

# Toolkit

The Vendor-Free IT Community.



## CLOUD

These NOREX Member-contributed documents include cloud strategy, discussions, evaluation, O365, policies, procedures, polls, RFP, and contracts. | TK013

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**The NOREX Document Library is continually updated for the benefit of our Members. Please consider contributing documents from your organization. Thank you!**

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# Cloud Strategy

**CLOUD VENDOR FRAMEWORK TEMPLATE.** This template provides summaries of Cloud-hosted products and the business goals to be achieved when reviewing products and vendors. 9 Pages (20-1093)

**BUSINESS CAPABILITY ENVIRONMENT OVERVIEW.** This presentation describes a BCE steering committee structure and overall support model. 7 Pages (20-1057)

**CLOUD ENABLEMENT TEAM.** This team provides leadership, guidance, best practices, research, support and / or training in order to deliver Cloud services to the organization. 2 Pages (50-362)

**CLOUD OPTIMIZATION & MAXIMIZATION.** This presentation given at the 2020 NOREX International Roundtable highlights how Cloud optimization can help achieve business goals and drive profitability. 17 Pages (20-957)

**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)

**CLOUD COMPUTING STRATEGY.** This presentation offers an overview of cloud computing and what comprises a beneficial cloud computing service. 15 Pages (20-586)

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

**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)

**CLOUD SERVICES EXECUTIVE SUMMARY.** A research group focused on what is needed by a vendor management role when creating a successful Customer Service Agreement with Cloud vendors. 7 Pages (20-183)

**CLOUD STRATEGIC ASSESSMENT TOOL.** This questionnaire is a tool to be used by IT projects to assess whether cloud computing services should be considered as a solution option. 6 Pages (20-168)

**CLOUD STORAGE USE.** This guidance document is a brief overview of the file storage tool Cloud Storage, how it works, and the risks involved. 2 Pages (20-147)

**CLOUD SECURITY FRAMEWORK.** This framework of steps procures a cloud service that meets information security policies, standards, and baselines. 7 Pages (50-347)

**CLOUD STRATEGY.** This PowerPoint describes internal and external drivers for a company cloud strategy. 4 Pages (50-335)

**CLOUD JOURNEY & COE DEVELOPMENT.** Cloud Center of Excellence (COE), strategy review, and Cloud structure foundation architecture are presented in this PowerPoint. 22 Pages (50-334)

**AWS CLOUD SECURITY STANDARD.** This security standard provides the technical and operational security requirements for AWS hosted infrastructure and services. 21 Pages (50-308)

**DEVELOPING AN ENTERPRISE CLOUD STRATEGY.** This presentation was given at a NOREX workshop and discusses the process of developing your company cloud strategy. 22 Pages (50-272)

**CLOUD VS. ON-PREMISE SOLUTIONS MATRIX.** Operating expenses, accessibility, requirements, classifications, and bandwidth are some important components to consider when choosing a cloud host vs. an on-premise system. 1 Page (50-246)

**CLOUD ENABLEMENT EXPERIENCES.** Reasons why Cloud matters, the Cloud First strategy and its execution, and lessons learned are parts of this presentation. 14 Pages (50-227)

**CLOUD ENABLEMENT PROCESS.** An overview of the process that will identify and mitigate risks and help you make the purchase of software or SaaS that is not currently implemented. 7 Pages (50-223)

## 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)

**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)

**DISASTER RECOVERY / BUSINESS CONTINUITY TRANSCRIPT.** NOREX Members discussed best practices conducting Business Impact Analysis, addressing cyber-resilience for DR and BC, determining appropriate recovery time objectives and recovery point objectives, testing and training users, testing disaster recovery plans, and the use of vendors for DR. 16 Pages (NV2379)

**DATA WAREHOUSE FOR BI TRANSCRIPT.** NOREX Members discussed developing and building a data warehouse from zero, data architecture, mastering and curation, 3rd-party consultants, integrating lakes and hubs, requirements gathering with stakeholders, ETL tools, and implementing a data API layer. 17 Pages (NV2377)

**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)

**DATA LOSS PREVENTION TRANSCRIPT.** NOREX Members shared strategies, policies, and solutions to prevent sensitive or critical information from leaving the corporate network. 21 Pages (NV2366)

**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)

**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)

**VDI AND DESKTOP AS A SERVICE (DaaS) TRANSCRIPT.** Members discuss their adoption to both VDI and DaaS environments during this February, 2021 WebForum. This discussion includes a detailed look at one members journey, several polls, and a lively chat. 18 Pages (NV2360)

[\*\*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)

[\*\*AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT.\*\*](#) Companies of all sizes see advantages to using cloud services. NOREX members cover strategies and challenges in continuing to add cloud services to their environments, with an extensive discussion around the hidden costs surrounding the cloud. 18 Pages (NV2350)

[\*\*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)

[\*\*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)

[\*\*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 WebForum, 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 WebForum 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)

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

**[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)

**[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)

**[PREPARATION FOR A REMOTE WORKFORCE TRANSCRIPT.](#)** With the onset of COVID-19 and the need for distancing, aggressive remote workforce processes are in place for most NOREX Member organizations. NOREX hosted this discussion on March 17, 2020 with over 200 participants. This transcript includes a very active chat log conversation, results from polls taken, and the takeaways we received from those who completed an evaluation. 48 Pages (NV2313)

**[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)

**[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)

**[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)

**[ANTIVIRUS FILTERS AND FIREWALLS TRANSCRIPT.](#)** In October 2019, participants inquire and share their experiences and research on anti-virus filtering and firewall tools. Several polls identify trends, opinions and strategies to combat spam and virus infection. 21 Pages (NV2291)

**[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)

**[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)

**[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)

[\*\*TELECOM/ MOBILE/ VOIP ISSUES TRANSCRIPT.\*\*](#) NOREX members discuss Mobile Device Management, VoIP solutions and telecom issues during this August 2019 session. 15 Pages (NV2284)

[\*\*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)

[\*\*BACKUP/RECOVERY TRANSCRIPT.\*\*](#) Members share experiences with the leading backup and recovery tools during this May 2019 WebForum. 12 Pages (NV2270)

[\*\*ENTERPRISE CLOUD USAGE TRANSCRIPT.\*\*](#) NOREX members discuss experiences with Enterprise Cloud Usage during this April 2019 session. 16 Pages (NV2267)

[\*\*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)

[\*\*DATA LOSS PREVENTION \(DLP\) TRANSCRIPT.\*\*](#) Getting started with DLP, DLP attributes, solutions used, cloud impact, data classification, and more are discussed during this March 2019 WebForum. 17 Pages (NV2263)

[\*\*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)

[\*\*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)

[\*\*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)

[\*\*CIO: NAVIGATING INTERNATIONAL / GLOBAL IT ISSUES DURING A PANDEMIC TRANSCRIPT.\*\*](#) During this CIO call, NOREX Members and guests shared experience and ideas on global office management, particularly in Asia. They discussed differences in products, regulations, firewalls, long distance connectivity, and collaboration tools. 21 Pages (CV074)

[\*\*CIO IT TRANSFORMATION TRANSCRIPT.\*\*](#) This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)

## Evaluation & Selection

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

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

[WEB HOSTING QUESTIONNAIRE.](#) The objective of this questionnaire is to gather detailed customer requirements for proposed web hosting projects. 6 Pages (20-735)

[INFORMATION GOVERNANCE CERTIFICATION REQUIREMENTS.](#) The intent of this questionnaire is to assist procurement with the solicitation of vendor responses to the information governance policy. Elements included are HIPAA privacy, security, and records management compliance. 14 Pages (20-363)

[PHONE SYSTEM POC.](#) This proof of concept discusses replacement of an aging phone system with Avaya PBX or hosted system. 12 Pages (20-074)

[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)

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

## Job Descriptions

[CLOUD ENGINEER.](#) 3 Pages (20-816)

[DATA ARCHITECT.](#) 3 Pages (20-745)

[SENIOR SALESFORCE PROGRAMMER.](#) 2 Pages (20-744)

[OFFICE 365 ENGINEER.](#) 4 Pages (20-492)

## Office 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)

[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)

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

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

[\*\*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)

## **Policies and Procedures**

[\*\*SaaS SECURITY CHECKLIST.\*\*](#) Aspects of Software as a Service such as vendor policies, compliance requirements, security safeguards, and documentation are part of this checklist. 2 Pages (20-1095)

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

[\*\*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)

[\*\*CLOUD COMPUTING POLICY.\*\*](#) This policy establishes the minimum requirements for securing company information that is processed, stored, or accessed through outsourced via the Internet. 3 Pages (20-484)

[\*\*SHAREPOINT ONLINE EXTERNAL ACCESS PROCEDURE.\*\*](#) Follow this procedure to configure SharePoint Online access for external users. 5 Pages (20-426)

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

[\*\*CLOUD ADOPTION SECURITY MAPPING.\*\*](#) Included is a shared model with responsibilities for both the client and the Cloud provider. 8 Pages (20-198)

[\*\*CLOUD STORAGE USE.\*\*](#) This guidance document is a brief overview of the file storage tool Cloud Storage, how it works, and the risks involved. 2 Pages (20-147)

[\*\*CLOUD COMPUTING POLICY.\*\*](#) This policy outlines the cloud computing requirements and how they apply to the company and its subsidiaries. 4 Pages (20-049)

[\*\*AWS CLOUD SECURITY STANDARD.\*\*](#) This security standard provides the technical and operational security requirements for AWS hosted infrastructure and services. 21 Pages (50-308)

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

## **Polls**

[\*\*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: 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)

[\*\*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)

**QUICK POLL RESULTS: SECURITY 2018.** In August 2018, NOREX polled the membership on security issues. Topics addressed include phishing, multi-factor authentication, passwords, cybersecurity and cloud security. 15 Pages (NP2237)

**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 and Contracts**

**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)

**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)

**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)

**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)

**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)

**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)

**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)

**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)

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

**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)

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

**CLOUD HOSTING AGREEMENT LANGUAGE.** This document provides sample Cloud hosting agreement early termination language. 1 Page (20-216)

**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)

**MASTER SERVICES AGREEMENT: CLOUD-BASED SERVICES.** This template is for the request of services related to a cloud-based environment. 23 Pages (20-088)

**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: 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)