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ACCIDENTAL TECHIE IN 2020

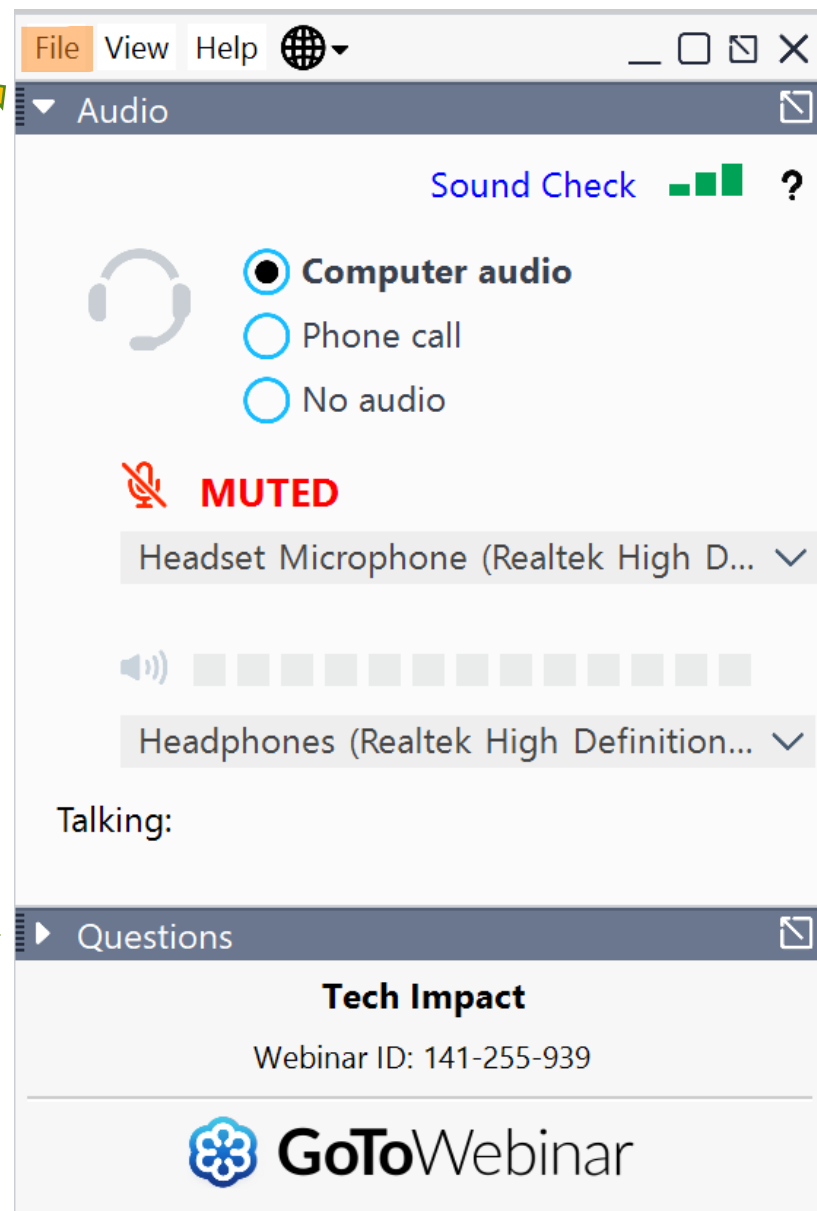Managing Software and Security

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Talking:

Questions

Tech Impact

Webinar ID: 141-255-939

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DOWNLOAD TECH IMPACT'S NEW GUIDE FOR FREE

As Accidental Techies, you may be making technology purchasing decisions for your organization. Download Tech Impact's latest free publication to help you understand the return on investment that technology may have for your organization and help steer those decisions.

https://offers.techimpact.org/tech_roi

RETURN ON INVESTMENT (ROI) IN NONPROFIT TECHNOLOGY DECISIONS

SURVEY FINDINGS AND INSIGHTS

TECHIMPACT®
IDEALWARE™

DECEMBER 2020

Course Page:

https://offers.techimpact.org/course-page-accidental-techie

Course Page

Course Page - Accidental Techie

Please bookmark this Course Page. It will be consistently updated with the information you need to access the webinars, slide decks, and recordings.

Thank you for joining us for this course.

Important Information:

- GoTo Webinar is our webinar platform. You will receive email reminders with login information for each session, or you can find the links on this page.
- **Every session will be recorded and available to individuals who have registered for the course.**
- Add training@techimpact.org to your contacts to ensure meeting details do not get caught in your spam folder.

Session 1: Hardware Infrastructure Basics

Computers, printers, phones, routers—there are a lot of gadgets that can turn glitchy. This session will cover the basics you need to know about the various pieces of hardware in a typical office and review common troubleshooting techniques to keep them up and running

Accidental Techie Schedule

This course takes place over three sessions on the following dates:

- **Thursday, December 3, 1-2:30 PM EST:** Hardware Infrastructure Basics
- **Thursday, December 10, 1-2:30 PM EST:** Managing Software and Security
- **Thursday, December 17, 1-2:30 PM EST:** The Human Side of Technology

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MELANIE MEYER

Tech Advisor, Tech Impact

In my role at Tech Impact, I work directly with nonprofits to help elevate their technology use to further their mission. I have a 20-year history working with a nonprofit for the overall strategic direction of technology, systems and processes, marketing, communications, and event management.

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JENN STACHNIK

Accounting and IT Director at Verité, Inc.

I have been with Verité for twelve years, helping the organization grow by implementing various system improvements and more efficient processes across the IT, finance, and programmatic departments. I have a passion for creating a fun and healthful work environment, as well as finding creative solutions to whatever problem is thrown my way. I have a bachelor's degree in International Business and Spanish with concentrations in French and Latin American Studies.

ACCIDENTAL TECHIES

The accidental techie is usually a person who understands computers or office equipment better than most in the organization, and can figure out how to adapt the knowledge to the organization's needs. This is the go-to person for technology issues at an office.

AGENDA

1. Identify Your Needs
2. Types of Software to Consider
3. Managing Your Software
4. Security

IDENTIFY YOUR NEEDS

TYPICAL SOFTWARE NEEDS

- Email

- File Storage

- Security

- Meetings

- Project Management

- Email Marketing

- Illustrator/Design tools

- Finance

- Contact Management

- Service Delivery and Tracking

TO THE POLLS!

What aspect of your organization's technology tools do you struggle the most with?

- Email and Calendar

- Filesharing and Collaboration

- Data Systems

- Cyber Security

- A little bit of everything

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RATE YOUR PRODUCTIVITY AND COLLABORATION

Topic	Effective	Needs Work	Priority
We are using a unified system for email, calendar and file sharing.			
Our system supports collaboration and sharing, including easy remote access.			
Instant messaging platform in widely used.			
Staff can create screen share meetings on demand			
Policies and procedure exist on how to use systems and proper use.			
Ongoing training provided to staff.			
Can we easily add and remove users.			
When a staff member leaves, we can remove organization information from their personal devices.			
We have Multi Factor Authentication setup for users accessing our systems.			
We have a system to conduct conference/video calls with individuals outside our organization.			

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INVENTORY YOUR SOFTWARE

Software	Function	Staff Responsible	Who is using it?	Annual Cost	Renewal Date/ month
O365	Email	Mary	All	$0	Ongoing
Box	File Storage	Mary	All	$2,400	Ongoing
Quickbooks	Accounting	Jeff	Accounting	$75	February

EVALUATE YOUR NEEDS

Use a structured process to consider your needs and capacity.

- What function will it serve?
- Who will use the software?
- When do we need it?
- Budget?
- What will we need in the future?

WHO SHOULD BE INVOLVED

Include:

- IT Staff

- Chief Executive

- Representative of function

- Support Staff

- Consultant

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LET'S ANSWER SOME QUESTIONS!

TYPES OF SOFTWARE TO CONSIDER

BENEFITS OF THE CLOUD

Pros:

- Low cost
- No hardware
- Remote access
- Data is secure and redundant
- Updates are done for you
- Reliable
- Mobile
- Enhanced Collaboration
- Quick Deployment
- More storage
- Flexible for growth
- Efficient recovery

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DISADVANTAGES OF THE CLOUD

Things to consider:

- Pricing can change

- Need reliable internet

- Less control

- Not backed up

- Security

SaaS (SOFTWARE-AS-A-SERVICE)
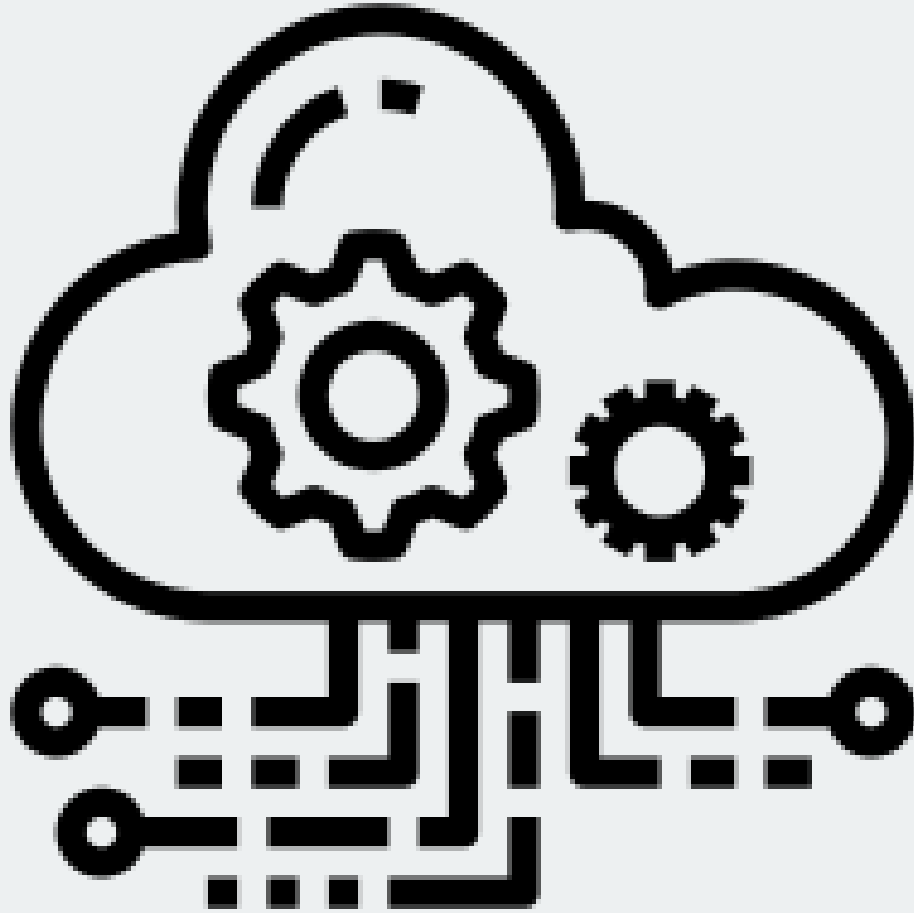
Examples:

- G-Suite
- Dropbox
- O365
- Salesforce
- Zoom

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IAAS (INFRASTRUCTURE-AS-A-SERVICE)

Examples:

- Rackspace

- Amazon Web Services

- Microsoft Azure

- Google Compute Engine (GCE)

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OPERATING SYSTEM (OS)
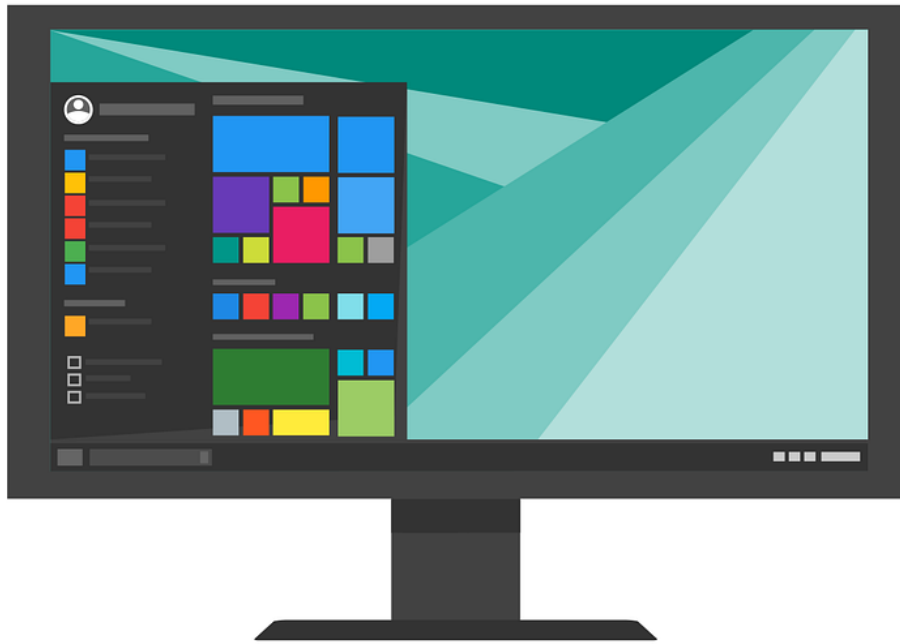
Manages all the software and hardware on a computer.

Common operating systems include:

- Microsoft Windows

- Apple Mac OS X

- Linux

- Google Chrome
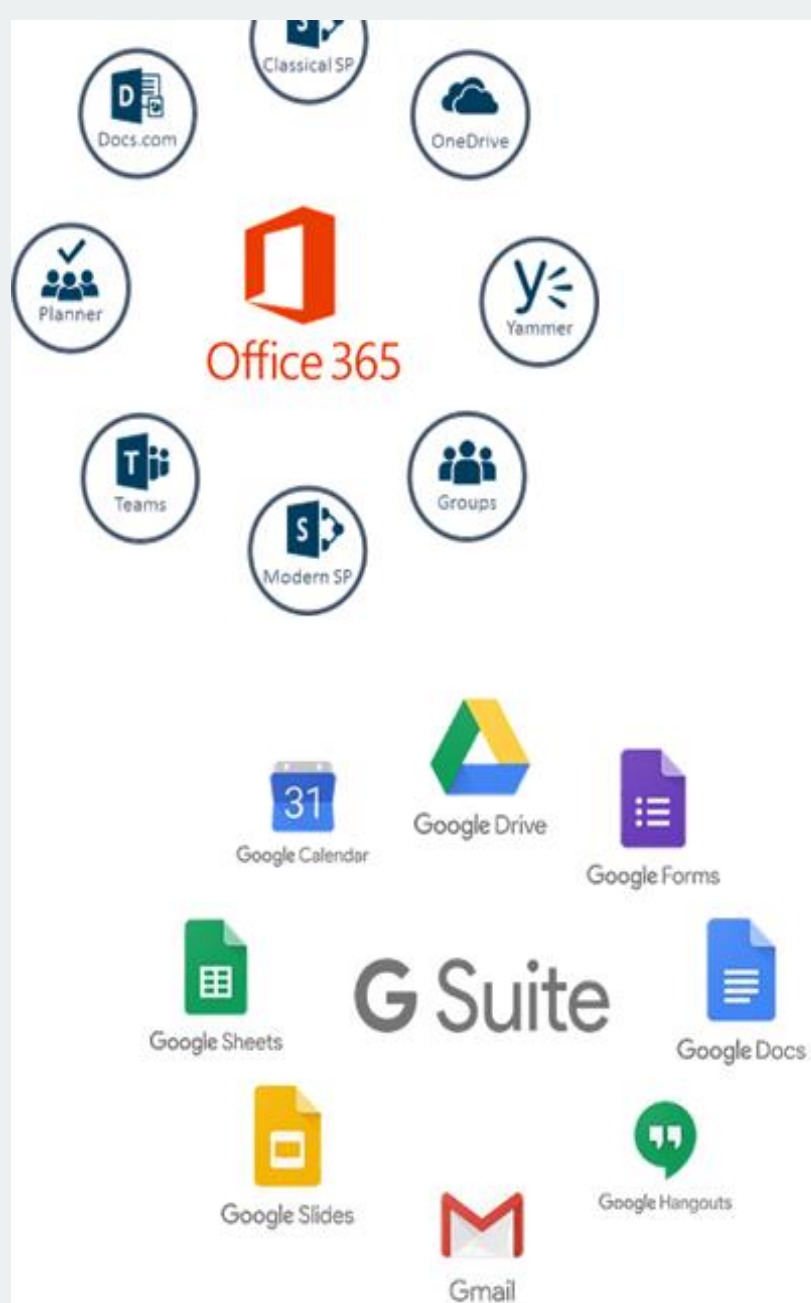
UNIFIED CLOUD SYSTEMS

Includes:
- File Storage
- Email
- Calendar
- Office Applications
- Contact Management
- Meetings
- Notes
- Forms
- Project Management
- Voice (phone)
- +++++

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FILE STORAGE

Dropbox

Remote file access and document collaboration

box.ORG

EGNYTE

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COLLABORATION/ PROJECT MANAGEMENT

- Enhances Team Collaboration
- Project Management
- Communication

VIDEO CONFERENCING SOFTWARE

- Zoom

- Microsoft Teams

- Google Hangouts

- GoToMeeting

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ACCOUNTING SOFTWARE

Consider:

- Cloud, hosted or local
- Outsourcing
- Integrations

DESIGN TOOLS

EMAIL MARKETING

SHARE YOUR FAVORITES! WHAT DO YOU USE IT FOR AND WHY? HOW HAS IT HELPED YOUR ORGANIZATION.

DATA SYSTEMS

- Donor Management
- Program and Service Delivery
- Event Attendance
- Member Management
- Volunteer Management

EVALUATE VENDORS

Things to consider:
- Support capabilities
- Experience and references
- Product functionality
- Track record
- Price

CONSIDER LONG-TERM COSTS

Make sure you don't set up something now without thinking through how much time and cost it will take to maintain it successfully.

BACK UP ALL YOUR DATA

Think about all the data you value—what should you backup?

- Email
- Databases
- Websites

LET'S ANSWER YOUR QUESTIONS!

MANAGING YOUR SOFTWARE

ADMINISTRATOR RESPONSIBILITIES

As a System Administrator:.
You can:

- Purchase and maintain software
- Set up and maintain accounts
- Install software
- Ensure updates are done
- Ensure data is secure

HOW MANY LICENSES WILL YOU NEED?

Different software packages have different licensing schemes. Work with your leadership team to determine how many licenses you need.

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DISCOUNTS FOR NONPROFITS

There are often discounts available for nonprofits.

Vendors such as Microsoft offer discounted monthly rates.

TechSoup offers a catalog of discounted services.

Always ask!

HAVE A TRAINING PLAN

- Microsoft and Google have training videos on their website.
- Lynda through LinkedIn
- TechSoup
- Google

Offer incentives and challenges, make it fun!

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SECURITY

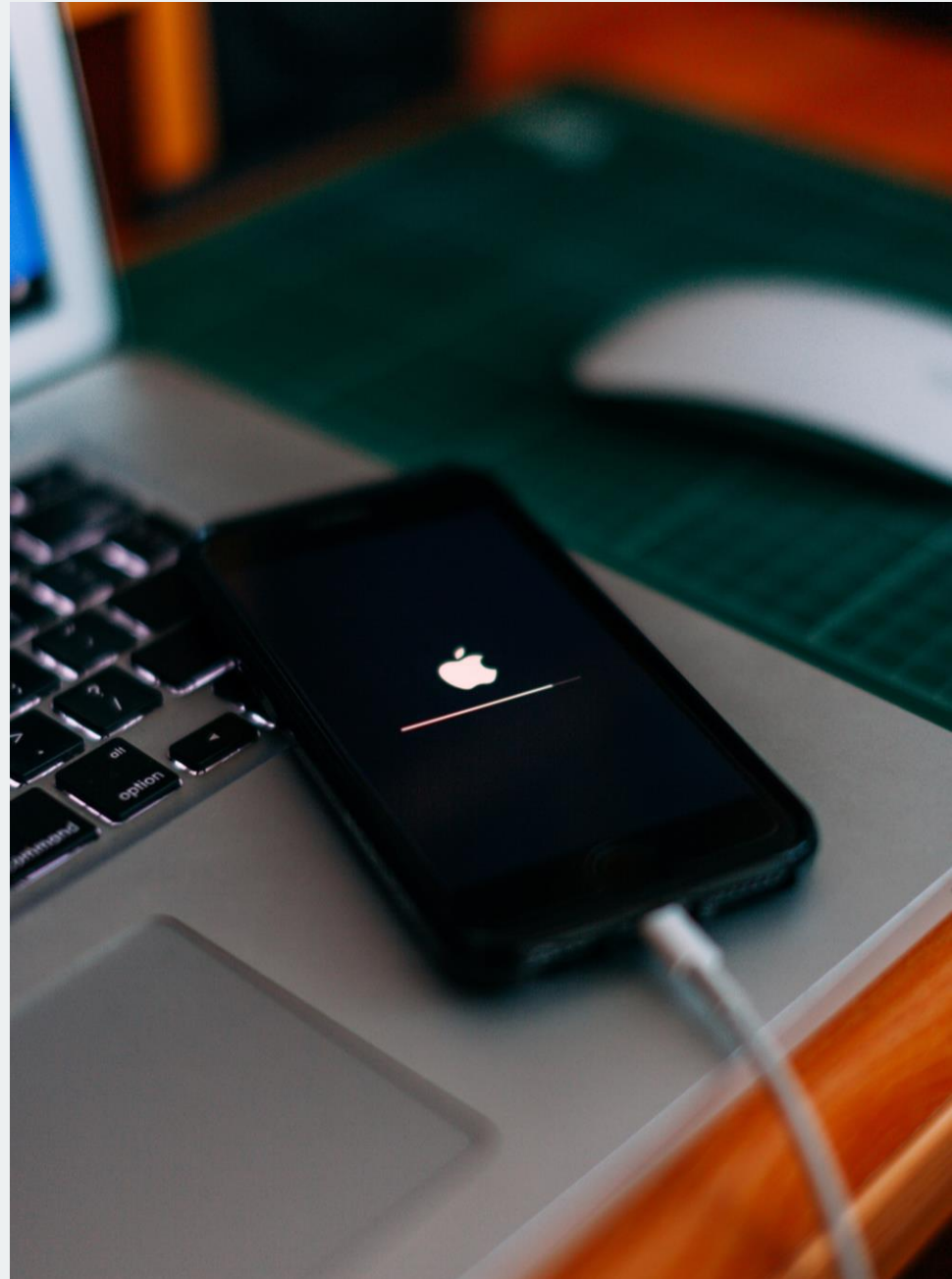# MAKE SURE AUTO-UPDATES HAPPEN

Make sure your software and operating systems can update themselves automatically with patches.
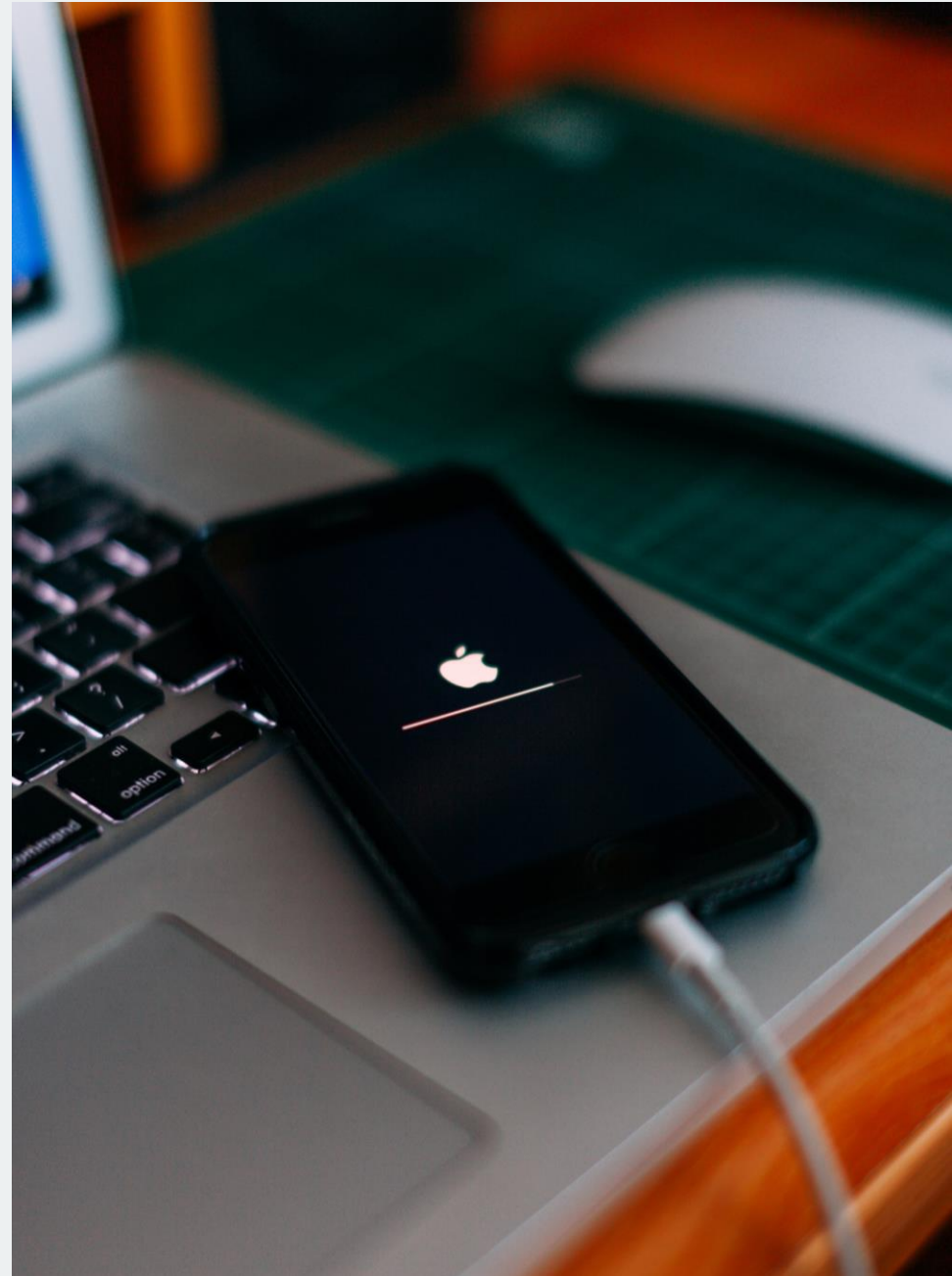
CYBER SECURITY RISK TRAINING

Is your staff educated to identify a phishing attempt?

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ANTIVIRUS/ DESKTOP FIREWALL

- Windows Defender
- Bitdefender

DON'T FORGET

Locks and alarms in an office to server rooms, copy machines, etc.

Establish policies for BYOD and data access for at home and in the office

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KEEP PAPER FILES SAFE

Even internal data such as salaries and personal data can be cause for concern.

If you can't keep information secure, digitize it or outsource the storage of it.

PASSWORD STRENGTH AND SECURITY

Sharing passwords, writing passwords on post-it notes, and having easy to guess passwords will lead to compromised data.

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KEEP PASSWORDS PRIVATE

Administrators should not know staff passwords.

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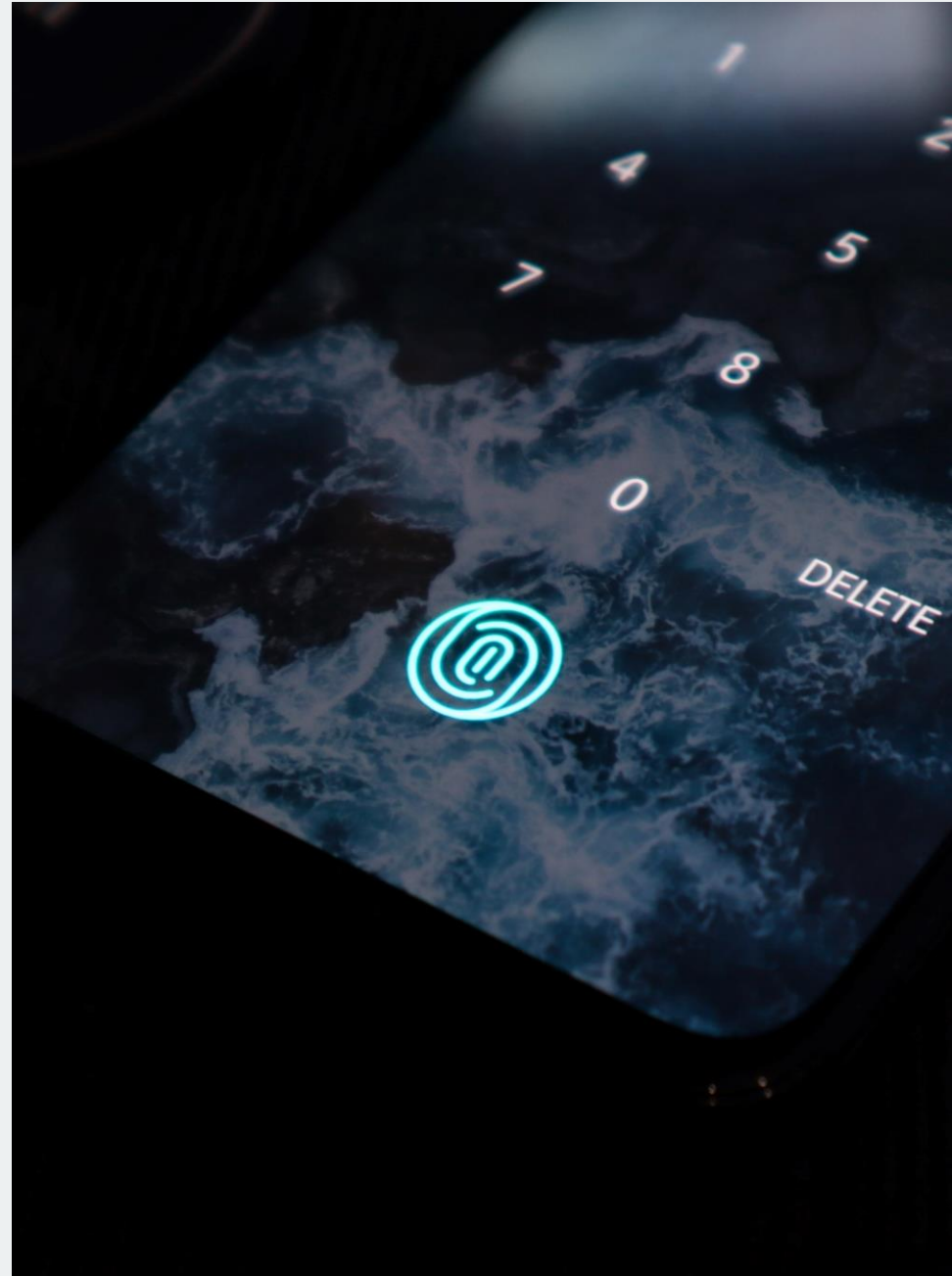# PASSWORDS MANAGERS

Leading providers include:
- LastPass
- Passly
- Keeper
- 1Password

MULTI-FACTOR AUTHENTICATION

Authentication factors include:

- **Something you have**: A physical object such as a USB Stick, card, or key.
- **Something you know**: A PIN, TAN, etc.
- **Something you are**: Fingerprint, iris, voice, etc.
- **Somewhere you are**: GPS location, certain computer network, etc.

KEEP IT EVEN SAFER

Keep truly sensitive data off site completely.

This includes credit card information, social security numbers, sensitive addresses and phone numbers.

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REGULATORY COMPLIANCE THAT MAY APPLY TO YOUR ORGANIZATION

- HIPAA - Health Insurance Portability and Accountability Act
- PCI-DSS
- GDPR
- NYS SHIELD

REGULATORY COMPLIANCE YOU CAN ASK FOR FROM VENDORS

Does the vendor support organizations that need to be compliant with:
- SSAE18
- PCI-DSS Compliance
- HIPAA

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LET'S ANSWER YOUR QUESTIONS!

Question not answered? Need more help?

Write to melanie@techimpact.org.

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QUESTIONS?

Next Session

The Human Side of Technology

December 17, 2020

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THANK YOU

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