INFRASTRUCTURE

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

Asset Management

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

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 QUESTIONNIARE. 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)

Discussions

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

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

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

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 WebForum. 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 WebForum. 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 WebForum. 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 WebForum. 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 WebForum. 19 Pages (NV2337)

CYBERSECURITY TRANSCRIPT. NOREX Members share cybersecurity best practices and tool recommendations during this July 2020 WebForum. 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 WebForum. 20 Pages (NV2325)

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

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 WebForum. 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 WebForum. 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 WebForum. 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 WebForum. 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 WebForum. 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 WebForum. 10 Pages (NV2289)

PRIVILEGED ACCESS MANAGEMENT TRANSCRIPT. NOREX members discuss the implementation and of Privileged Access Management procedures and tools during this July 2019 WebForum. 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 WebForum. 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 WebForum. 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 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)

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

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

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

Enterprise Architecture

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)

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 EQ 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

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

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. 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

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)

Polls

MEMBER VENDOR RATINGS: BACKUP/ STORAGE. This Backup and Storage Tools and Solutions poll resulted in 51 products being rated. One hundred and thirty members responded. 6 Pages (NR004)

MEMBER VENDOR RATINGS: PATCH MANAGEMENT. This Patch Management Tools and Solutions poll resulted in 24 products being rated. One hundred and thirty members responded. 2 Pages (NR003)

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)

REAL-WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. Real-World IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from Virtual Roundtable and WebForum polls. 55 Pages (DT2021-1)

YOUR DATA: 2020 REAL-WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. Real-World IT Trends is a collection of the NOREX Member input captured in the first half of 2020 from Virtual Roundtables and WebForum polls. 61 Pages (DT2020-1)

YOUR DATA: 2019 REAL WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no vendor bias when analyzing IT polls and trends. Your Data is a collection of the real world member input captured in the second half of 2019 WebForum polls. 36 Pages (DT2019-2)

YOUR DATA: 2019 REAL WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no vendor bias when analyzing IT polls and trends. Your Data is a collection of the real world member input captured in the first seven months of 2019 WebForum polls. 25 Pages (DT2019-1)

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

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

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)

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)