MICROSOFT OFFICE

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

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)

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

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

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

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

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

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

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

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT. NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams,

the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

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

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

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

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

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

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

MULTI-FACTOR AUTHENTICATION, SINGLE SIGN-ON, AND PASSWORD MANAGEMENT TRANSCRIPT. Members participate in a vigorous password management, SSO, and MFA discussion in December, 2020. Several products, links, polls, and experiences / strategies surrounding this important area of IT security are included. 21 Pages (NV2348)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

GOVERNMENT: MS365 ADOPTION. 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)

Guides and Policies

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

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

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

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

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

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

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

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

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

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

Job Descriptions

IT MICROSOFT DEVELOPER. 3 Pages (20-839)

MICROSOFT DEVELOPER. 4 Pages (20-838)

OFFICE 365 ENGINEER. 4 Pages (20-492)

Microsoft Security

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

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

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

Office 365 / Microsoft 365

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

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

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

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

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

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

OneDrive

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

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

Patch Management

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

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

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

Polls

MEMBER VENDOR RATINGS: MULTI-FACTOR AUTHENTICATION. This Multi-Factor Authentication Tools and Solutions poll resulted in 30 products being rated. 6 Pages (NR009)

MEMBER VENDOR RATINGS: ENDPOINT SECURITY. This Endpoint Security Tools and Solutions poll resulted in 50 products being rated. 5 Pages (NR008)

MEMBER VENDOR RATINGS: NETWORK SECURITY. This Network Security Tools and Solutions poll resulted in 65 products being rated. 5 Pages (NR007)

MEMBER VENDOR RATINGS: PROJECT MANAGEMENT. This Project Management Tools and Solutions poll resulted in 32 products being rated. One hundred and thirty members responded. 4 Pages (NR006)

MEMBER VENDOR RATINGS: CUSTOMER RELATIONSHIP MANAGEMENT. This Customer Relationship Management Tools and Solutions poll resulted in 26 products being rated. One hundred and thirty members responded. 3 Pages (NR005)

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)

MEMBER VENDOR RATINGS: PASSWORD MANAGEMENT. This Password Management Tools and Solutions poll resulted in 31 products being rated. One hundred and thirty members responded. 3 Pages (NR002)

MEMBER VENDOR RATINGS: HELP DESK. This Help Desk Tools and Solutions poll resulted in 56 products being rated. One hundred and thirty members responded. 8 Pages (NR001)

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

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)

SharePoint

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Teams

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

MS TEAMS TERMS OF USE. Terms of use for all enabled features of Microsoft Teams are described. 3 Pages (20-1055)

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

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

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

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

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

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

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

TEAMS SETUP QUESTIONS. This questionnaire is a list of a few simple ways to organize how you can arrange your newly-formed Microsoft Teams program. 1 Page (50-332)

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

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

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

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

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

Windows

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

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

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

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

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

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