically-based processes. 45 Pages (20-122)

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)

RFP: CASE MANAGEMENT SYSTEM This proposal was designed for an adult services case management system and includes a detailed description of requirements. 49 Pages (20-112)

RFP: MULTIFUNCTION PRINTERS The company is requesting fresh bids for MFP systems in order to maintain industry standards and to increase efficiency whenever possible. 10 Pages (20-110)

RFP: CLOUD-BASED IP PBX A request for a provider of an IP PBX (Internet Protocol Private Branch Exchange), employing converged data and voice networks. 11 Pages (20-093)

POS HARDWARE RFP RESPONSE Following is a response matrix to an RFP for Point of Sale hardware. 3 Pages (20-092)

RFP: POS HARDWARE & DEPLOYMENT This RFP is for a Point of Sale (POS) system's hardware and deployment system, with the indicated details. 9 Pages (20-091)

RFP: WEB DEVELOPMENT & SUPPORT The eCommerce and IT department are seeking a business partner with design and technical resources available to assist with the continuous development and support of its transactional website operating on the Demandware platform. 9 Pages (20-090)

RFP: NETWORK CABLING This is a Request for Proposal and Scope of Work (SOW) for a network cabling job. 1 Page (20-089)

RFP: MANAGED PRINT SERVICES This outlines the scope for Managed Print Services (MPS) including printers, software, repairs, maintenance, etc. 32 Pages (20-078)

RFP: INTERNET SERVICES This request solicits proposals from qualified firms for telecommunications / data communications to provide Internet connectivity. 12 Pages (20-077)

RFP: FRAUD, WASTE, ABUSE This requests proposals for a third-party contractor to design, implement, and administer a confidential fraud, waste, and abuse hotline for employees. 6 Pages (20-076)

RFP: MANAGED HOSTING SERVICES This request is for a vendor to serve as the provider of the hosting of applications. 16 Pages (20-065)

RFP: INTERNET SERVICES A company wishes to contract with an e-rate eligible vendor to provide dedicated broadband Internet services. 16 Pages (20-055)

RFP: GENERAL TELECOM SERVICES This is a Request for Proposal for telecom system and services. 16 Pages (20-054)

RFP: DOCUMENT MANAGEMENT SYSTEM This comprehensive Request for Proposal is for integration of several departmental document management, imaging, and workflow requirements. 88 Pages (20-035)

RFP: TECHNOLOGY ASSESSMENT This is a Request for Proposals looking for a consulting firm to provide an Information Technology Assessment. 21 Pages (20-034)

RFP: WEBSITE REDESIGN Sample this Request for Proposal for a developer to build, implement, and host a company's new website. 56 Pages (20-030)

RFP: EXTERNAL WEBSITE DESIGN This proposal seeks bids for a provider of external website design, development, and hosting services. 30 Pages (20-027)

UC-VOICE RFP This is a sample RFP for Unified Communications Voice (UC-Voice) as a Service. 15 Pages (50-394)

RFP: CLOUD BASED CALL CENTER In order to create an integrated contact center solution, responses to this RFP will be used to evaluate the functional & technical fit of vendor packages based on requirements, the vendor's overall capabilities, and value. 58 Pages (50-251)

RFP: ENTERPRISE REQUIREMENTS PLANNING SYSTEM A company is looking for an Enterprise Requirements Planning system (ERP) to replace the existing proprietary legacy business support systems. 85 Pages (50-242)

RFP: DATA & TELECOM This Request for Proposal is for a company looking to partner with a primary services provider for all-inclusive communications services. 22 Pages (50-220)

RFQ

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)

RFQ: HOSTED CONTACT CENTER The Hosted Contact Center (HCC) contracts are multiple-award Master Services Agreements (MSA) with prequalified HCC contractors for hosted contact center services under fixed-priced, multi-year terms. 14 Pages (20-413)

RFQ: COTS Quotations are requested for the non-exclusive supply of a Commercial Off-the-Shelf (COTS), cloud-based, Constituency Management System. 71 Pages (20-239)

RFQ: CASE MANAGEMENT SYSTEM The objective of this RFQ is to procure a cloud-based case management system. 26 Pages (20-111)

RFQ: INFRASTRUCTURE PLAN DEVELOPMENT This RFQ asks for a review of the current infrastructure's technical requirements, improvement recommendations, timing and costs. 16 Pages (20-107)

RFQQ: ENTERPRISE KNOWLEDGE MANAGEMENT A company wishes to begin an Enterprise Knowledge Management system to gather and build a library of pertinent information to improve service delivery and resolve customer problems more quickly. 23 Pages (20-012)

Q & A AMENDMENT FOR ENTERPRISE KNOWLEDGE RFQQ What follows is a Q&A amendment to an Enterprise Knowledge Management RFQQ. 4 Pages (20-010)

SOLICITATION AMENDMENT & BIDDER QUESTIONNAIRE This amendment answers questions raised by potential bidders of the RFQQ for Pension Modernization gap analysis. Following is a questionnaire for potential bidders to complete. 12 Pages (20-009)

RFQQ: PENSION MODERNIZATION GAP ANALYSIS This is a Request for Quotation & Qualifications to conduct a gap analysis for the company's pension unit, going from the current manual process to an automated one. 12 Pages (20-008)

Service Level Agreements

IT SUPPORT SLA This document represents a service description and Service Level Agreement (SLA) between the end users and the IT Department in order to provide support from the Help Desk. 2 Pages (20-746)

INSURANCE REQUIREMENTS Following are examples of insurance requirements when two or more organizations are engaged in contracted services. 5 Pages (20-541)

INFORMATION SECURITY REQUIREMENTS AGREEMENT This ISR is an exhibit to the Master Services Agreement effective under which provider may be engaged from time to time to provide services. 5 Pages (20-538)

SERVICE AGREEMENT THIRD PARTY POLICY This addendum to a Master Service Agreement provides policy on the use of third party software (freeware, open source) as well as third party deliverables. 3 Pages (20-537)

SERVICE LEVEL REQUIREMENTS TEMPLATE Customize this document to include any appropriate service level requirements for your department and IT system requirements. 4 Pages (20-450)

MANAGED HOSTING SLA This Service Level Agreement describes the use and availability of network resources to those who have purchased Managed Hosting Services. 5 Pages (20-417)

HOSTED EXCHANGE SERVICES AGREEMENT The following is an agreement for hosting exchange services and spam filtering. 8 Pages (20-416)

WEB HELP DESK SLA Following is a Service Level Agreement for web help desk service requests and incidents, prioritized based on impact and urgency. 2 Pages (20-386)

MASTER MANAGED SERVICES AGREEMENT This is an agreement template which outlines in detail the necessary components of a two-party service agreement. 34 Pages (20-226)

Statement of Work

PCI DSS STATEMENT OF WORK This SOW describes the terms and conditions that will apply to provided onsite payment card services. 4 Pages (20-1386)

SOW TEMPLATE A member shares a template from which you can create your own Statement of Work. 3 Pages (20-628)

RECORDING, INDEXING, & IMAGING SOW A company is looking for a complete turnkey solution to include all software, hosting, equipment, archival microfilm creation, and support. 25 Pages (20-611)

VIDEO SURVEILLANCE SYSTEM SOW The purpose is to procure a high quality, reliable and effective mobile surveillance system that will monitor and record interior and exterior events. 8 Pages (20-564)

DECLARATION OF FOURTH PARTY PERFORMANCE This template serves as a statement of a relationship between a corporation and a fourth party. 2 Pages (20-540)

PM SERVICES SOW Following is a Statement of Work for Project Management services, which can be used as a template for other purposes. 4 Pages (20-427)

PROJECT MANAGEMENT SOW The following Statement of Work template contains requirements for quality control, methodologies, and open source software. 5 Pages (20-265)

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

SOW: ENVIRONMENTAL HEALTH PERMIT & INSPECTION MANAGEMENT SYSTEM This Statement of Work describes the three-phased implementation of the system software. 57 Pages (20-133)

SOW: WEBSITE REDESIGN/IMPLEMENTATION This Statement of Work is seeking a vendor to redesign the website and implement a new official website. 3 Pages (20-016)

Vendor Management

VENDOR QUESTIONNAIRE This series of questions serves as due diligence for vetting third-party service providers. 2 Pages (20-1383)

IT BUSINESS SYSTEMS WORKFLOW This flow chart displays the process of vendor, system, and process development. 1 Page (20-1146)

VENDOR SECURITY ASSESSMENT This template rates areas of vendor security such as firewall, policy, and compliance controls. 4 Pages (20-1102)

SaaS BUYER RESPONSIBILITIES This document outlines product buyer responsibilities in a question-and-answer format. 3 Pages (50-366)

IT VENDOR RISK MANAGEMENT PROCEDURE This procedure specifies security requirements for acquisition of IT products and services in which data is stored, processed, or transmitted by an entity not under direct control. 4 Pages (20-1092)

THIRD-PARTY ACCESS POLICY This policy establishes the rules governing access to information systems, information, and computer or server room by parties such as vendors, contractors, consultants, security, etc. 5 Pages (20-924)

VENDOR SECURITY QUESTIONNAIRE Issues such as compliance, risk assessment, incident management, and requirements are itemized in this vendor survey. 3 Pages (20-887)

CLOUD COMPUTING FUNCTIONAL REQUIREMENTS This spreadsheet provides technical, security, solution, portability, and SLA requirements of cloud computing, along with performance metrics. 13 Pages (20-880)

PROCUREMENT SECURITY REQUIREMENTS Security requirements for on- and off-premise systems, data use, login, and application use are described in this document. 3 Pages (20-722)

VENDOR SECURITY ASSESSMENT This questionnaire is about secure coding, incident response, confidentiality, and other aspects of vendor security. 2 Pages (20-683)

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

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)

PROCUREMENT WORKFLOW GUIDE The following guide outlines a schedule of sequential, primary activities of a competitive process such as RFP, RFQQ, Work Request, etc. 1 Page (20-503)

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)

VENDOR PERFORMANCE EVALUATION This form is used to record vendor evaluations for later comparison. 2 Pages (20-041)

FREEWARE APPLICATION & APPROVAL FORM This form provides a format for requesting non-standard software or freeware for installation on company equipment. 1 Page (50-319)

IT PURCHASING CHART The following is an example of an ITAM approvals flowchart. 1 Page (50-316)

THIRD PARTY RISK ASSESSMENT This security questionnaire helps to diagnose possible risks with potential or current vendors. 2 Pages (50-314)

VENDOR TRAVEL POLICY This policy applies to all vendors, consultants, and contractors traveling on behalf of the company or its subsidiaries. Vendors are required to comply with this policy when requesting incurred reimbursable travel expenses as permitted by a contract. 1 Page (50-269)

VENDOR SECURITY ASSESSMENT This Application Security Review (ASR) questionnaire enables organizations to assess security compliance and serves as a prerequisite before approval of purchase or use of applications. 17 Pages (50-264)

OUTCOME ORIENTED IT SOURCING The following slide deck explores an example of outcome based sourcing evolution, pricing construct, and best practices. 11 Pages (50-262)

LIMITATION OF LIABILITY These are samples of what one organization has used for wording a Limitation of Liability clause for technology contracts. 1 Page (50-255)

VENDOR MANAGEMENT OFFICE The IT VMO helps to ensure the reliability and cost effectiveness of outside supplies. 3 Pages (50-235)

IT VMO Job description. 9 Pages (50-234)

Vendor Scorecards & Evaluations

VISIBILITY VENDOR EVALUATION MATRIX A visibility vendor can help businesses make better decisions, improve communication, and build stronger relationships with their vendors. This matrix helps evaluate your options. 14 Pages (20-1403)

VENDOR ENGAGEMENT SECURITY EVALUATION These security evaluation questions are used in vetting security of a potential vendor. 2 Pages (20-1382)

CONTRACT MANAGEMENT SOFTWARE COMPARISON Four contract management software vendors are compared in this matrix – Conga, Agiloft, ContractWorks, and Optimus BT. 2 Pages (20-1357)

PROCORE IMPLEMENTATION OVERVIEW After implementing Procore construction management software, an organization shared their assessment of the program and lessons learned. 3 Pages (20-1325)

SOFTWARE VENDOR EVALUATION MATRIX This template provides a process for recording software comparisons. 5 Pages (20-1321)

IT OPERATIONS ORG CHART This chart outlines the organization of an entire IT department and ladder opportunities. 1 Page (20-1316) 2 (cyber)

VENDOR QUESTIONNAIRE This questionnaire seeks answers on vendor licensing, storage, documentation, legal agreements, payment, insurance, and more. 2 Pages (20-1241)

MDR EVALUATION This scorecard can be used in lieu of an RFP for evaluating potential Managed Detection & Response (MDR) vendors. 2 Pages (20-1204)

LMS VENDOR COMPARISON Learning Management System (LMS) vendor details are outlined for comparison. 3 Pages (20-1196)

MANAGED DETECTION RESPONSE SOLUTIONS This document is a comparison of a group of MDR solutions. 2 Pages (20-1180)

MANAGED SERVICE PROVIDER EVALUATION Track and compare Managed Service Providers and IT support vendors by services, tools, technologies, and response times. 5 Pages (20-1171)

EVALUATOR SCORE SHEET This is a sample method for collecting vendor score information. 2 Pages (20-1170)

EVALUATION GUIDE This guide assists members of an evaluation committee in carrying out their responsibility of evaluating and scoring proposals. 15 Pages (20-1168)

BODY-WORN CAMERA SCORING This presentation describes the process a scoring team would go through for evaluation of body-worn camera providers. 17 Pages (20-1167)

DIGITAL ASSET MANAGEMENT SCORECARD The following scorecard is an example of a comparison of various digital asset management solutions. 1 Page (20-1110)

PASSWORD VAULT SCORING MATRIX Several password vault solutions are compared using features such as quality, ease of use, automated sync, security, and integration. 1 Page (20-1096)

PATCHING TOOL VENDOR MATRIX This weighted scoring template compares several patching tool vendors by service and performance. 2 Pages (20-1056)

HRMS EVALUATION TEMPLATE This template is used for the evaluation of Human Resources Management Software vendors. 1 Page (20-1051)

ELECTRONIC TIME CAPTURE REQUIREMENTS This list of requirements is for a crew-based time collection system which can integrate with an existing ERP. 3 Pages (20-1045)

EMAIL SECURITY PRODUCT SCORESHEET This chart provides a weighted comparison of several prominent email security products. 3 Pages (20-1044)

VENDOR KPI MATRIX This sample matrix compares Key Performance Indicators for vendor measurement. 1 Page (50-388)

ENDPOINT COMPARISON MATRIX This customizable spreadsheet compares several Endpoint Detection and Response (EDR) tools. 12 Pages (50-387)

EMERGING TECHNOLOGY SCREENING MAP This tool helps assess the overall impact of emerging technologies by scoring on a set of business, risk, and cost criteria. 12 Pages (50-350)

VENDOR EVALUATION MATRIX This template is for product evaluation teams to build a vendor questionnaire and to distribute and evaluate responses and vendor ratings. 23 Pages (50-349)

VENDOR SCORING MATRIX This spreadsheet scores vendors on a weighted scale. 2 Pages (20-1006)

ITS PROCUREMENT POLICY This policy outlines ownership considerations for the ITS end user hardware assets procured to enable employees to perform their job duties efficiently and effectively. 7 Pages (20-991)

THIRD PARTY VENDOR SECURITY POLICY This policy addresses the high-level requirements for system acquisition, development, and maintenance for third-party vendor-provided information systems. 7 Pages (20-990)

GENERIC SOFTWARE EVALUATION SCORECARD This form records requirements, weights, and ratings for software comparisons. 2 Pages (20-952)

PROJECT MANAGEMENT TOOL COMPARISON This spreadsheet contains specifications about several PM tools, including Planview, MS Project, CA Project, Daptiv, Smartsheet, Wrike, Asana, ClickUp, Monday.com, Bamboo, and SP Project Tracker. 24 Pages (20-932)

VENDOR SCORING MATRIX This Excel template provides a format for evaluating potential vendors and recording weighted scoring. 3 Pages (20-927)

VENDOR SCORECARD QUESTIONS Initial questions and electronic requirements are covered in this vendor scorecard for HR & Payroll solutions. 13 Pages (20-716)

VENDOR REQUIREMENTS & RATING A requirements example and ratings log for vendors is given here along with sample questions. 4 Pages (20-715)

SYSTEM SCORECARD & COMPARISON This worksheet shows a way to compare and score financial tech systems. 5 Pages (20-677)

VENDOR PERFORMANCE REVIEW Use the following template to organize your evaluations of vendor performance in areas of customer service, finance, responsiveness, and planning. 2 Pages (20-627)

VENDOR SERVICES QUESTIONNAIRE These questions were designed to determine whether a vendor can provide the expected type and level of services. 2 Pages (20-577)

ROI TEMPLATE This spreadsheet contains an example of an ROI method, logging call deflection, incremental cash flow, and risk aversion. 6 Pages (20-458)

VENDOR MATRIX This software vendor scorecard matrix is a template that could be modified to suit your comparison needs. 4 Pages (20-415)

VENDOR SEARCH TEMPLATE This workflow shows the process of researching/evaluating a vendor. 2 Pages (20-533)

VENDOR DATA & RISK ASSESSMENT This worksheet provides data on vendors as well as a risk assessment & security questionnaire. 19 Pages (20-225)

TELEPHONE SCORECARD TEMPLATE This scorecard rates everything from consoles, voice mail, and calendaring to conference calling and IVR recording. 21 Pages (20-151)

DOCUMENTATION & INDIVIDUAL SECURITY EVALUATION The Evaluator will rate how well the Proposer's solution overall satisfies the company's requirements, as well as its overall suitability for the company. 34 Pages (20-129)

REFERENCE VERIFICATION & EVALUATION Protocol for an SME (Subject Matter Expert) to check references includes phone scripts and question lists, and the evaluation worksheet follows. 24 Pages (20-126)

TECHNICAL REQUIREMENTS WORKSHEET Following is an evaluation sheet for third-party, subcontractor, and local software. 14 Pages (20-125)

BUSINESS PROPOSAL FORMAT CHECKLIST This proposal checklist accompanies a proposal for an Environmental Health Permit & Inspection Management System (EHPIMS). 3 Pages (20-124)

EVENTS MANAGEMENT SUITE This suite is a scorecard and pricing matrix for events management vendors. 2 Pages (20-096)

VENDOR SCORECARD Here is an example of a vendor scorecard, weighing services, quality, cost, etc. 4 Pages (20-040)

VENDOR SCORECARD This spreadsheet is a supplier performance management scorecard rating responsiveness, quality, financials, and more. 1 Page (10-1748)

LEARNING MANAGEMENT SYSTEM CHECKLIST This group of questions is used for researching potential Learning Management System (LMS) vendors. 2 Pages (50-399)

VENDOR KPI MATRIX This sample matrix compares Key Performance Indicators for vendor measurement. 1 Page (50-388)

ENDPOINT COMPARISON MATRIX This customizable spreadsheet compares several Endpoint Detection and Response (EDR) tools. 12 Pages (50-387)

CLOUD VENDOR QUESTIONS This series of questions explores information helpful when making decisions related to cloud hosting service adoption. 3 Pages (50-294)

DEMO SCRIPT SCORING TEMPLATES These templates provide guidance for developing vendor and script scoring techniques. 16 Pages (50-241)

SUMMARY SCORES WORKSHEET Overall scoring, pricing, functional essay, and matrix summaries are demonstrated in this template. 9 Pages (50-240)

ESB ASSESSMENT MATRIX This matrix helps assess and score various Electronic Service Bus (ESB) vendors based on technical & functional capabilities. 21 Pages (50-239)

EVALUATION MATRIX TEMPLATE: LARGE This template is used by product evaluation teams to build vendor questionnaires, distribute and evaluate the vendor responses and provide response ratings. 22 Pages (50-238)

EVALUATION MATRIX TEMPLATE: MEDIUM This template is used by product evaluation teams to build vendor questionnaires, distribute and evaluate the vendor responses and provide response ratings. 4 Pages (50-237)

EVALUATION PUNCH LIST These questions are provided to initiate the evaluation process and make sure procedures are followed. 1 Page (50-236)

Transcripts & Polls

CONSTRUCTION INDUSTRY TRANSCRIPT NOREX Members discussed emerging technologies; digital twins; IT / OT; securing Teams; project management; tracking resources; staff availability / time tracking; chargebacks; and budget trends. 16 Pages (NV2556)

DOCUMENT MANAGEMENT TRANSCRIPT NOREX Members discussed SharePoint alternatives; OneDrive; MS Power Apps; ChatGPT and Copilot; Cloud options; sending files externally; integrating an in-house ChatGPT; end user documentation; Azure DevOps; incorporating updates into multiple documents; monitoring document access; tracking document changes; and long-term file preservation. 21 Pages (NV2550)

MICROSOFT TEAMS ROOMS TRANSCRIPT NOREX Members discussed Teams Rooms usage and licensing; MTR pricing; transitioning from other platforms; Webex to Teams Rooms; Teams on Windows vs Android; domain vs no-domain join; remote hardware support; general MTR support; hardware recommendations; security considerations; room scheduling; Microsoft Places usage; and reading room hardware. 18 Pages (NV2548)

HEALTHCARE INDUSTRY IT TOPICS TRANSCRIPT NOREX Members discussed the usage of AI; security considerations; Electronic Heath Systems (EHS); use of AI for transcription; utilizing generative AI; dealing with physicians; securing PHI and HIPAA data; and the Heath Insurance Security and Accountability Act (HISAA). 16 Pages (NV2546)

MANUFACTURING INDUSTRY: SECURING OPERATIONAL TECHNOLOGY TRANSCRIPT NOREX Members discussed converting IT and OT; network segmentation; vulnerability tools; patching challenges; vendor control; unmanaged devices; integrating ERP software; data exchange security; and defining operational technology. 18 Pages (NV2541)

MANAGING SHADOW IT TRANSCRIPT NOREX Members discussed an organization maintaining a functioning Shadow IT; how to ensure business groups inform early enough; a PMO to govern and enforce; creating SOP documentation; importance of vetting external applications; dealing with repeat offenders; tools for detection; and evaluating whether Shadow IT solutions should be integrated. 15 Pages (NV2540)

FRAUD PREVENTION TRANSCRIPT NOREX Members discussed fraud experiences; fraud incident response plans; strategies for introducing prevention techniques to those outside of finance; new fraud detection tools; validating photo IDs; monitoring tools; hosting providers and standards; managing externally hosted sites; and AI risk prevention tools. 18 Pages (NV2538)

PROJECT & PORTFOLIO MANAGEMENT TRANSCRIPT NOREX Members discussed what constitutes a project: project prioritization; implementing stage gates; organizational visibility; communication tools; transitioning to a program management approach; PPM tools; reporting capability; managing "human capital"; time tracking; budgeting; and using project contractors. 21 Pages (NV2533)

ENDPOINT DETECTION & RESPONSE TRANSCRIPT NOREX Members discussed lessons learned from the CrowdStrike outage; EDR tool requirements and performance; Windows Defender; additional security controls; utilizing multiple EDR tools; Arctic Wolf usage; SIEM usage; security control validation; remote device considerations; and Always On VPN. 19 Pages (NV2528)

IMPROVING AUTOMATION THROUGH ARTIFICIAL INTELLIGENCE TRANSCRIPT NOREX Members discussed improving business processes by implementing AI; implementation experiences and challenges; vetting AI solutions; vendor-related conflicts; local government usage; KPIs; organizational training; regulatory compliance; Copilot licensing; and Copilot Studio. 14 Pages (NV2527)

FILE SHARING TRANSCRIPT NOREX Members discussed file sharing options; moving away from local file servers; Azure file shares; hybrid Azure; using multiple vendors; ShareFile usage; backup considerations; Teams guest access; external sharing; VPN alternatives; Google usage; integrating with workflows; and migrating on-prem to Cloud-based SharePoint. 17 Pages (NV2523)

KNOWLEDGE MANAGEMENT TRANSCRIPT NOREX Members discussed effective KM procedures; establishing governance; lifecycle management; creating a KM program; managing a number of knowledge bases; SharePoint Usage; tools; incentivizing employee usage; identifying SMEs; usage of Scribe; and data retention. 15 Pages (NV2521)

IMPACT OF GENERATIVE AI ON THE WORKFORCE TRANSCRIPT NOREX Members discussed introducing GenAI to the organization; where and how GenAI is being piloted and used; Copilot; linking AI products to strategic business goals; build or buy AI solutions; technology setup; Microsoft Purview; projecting proprietary data; AI reshaping / enhancing job roles; AI in data science; and AI in higher education. 18 Pages (NV2516)

MICROSOFT TEAMS ROOMS TRANSCRIPT NOREX Members discussed challenges or limitations encountered; Teams Rooms reliability; equipment experiences and recommendations; domain join vs no-domain join; remote access tools; lag issues; audio issues; echo cancellation; Teams Rooms and Zoom;

OneDrive file management; user training; camera policies; Teams updates; and overall satisfaction. 21 Pages (NV2514)

GenAI VENDOR SELECTION TRANSCRIPT NOREX Members discussed criteria applied to curating a list of GenAI vendors; controlling your data; finding vendors with industry-specific knowledge; and finding ROI for small companies. (NV2531)

CYBER INSURANCE TRANSCRIPT NOREX Members discussed policy features; cyber insurance landscape; SOC requirements; penetration testing; insurance providers; changing providers; pooled insurance; damage to partner organizations; staffing considerations; merger and acquisition issues; risk analysis; future changes; informational resources; provider questionnaires; and lessons learned. 24 Pages (NV2513)

ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Members discussed where EA fits organizationally; the role of governance in EA; purchasing / procurement departments; EA related to GenAI; SaaS solutions / contracts; technology reviews; management tools; and EA success metrics. 16 Pages (NV2510)

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)

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)

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)

VENDOR MANAGEMENT TRANSCRIPT NOREX Members discussed tiering and categorizing vendors; compliance standards; risk assessments; KPIs; benchmarking vendor pricing; the role of finance in vendor management; software asset management; licensing and audits; dealing with vendor delays; tools for vendor onboarding / offboarding; and AI and vendor risk assessment. 12 Pages (NV2479) 2, 12

NON-PROFIT ORGANIZATION IT ISSUES TRANSCRIPT NOREX Members discussed balancing board member and leadership expectations; policies and procedures; security and innovation; pricing and discounts; ERP systems; IT training and staff support; cybersecurity; and third-party vendor risk. 14 Pages (NV2478)

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)

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)

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)

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)

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed the four Cs of onboarding – Compliance, Clarification, Culture, and Connection; day-one training; credentials to access corporate systems on start day or earlier; SLA for creating starters; ITSM Salesforce ticket system; process to determine access to applications / systems; initiating sub-processes that include other groups / departments; tracking assets manually or with an automation tool; best practices for deploying and retrieving IT equipment; cached credentials; tools used for a centralized employee repository; and tracking setup. 22 Pages (NV2455)

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)

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)

IT ASSET MANGEMENT TRANSCRIPT NOREX Members discussed core investments for IT assets in 2023; successes in building an asset management program; resource levels dedicated to ITAM practices; key measures to tracking assets; foundational pieces needed before IT asset management is useful; successful ITAM tools; tracking software assets vs hardware assets; lessons learned implementing a software asset management solution; factors considered for on-prem vs Cloud-based software asset management solutions; experience with doing a formal software asset management process maturity assessment; managing endpoints for a 100% remote workforce; managing assets that do not have an agent installed; and pros / cons to a Managed Security Service. 24 Pages (NV2430)

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)

VENDOR MANAGEMENT TRANSCRIPT NOREX Members discussed software to manage the gamut of Vendor Management; primary requisites for selecting a vendor; how often to meet with vendors; negotiating price based on vendor performance; KPIs tracked for strategic vendor relationships; formalized plans for vendor selection; practices to deal with lack of communication; questions asked of vendors prior to or as part of onboarding; inclusion of SLAs and SOWs for technology residency / DR for vendor selection; and qualities of Managed Service Partners (MSPs) that do a great job and deliver. 21 Pages (NV2425)

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)

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)

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed the use of a single form or webpage for onboarding / offboarding, automation and technology deployment, best practices to be informed of new job titles / job codes, provision policies for AD accounts, enabling access in advance of a new-hire start date, assigning permission for different job titles, education of new users on their computers, length of time to onboard, processes around standard onboard training, UltiPro to work between UKG and Active Directory, and recovering hardware in offboarding. 37 Pages (NV2409)

IAM: MANAGING INDENTITIES & 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 third party accounts, and pain points with implementing OKTA for MFA and SSO. 19 Pages (NV2396)

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)

IT ASSET MANAGEMENT TRANSCRIPT NOREX Members discussed tracking assets and industry standard metrics, foundation pieces needed before ITAM is useful, assets tracked, software being used for asset management, IT asset management tools, and Block 64. 25 Pages (NV2380)

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)

VIRTUAL COLLABORATION & BUILDING CULTURE: WFH BEST PRACTICES TRANSCRIPT NOREX Members discussed reconciling and standardizing a hybrid workforce, combating organization culture loss, maintaining productivity, security, connectivity issues, equipment reimbursement, and scheduling and hoteling solutions. 22 Pages (NV2373)

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)

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)

LICENSING / CONTRACT NEGOTIATIONS TRANSCRIPT Great contracts between vendors and IT are the key to assuring accountability on the part of vendors though it can be challenging to track all the tools that get purchased within an organization. In this NOREX session, members discuss key experiences that taught their organization stronger negotiating opportunities, key wording to assure makes it into your agreements and how to tackle the challenges of tracking licensing and certifications. 19 Pages (NV2347)

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)

COVID-19: BRINGING WORKFORCE BACK TRANSCRIPT Organizations are currently working on how and when to move staff back to the office after the COVID-19 pandemic shutdown. Among the decisions to be made are whether to return the full or partial staff to the office. During this session, NOREX Members and guests discussed options, resources, and lessons learned regarding equipment returns, social distancing in the office, government requirements and guidelines, stipends for employees, work prioritization, remote work tools, sanitizing, restrictions, and temperature scanning in the workplace. This transcript includes discussion about keeping the workforce safe after returning to the office, as well as a robust chat log conversation. 53 Pages (NV2321)

VENDOR MANAGEMENT OFFICE (VMO) TRANSCRIPT NOREX Members and guests share their experience, questions, and ideas on Vendor Management Office (VMO). This session explored issues including vendor risk assessment, pricing flexibility, hardware & maintenance, performance review, security compliance, and creating a sense of urgency with vendors. 19 Page (NV2320)

COVID-19 PANDEMIC: RESPONSE, LESSONS LEARNED, WHAT'S NEXT? TRANSCRIPT Members discuss how the organization has responded to the impact to the pandemic crisis. Lessons learned on supporting WFH from a technical, hardware, security and team engagement / collaboration, and what is next perspective are shared. Polls, links, and a lively chat section are included in this April, 2020 transcript. 28 Pages (NV2315)

EMPLOYEE ONBOARD / OFFBOARD IT ISSUES TRANSCRIPT What is the corporate lead time to setup new accounts? Who is responsible for opening onboarding tickets; training; off boarding best practices and the solutions / tools to assist with automation are included in this discussion. Polls, a lively chat and BYOD / MDM

best practices are included in this March 2020 transcript. 30 Pages (NV2309)

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

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)

DOCUMENT MANAGEMENT TRANSCRIPT NOREX members share experiences selecting, implementing and managing Document Management systems during this September 2019 session. 18 Pages (NV2286)

IT BUDGET PLANNING/ BEST PRACTICES TRANSCRIPT NOREX members discuss budget planning processes, best practices, categories and helpful tools during this July 2019 session. 14 Pages (NV2280)

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)

LICENSING/ CONTRACT NEGOTIATIONS TRANSCRIPT NOREX members discuss the strategies for managing contracts and negotiating licenses during this April 2019 session. 17 Pages (NV2266)

DISASTER RECOVERY TRANSCRIPT Topics of this March 2019 session include recovery approaches such as on- prem vs. DR-as-a-Service, backup and recovery tools, testing strategies and Business Continuity considerations. 20 Pages (NV2264)

GLOBAL IT ISSUES TRANSCRIPT NOREX members share strategies and solutions used to support technologies globally during this February 2019 session. 13 Pages (NV2260)

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: VENDOR MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed responsibility of vendor relationships within IT; centralized third-party risk management program; tools / processes used to tier vendors; vetting vendors when replacing or purchasing new products; leveraging third-party technology benchmarking firms; maturity goals; switching vendors in a brownfield environment; and education / training on vendor management best practices. 13 Pages (NS256)

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: MANAGING SHADOW IT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed root causes for shadow IT; the balance between "lock down" and "user friendly"; having policies and programs overruled; incorporating shadow IT into enterprise IT management; tools for detection and visibility; moving from monitoring to enforcement; and WhatsApp. 13 Pages (NS236)

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: VENDOR MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed standing up a VMO for IT; VMO status; differentiating an IT VMO from an Enterprise VMO; staffing levels to manage vendors; team structure for negotiating contracts vs administering performance reviews; cycle frequency around assessments; centralized third-party risk management program; RFP process; SOC reporting for a non-standard fiscal year; and standard KPIs. 14 Pages (NS241)

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)

QUICK POLL RESULTS: SOFTWARE TOOLS In January 2025, 85 NOREX Member organizations responded to a poll regarding software tools. The categories included Artificial Intelligence, Disaster Recovery / Business Continuity, Document Management, Enterprise Data Storage, IT Service Management, Network Management, Security, and VDI. 6 Pages (NP2557)

QUICK POLL RESULTS: IT STAFFING & BUDGETING 2024 In October 2024, 112 NOREX Member organizations responded to a poll regarding IT staffing & budgeting. Questions included organization's total revenue, IT staff size, IT staff dedicated to cybersecurity, employee and customer end-users supported, 2025 IT staff size, salaries and budget compared to 2024, IT staff size as a percentage of the organization's overall staff size, and 2025 IT budget as a percentage of the organization's overall budget. 7 Pages (NP2537)

QUICK POLL RESULTS: CYBERSECURITY In June 2024, 107 NOREX Member organizations responded to a Cybersecurity poll. Questions included where cybersecurity resides, framework, anticipated IT security budget for 2025, percent of revenue your IT security budget represents, IT staff dedicated to cybersecurity, vendors used for security assessments, MFA / Two-factor authentication requirements, MFA solutions used, status of cybersecurity insurance, phishing test frequency, and security awareness or phishing training modules used. 7 Pages (NP2524)

THE VALUE OF AN INCIDENT RESPONSE PLAN This Member Presentation was given by an IT Project Manager with over 39 years of experience in IT positions, including Developer, Applications Manager, Project Manager, Consultant, and IT Director. He discusses lessons learned as his org recovers from a RansomHub threat actor attack. 23 Pages (MP002)

CYBERSECURITY FRAMEWORKS This Member Presentation describes a cybersecurity framework as an essential tool that helps organizations to better manage, improve, and maintain their cybersecurity systems. 19 Pages (MP001)

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)

CIO: AI & PREDICTIVE ANALYTICS TRANSCRIPT NOREX Members discussed achieving quick wins; educating the workforce for usage; using AI for planning and IT roadmaps; utilizing AI for predictive analytics for the enterprise; data strategies for usage on smaller IT teams; and bias in modeling. 13 Pages (CV088)

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)