Technology Handbook

Organisation	
Address	
Postcode	
Phone	
Email	
Website	
Handbook maintained by	
Date completed	

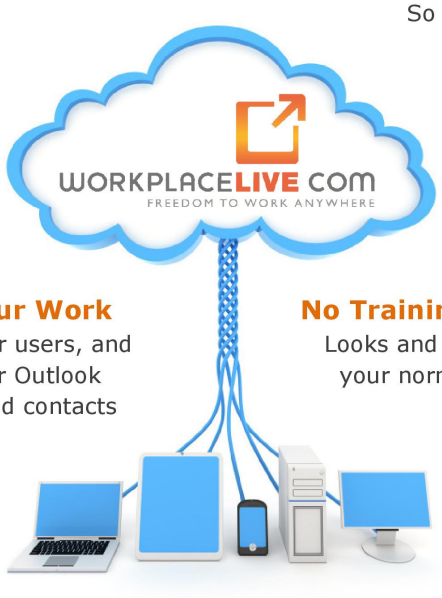
Launch your Charity into the Cloud!

Work From Anywhere!
Access from anywhere with an internet connection

Protection on Emails
All mail scanned by our AntiVirus and AntiSpam

Out of Hours Migrations
So no interruptions to your working day

Scalable to you
From 2 users to 2000+ it grows with your Charity



Not on A PC?
Work from your Tablet, SmartPhone or Mac!

Share Your Work
across all your users, and Share your Outlook calendars and contacts

No Training Required
Looks and acts just like your normal desktop

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We can support all your favourite software and applications on our Cloud based hosted desktops – allowing you the freedom to work from anywhere.

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"WorkPlaceLive is very easy to use... is more reliable than our previous internal network... and we wouldn't hesitate to recommend it to others!"
Rowena Burt
Learning through Landscapes

Learning through Landscapes

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Third Sector Leaders ACEVO Corporate Partner

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Introduction

Who is this handbook for?

This handbook is designed to be a central repository of all information relevant to the configuration and management of technology services within an organisation.

It is aimed at voluntary sector staff with responsibility for supporting, developing, managing and securing technology systems. This will vary according to the size and complexity of an organisation so could be an accidental techie, technology manager, trustee or volunteer. Whoever it is, the handbook should help in the smooth running of the systems.

It is available in two versions: a free PDF download which can be printed out and information written into it or as a paid-for editable PDF file – which should be backed up and printed out once completed.

What are the benefits of using the handbook?

- allow technology issues to be tackled methodically rather than piecemeal
- easily identify missing information - backup media, licence keys, insurance, etc
- better plan and manage technology for the future
- help an organisation to gather information required as part of a technology healthcheck
- assist support staff, both internal and external, to easily access vital information when troubleshooting or upgrading

What does this handbook not do?

- it is not a user guide
- it is not instructional
- it does not replace skilled or experienced technology staff

How should it be used?

If you have more than one office then you may need a handbook for each one.

This handbook is not a static document. It should be updated as circumstances change, e.g. as new services are added and should be reviewed on a regular (at least annual) basis.

If you have an ICT support company they may also have similar information on record, but it is worth taking the time filling in this Handbook just in case you part company with them.

Introduction

knowledgebase

Where appropriate, links have been inserted to articles on the Lasa ICT knowledgebase www.ictknowledgebase.org.uk to provide more information on the topic. The knowledgebase also has an extensive plain English glossary of terms in case there are some here that you are not familiar with – just use the Search facility.

Feedback

Lasa welcomes feedback on this handbook which should be seen as a work-in-progress. Please email us at ist@lasa.org.uk

Credits

The Technology Handbook was originally devised by Mike Veitch aided and abetted by members of the UKRiders mailing list (http://lists.lasa.org.uk/lists/info/ukriders) with further input from members of the Information Systems Team at Lasa (www.lasa.org.uk/ict). Following a trial period, it has been further revised and added to by Lasa.

Licensing

This Handbook is available in two versions:

Version

This is version 1.1 – November 2012.

Summary of Recommendations

After working through the handbook organise your action points by priority and use it as a checklist to ensure that points are completed.

No	Action point	High	Medium	Low	Who to do	Date due
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

1. Organisation

1 Organisation

Section 1 should contain a brief description of what the organisation actually does and will help those giving you support align their services with your priorities.

1.1 Description

Here you should summarise your organisation in a paragraph. This will give support staff a general overview of your organisation.

? Can you describe your organisation?

Please enter a paragraph below:

1.2 Mission statement

Many organisations have a formal, short, written mission statement that describes their purpose.

? Do we have a mission statement?

If yes, enter it below:

If no, bring this to the attention of your management.

1. Organisation

1.3 Strategy

The overall direction of technology within an organisation is guided by a technology strategy. This helps ensure that the purchase and use of technology is firmly tied to the organisation's aims and business and help make the best use of their technology resources now and in the future.

knowledgebase – A technology strategy framework
www.ictknowledgebase.org.uk/itstrategyframework

?	Do we have a technology strategy?	Yes	No
	If yes, please add it to the end of this section or enter location below		
	If no, bring this to the attention of your management.		

1.4 Staff numbers

It is useful to record how many staff and volunteers (full time equivalent - FTE) you have who are using technology in any way?

?	How many staff (FTE) do we have?

1. Organisation

1.5 Turnover

It is useful to record your current total annual financial turnover as this is related to any technology budget you might have.

?	What is our annual turnover?
	

1.6 Budget

Running effective technology within an organisation is a significant cost and must be managed.

knowledgebase – Calculating your technology budget
www.ictknowledgebase.org.uk/calculatingtechnologybudget

?	Do we have a technology budget?	Yes	No
	If yes, please add it to the document section or enter location below		
			
	If no, bring this to the attention of your management.		

1. Organisation

1.7 Responsibilities

All organisations need to make decisions and all have different processes for arriving at a decision. However it is common for individuals to be responsible for decisions.

knowledgebase – Staff responsibility for IT support
www.ictknowledgebase.org.uk/responsibilityforsupport

? Who has responsibility?
This means the individual has the authority to act on behalf of the organisation.

Area of responsibility	Name
Technology configuration:	
Technology support:	
Strategy:	
Purchasing:	
Policy and procedure:	
Security:	
Data Protection:	

You may wish to add to areas of responsibility to this list

1.8 Our Documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
1.2	*Mission Statement*	*Trustees*

2 Compliance

Section 2 will help you compile the evidence you require to demonstrate your organisation is complying with relevant legislation. The list is not exhaustive and your organisation may have other legislative requirements not listed in this section.

2.1 Health and Safety

As a minimum requirement your organisation must comply with the law. The operation of technology systems is not a hazardous environment. There are some specific requirements relating to the use of technology equipment in offices.

2.1.1 H&S risk assessments

Employers have a responsibility to ensure compliance with current Health and Safety legislation in particular you should:

- Analyse workstations, and assess and reduce risks
- Ensure workstations meet minimum requirements
- Plan work so there are breaks or changes of activity
- On request arrange eye tests, and provide spectacles if special ones are needed
- Provide health and safety training and information

Further information can be obtained form the publication *Working with VDUs* published by the HSE (www.hse.gov.uk/pubns/indg36.pdf)

knowledgebase – Computer health and safety
www.ictknowledgebase.org.uk/healthandsafety

?	Have we done any technology related H&S assessments? Yes No If yes, please add it to the document section or enter location below
	If no, bring this to the attention of your local management.

2.1.2 Electricity at Work

The Electricity at Work Regulations 1989 requires precautions to be taken against the risk of death or personal injury from electricity in work activities. In the main, the Regulations are concerned with the prevention of danger from shock, burn, explosion or arcing or from fire initiated by electric energy.

To ensure a safe working environment all electrical equipment should be periodically tested. This is usually called Portable Appliance Testing (PAT) and many companies will want to come and test your IT equipment annually and charge you a fee for each item tested. Ensure you read the leaflet *Maintaining Portable Electrical Equipment in offices and other low-risk environments* published by the HSE (www.hse.gov.uk/pubns/indg236.pdf)

?	Do we have a PAT log?	Yes	No
	If yes, please add it to the document section or enter location below		
			
	If no, bring this to the attention of your management.		

For most organisations the maintenance of the installation (that is the sockets and light fittings) will be the responsibility of the landlord, but you should check. If you have this responsibility you should engage the services of an electrical contractor.

2.2 Accessibility

Assistive technologies make your services and information more accessible to wider groups of people and also enable staff to be more productive. People with disabilities and literacy issues will gain the most benefit from available technologies with a little awareness and planning.

knowledgebase – Accessibility and inclusion
www.ictknowledgebase.org.uk/accessibilityinclusionbasics

?	Have we done any technology related accessibility assessments? Yes No
	If yes, please add it to the document section or enter location below
	If no, bring this to the attention of your management.

2.3 Data Protection Act (DPA) registration

If your organisations keep records of personal details of identifiable individuals you will probably need to register (notify) as a Data Controller with the Information Commissioners Office.

You can check your registration online at
www.ico.gov.uk/ESDWebPages/search.asp

knowledgebase – Introduction to the Data Protection Act
www.ictknowledgebase.org.uk/dataprotectionactintroduction

?	Are we registered to hold personal data? Yes No
	If yes, you should complete this section
	Registration Number: **Data Controller:** **Date Registered:** **Registration Expires:**
	If no, you should check that you do not require to register.

2.4 Copyright Acts

Stealing is crime; no one likes to have their things taken from them and used without their permission. Intellectual Property (IP) is owned too and you must have the owner's permission to use it. It is important that if you are using someone else's IP, you can show

you have their explicit permission to use it. For more on IP you can visit the Intellectual Property Office www.ipo.gov.uk/copy.htm

?	Are we using copyrighted material? Yes No
	If yes, where do we keep letters of authorisation?
	If no, bring this to the attention of your management.

2.5 Waste Electrical and Electronic Equipment (WEEE)

The WEEE directive came into effect on July 1st 2007. It was introduced in an attempt to reduce the amount of electrical waste heading to landfill and has significant implications for producers of electrical items and any non-household users of electrical items.

The list of equipment covered by the directive is extensive so a simple rule to follow is “if it has a plug or batteries then the directive applies”.

If your organisation is disposing of technology equipment, before throwing it out you should investigate donating to a company that will reuse the equipment. There are many charities that provide collection services.

If you dispose of any equipment under the WEEE directive make sure to obtain paperwork from the waste management contractor.

knowledgebase – Disposing of old computer equipment
www.ictknowledgebase.org.uk/disposingoftechnology

?	Are we complying with the WEEE directive? Yes No
	If yes, please add it to the document section or enter location below
	If no, bring this to the attention of your management.

2.6 Insurance Policy

Technology equipment is particularly vulnerable to theft either from your premises or while your equipment is out of the office. Your organisation should ensure that you have a level of cover that will ensure your don't lose out should the worst happen.

Some insurance cover for all risks can be prohibitively expensive and therefore may restrict the ways you can utilise your technology equipment.

If your organisation gives technology (or any other) advice you should check that this is covered under your organisation's Professional Indemnity Policy.

?

Do we have an all risks policy for IT equipment?

Yes No

If yes, you should complete this section

Insurance company:

Policy Number:

Renewal date:

Agent:

List any significant policy exclusions:

If no, you should periodically review your insurance needs.

2. Compliance

?

Do we have Professional Indemnity insurance for advice that we give? Yes No

If yes, you should complete this section

Insurance company:

Policy Number:

Renewal date:

Agent:

List any significant policy exclusions:

If no, you should periodically review your insurance needs.

2. Compliance

(Page left purposely blank for potential updates)

2.7 Our Compliance documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
2.3	*DPA registration extract*	*J. Latimer*

3 Inventory

This section gathers together all the information about the equipment you own or lease. It also where you keep all the information about the software you have purchased or used within your organisation.

The process of gathering this information is called an audit. The audit can be conducted manually or can be completed using software tools to help automate the process:

e.g. Belarc Adviser (www.belarc.com/free_download.html), and SpiceWorks (www.spiceworks.com).

3.1 Hardware Audit

The hardware inventory is kept for a number of reasons:

- Inclusion of items in the Assets Register
- Insurance (replacement)
- Upgrade suitability

There are many tools available that can help you compile a Hardware Inventory or you could just use a spreadsheet.

Hardware that should be included in an inventory includes servers, PCs, laptops, printers, routers, switches, firewall, wireless access points, UPS etc

For all hardware include purchase date, price, supplier, manufacturer, model name/number, serial number, warranty information, brief specification (e.g. for PCs CPU, RAM, hard drive capacity).

knowledgebase – Sample ICT Inventory
www.ictknowledgebase.org.uk/sampleinventory

3. Inventory

?

Do we use tools to compile our hardware inventory?

Yes No

If yes, please enter the name of the tool used below

If no, you should seek advice.

?

Do we have a hardware inventory? Yes No

If yes, please add it to the document section or enter location below

If no, bring this to the attention of your management.

?

If we have a hardware inventory, who maintains it?

Enter the name of the person with responsibility

If no, bring this to the attention of your management.

3. Inventory

3.2 Software audit

The software inventory is kept for a number of reasons

- To know exactly what software, and version, is installed and in use
- To enable accurate rebuilds after disaster
- To assist with licence compliance

There are many tools available that can help you compile a Software Inventory – as with hardware auditing Belarc and Spiceworks will audit your software.

?	Do we use tools to compile our software inventory? Yes No If yes, please enter the name of the tool used below
	
	If no, you should seek advice.

?	Do we have a software inventory? Yes No If yes, please add it to the document section or enter location below
	
	If no, bring this to the attention of your management.

?	If we have a software inventory who maintains it? Enter the name of the person with responsibility
	
	If no, bring this to the attention of your management.

3. Inventory

3.3 Our Inventory documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
3.1	*Hardware asset register*	*Finance Officer*

4 Configuration

The configuration of your technology system is the way you have customised the standard or default installation of hard ware or software. Recording these changes will mean that you can always access components to make further changes or in the event of disaster fully restore your technology system.

4.1 Password Safe

It is essential that you keep all passwords securely. It is tempting if you only have one or two passwords to memorise them. However, what if you are not available when the password is required? Some systems may not let you choose a password or your chosen password may not fit with their complexity rules. To ensure that passwords are available to authorised staff when required all administrative passwords should be stored in a secure file. This can be a complex electronic file system or could as simple as small notebook in a locked drawer which is accessible if your system is down. Whichever system you use the password file must be kept in a secure location.

In addition to your main administrator password you'll probably have a number of others e.g. equipment such as Internet router, firewall; Broadband account; Internet accounts including ftp to your website; hosted services – maybe you have an organisational Flickr or YouTube account, blog etc; software license accounts such as anti-virus, anti-spam; software support sites e.g. finance or database software; VPN log ins; and so on. Make sure they are all recorded. Don't forget to note down the usernames as well.

Associated with the password file should be the policy on password recording and change control.

knowledgebase – Choosing and using secure passwords
www.ictknowledgebase.org.uk/choosingpasswords

?	Do we have a password file?	Yes	No
	If yes, you should complete this section		
	Where is it located?		
	Who has access to it?		
	If no, you should document how to recover passwords and attach to the documents at the end of this chapter.		

4.1.1 Product Keys

Many of the software products installed on your server or workstations are supplied with a product key, activation code or serial number. These codes are important as they will be required to re-install the software or access online support services. All of these codes should be stored in file. This can be a complex electronic file system or could as simple as small notebook. Whichever system you use the product codes file should be kept in a secure location.

?	Do we have a product key file?	Yes	No
	If yes, you should complete this section		
	Where is it located?		
	Who has access to it?		
	If no, you should document how to recover product keys and attach to the documents at the end of this chapter.		

4.2 Server Configuration

A server is installed to meet a technology requirement. A server (or servers depending on the complexity of your system) can play a number of roles within your technology network the actual set-up

will depend on your original requirement. Some of the roles your server may perform include:

- Security – validating user logins, giving users secure permission and access to files, anti-virus and spam filtering
- Applications – centralised software, e.g. accounts, email,
- File storage – all organisational data including documents, email, databases etc
- Printers – configuring, managing and sharing printers
- Internet – controlling access to the internet
- Backup – managing the back up regime as part of a disaster recovery plan (see 7.4)

If you are a smaller organisation then you may only have a NAS (Network Attached Storage) which stores your files.

4.2.1 Users and Groups

Groups are at the heart of user management. When a systems administrator wants to give users access to a folder, a printer or application on the server, permission is granted to a group. The systems administrator will then ensure that the user requiring access is in the group.

It is vital that the group structure that is set-up on your server is recorded.

knowledgebase – Moving from personal to organisational directory structures
www.ictknowledgebase.org.uk/directorystructures

?	Do we have a record of the server group structure? Yes No If yes, you should complete this section?
	Where is it located? **Who has access to it?**
	If no, you should document the group structure.

4.3 Network

The network is a collection of components (infrastructure, hardware and software) that together allow users of the technology system to communicate with each other internally. It also allows for communication with other users and services on the Internet.

4.4 Local Area Network

The Local Area Network (LAN) is the section of the network that is normally in your premises and under your control. A LAN is the infrastructure that connects together the devices on your network – it can be cabled or wireless or a mixture of the two.

knowledgebase – What is a network?
www.ictknowledgebase.org.uk/whatisanetwork

4.4.1 Network Diagram

Your network supports all the connections between workstations, printers, servers and the Internet. Whenever possible your network should be professionally installed and maintained to current network wiring standards. If this has been done the contractor will document your network and leave you with a copy.

If you do not have a network diagram you should think of getting one done for you. It will help with fault finding.

?	Do we have a network diagram?	Yes	No
	If yes, please add it to the document section or enter location below		
	If no, you can leave this section blank.		

4.4.2 IP Address map

Your network relies on every device having a unique address. This is called the Internet Protocol (IP) address and usually takes the form 192.168.x.y. It is normal for all devices to be assigned their unique IP address by a special device called a Dynamic Host

Configuration Protocol (DHCP) server. In small networks the Broadband router usually acts as the DHCP server. In larger networks with a dedicated server, the server can be configured to act as the DHCP server.

It is usual just to let the DHCP server and the devices to configure themselves automatically. However, sometimes it is better to allow a Systems Administrator to manually configure the IP address space as some equipment requires a fixed IP such as servers, printers, network equipment such as routers, switches and wireless access points. If you have done this you should have a document that describes how the IP address space has been allocated. Some of this information can be extracted from the DHCP server but the set intended should be documented.

Also your ADSL (broadband) router and firewall and other WAN (Wide Area Network) devices will have external fixed (static) IPs which are provided by the Internet Service Provider (ISP). You should make a note of these as well.

?	Do we have IP Address map?	Yes	No
	If yes, please add it to the document section or enter location below		
			
	If no, you can leave this section blank.		

4.4.3 Wireless Access

Many broadband routers come with an integral wireless access point (WAP). This WAP allows devices with wireless connectively to connect to the router and the Internet or the organisations LAN (Local Area Network).

The WAP can be configured in many different ways including the application of security settings such as a Wi-Fi Protected Access (WPA) key. If you enable wireless access to your network you should have the WAP configuration documented. It’s especially

important to note the WPA key which will be a sequence of numbers and letters, usually generated by the device (or may be hard coded and noted on the outside of the router).

?	Do we have Wireless Access Point configuration documents? Yes No If yes, please add it to the document section or enter location below
	
	If no, you can leave this section blank.

4.5 Wide Area Network (WAN)

4.5.1 Router configuration

A router is the device that connects your private network (LAN) to the public internet (WAN). The router (or routers if you have more than one internet connection) may be provided and configured by your broadband service provider or have been installed by a technician or staff member. They will have set permissions and administrative passwords. If your router needs replacing you will need all the original configuration information.

?	Do we have router configuration documentation? Yes No If yes, you should complete this section?
	Router Model: Router Location: Router Administrator: IP addresses (internal and external): If not appended, where is the Router Configuration documentation is located:
	If no, you can leave this section blank.

4.5.2 Firewall configuration

Your firewall is the device that prevents unauthorised access from the Internet to your network; it can also help control your staff access to Internet services and also external access to the system via a Virtual Private Network (VPN). The configuration of the firewall will come from an organisation policy that clearly identifies activities that are permitted.

?	Do we have firewall configuration documentation? If yes, you should complete this section?
	Firewall device: Firewall Location: Firewall Administrator: IP address (internal) IP address (external) If not appended, where is the Firewall Configuration Documentation located:
	If no, you can leave this section blank.

4.6 Internet services

The internet is now fully integrated into the organisational technology infrastructure but is normally provided and maintained by a number of external contractors.

4.6.1 Domain Name Registration

The identity of the organisation as it appears on the Internet is called a Domain Name and will be registered with an Internet registry. If your domain name ends in .uk your domain name will be registered with a company called Nominet www.nominet.org.uk. If it is not (such as a .org or .com then it will be registered with InterNIC www.internic.net Some organisations have a number of

domain names for different services or websites – make sure you record them all and know when they are due for renewal so you don't run the risk of losing them.

knowledgebase – What's in a domain name?
www.ictknowledgebase.org.uk/whatsinadomainname

?

Do we have our own Domain Name(s)?

Yes No

If yes, you should write them in here

Domain name:

Renewal date:

Domain name:

Renewal date:

Domain name:

Renewal date:

Domain name:

Renewal date:

Domain name:

Renewal date:

If no, you should consider registering your domain name.

?

Is our domain registered with Nominet/Internic?

Yes No

If yes, where is our user account and password stored?

If no, find out which registry keeps your domain name.

4.6.2 Extract from Nominet

The information held by Nominet is published and accessible to any internet user. You should print out you own entry.

?	Is our domain registered with Nominet? Yes No
	If yes, add the printout to the documents in this section?
	
	If no, then leave this section blank.

4.6.3 Email

There are a number of options for the provision of email to staff:

- Webmail (e.g. Windows Live Hotmail, Yahoo, Googlemail)
- POP3 or SMTP mail
- Exchange server (or equivalent)
- IMAP

?	Do we have email accounts? Yes No
	If yes, complete this section as fully as possible?
	Email service type: Email service provider: Email accounts administrator Email accounts:
	If no, then leave this section blank.

4.6.4 Website

Websites have a number of management functions associated with the maintenance of the website. These tasks can be undertaken by different individuals or external contractors. The task split into two distinct areas; website design and content management. Website design is usually the responsibility of the website developer and the organisation is responsible for content management.

?	Do we have a web site design contractor/company? Yes No
	If yes, complete this section as fully as possible?
	Name of company/contractor: Address: Telephone: Email: Account manager: Web Developer assigned to us:
	If no, then leave this section blank.

You should also ensure that you have all the necessary passwords or access instructions to manage this aspect of the website and others such as blog, analysis services such as Google Analytics, wiki, Flickr, YouTube etc. You will need these if you change or terminate the contract with your developers.

Your developer may have provided you with software or other mechanisms such as access to a CMS (Content Management System) to update your website. Software could include Adobe Contribute, Dreamweaver or FTP access; CMSs could be WordPress, Expression Engine, Drupal and Plone. However, there are many other tools available to update and maintain websites.

?	How do we add/change content on our website? Complete this section as fully as possible?
	What software/CMS is used?
	Where is it installed?
	Who has access?
	Admin URL:
	Where are the usernames?
	Where are the passwords stored?
	If no, then leave this section blank.

4.6.5 Web server hosting

The organisation's website can be hosted in a number of different ways. It is preferable that an organisation actually owns and controls all access to the website.

?	Do we use a web hosting company? If yes, complete this section as fully as possible?	Yes	No
	Name of company:		
	Address:		
	Telephone:		
	Email:		
	Account manager:		
	Web Developer:		
	Web Content Managers/Editors:		
	If no, then leave blank		

4.6.6 FTP Server

An FTP (File Transfer Protocol) server allows users to upload or download files using freely available clients (such as WS-FTP, SmartFTP and FileZilla).

?	Do we use an FTP Server? Yes No
	If yes, complete this section as fully as possible?
	Name of company: Address: Telephone: Email: Admin website URL: Administrative user account: Where is the password?
	If no, then leave this section blank

4.6.7 Secure website certificates (SSL)

If you have websites which are https:// e.g. for an intranet, a remote access address or for a site which handles financial transactions, then these require SSL (Secure Socket Layer) certificates. These are renewable on an annual (or longer) basis.

?	Do we any SSL certificates? Yes No
	If yes, complete this section as fully as possible?
	https web address(es): Supplier: Telephone: Email: Contact:
	If no, then leave this section blank

4.6.8 Mailing list

A mailing list server (sometimes called listservs) maintains a list of email addresses for the distribution of email to the list members (similar to Yahoo Groups or Google Groups). List servers can be set up to require minimum administration but few require none.

An organisation may also use specialist bulk mailing services for producing and distributing communications such as newsletters (e.g. CTT Mail – www.ctt.org).

knowledgebase – An introduction to email mailing lists
www.ictknowledgebase.org.uk/emailmailinglists

knowledgebase – Choosing bulk email software
www.ictknowledgebase.org.uk/bulkemailsoftware

?	Do we use any mailing list services? Yes No If yes, complete this section as fully as possible?
	Name of company: Address: Telephone: Email: Public URL: Admin URL: Administrative user account: Where is the password? Date of contract renewal
	If no, then leave this section blank.

4.6.9 Social media services

Your organisation may have accounts with various social media services (such as Twitter, Facebook, Google+, Flickr, Pinterest, YouTube, Vimeo etc).

knowledgebase – An introduction to social media
www.ictknowledgebase.org.uk/introductiontosocialmedia

?	Do we use any social media services? Yes No
	If yes, complete this section as fully as possible?
	(1) Service name: Public URL: Admin URL: Administrative user account: Where is the password?
	(2) Service name: Public URL: Admin URL: Administrative user account: Where is the password?
	(3) Service name: Public URL: Admin URL: Administrative user account: Where is the password?
	If no, then leave this section blank.

4.6.10 Cloud services

Organisations are now choosing to use more services which are hosted on the internet in the cloud (also known as Software as a Service – SaaS). Examples include online backups, Google mail, docs and calendar, Skype, Dropbox, Salesforce, Evernote and Eventbrite.

knowledgebase – Cloud Computing 101
www.ictknowledgebase.org.uk/cloudcomputing101

?	Do we use any cloud services?	Yes	No
	If yes, complete this section as fully as possible		
	(1) Service name:		
	Public URL:		
	Admin URL:		
	Administrative user account:		
	Where is the password?		
	(2) Service name:		
	Public URL:		
	Admin URL:		
	Administrative user account:		
	Where is the password?		
	(3) Service name:		
	Public URL:		
	Admin URL:		
	Administrative user account:		
	Where is the password?		
	If no, then leave this section blank.		

4.6.11 Spam/virus filtering service

Much of email sent to your organisation will be spam (unsolicited email). Tools may be installed on your servers or workstations to filter spam; alternatively you may subscribe to an external service to prevent spam reaching your network. The service may also filter mail for known viruses.

knowledgebase – Spam – solutions, anyone?
www.ictknowledgebase.org.uk/spamsolutions

?	Do we use a spam filtering service?	Yes	No
	If yes, complete this section as fully as possible		
	Name of company:		
	Address:		
	Telephone:		
	Email:		
	Public URL:		
	Admin URL:		
	Administrative user account:		
	Where is the password?		
	If no, then leave this section blank.		

4.6.12 Website content filtering service

Content filtering may be supplied by an online company (e.g. OpenDNS www.opendns.com) in order to protect users from unsuitable websites.

?	Do we use a website content filtering service? Yes No
	If yes, complete this section as fully as possible
	Name of company: Address: Telephone: Email: Public URL: Admin URL: Administrative user account: Where is the password?
	If no, then leave this section blank.

4. Configuration

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4.7 Our documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
4.7.1.1	*Domain Name registration extract*	*Nominet*

5 Contracts

Your technology infrastructure may be supported through contracts and SLAs (Service Level Agreements) with external companies or organisations. These documents contain important information that may be required to resolve problems or conflicts. They must be held securely but easily located when required.

5.1 Service contract

If your organisation has technology services provided by a third party then this will be governed by a service contract or service level agreement. This would be the case in a resource centre where tenants are provided with IT services.

?	Do we have a service contract?	Yes	No
	If yes, complete this section as fully as possible		
	Name of company: Address: Telephone: Website: Email: Fax: Account manager: Date of renewal:		
	If no, then leave this section blank		

5. Contracts

5.2 Support contract

If you manage your own technology services but do not retain staff to manage the system then you will probably have a support contract with an external company.

knowledgebase – Working with an IT support company
www.ictknowledgebase.org.uk/workingwithsupportcompanies

knowledgebase – What to expect from a support contract
www.ictknowledgebase.org.uk/whattoexpectfromsupport

?	Do we have a support contract?	Yes	No
	If yes, complete this section as fully as possible?		
	Name of company: Address: Telephone: Website: Support website: Support Email: Fax: Account manager: Email: Dedicated technician: Email: Date of renewal:		
	If no, then leave this section blank		

5.3 Hardware maintenance contract

If you manage your own technology services and have in house expertise to provide for your support needs then you may have a maintenance contract to cover the essential hardware components of your system, such as printers. Alternatively you may have a company that you use on an ad-hoc basis to fix things when they (inevitably) break down.

?	Do we have a hardware maintenance contract or a company(ies) to repair equipment? Yes No
	If yes, complete this section as fully as possible?
	Name of company (1): Address: Telephone: Website: Email: Fax: Account manager: Date of renewal:
	Name of company (2): Address: Telephone: Website: Email: Fax: Account manager: Date of renewal:
	If no, then leave this section blank

5.4 Broadband (Internet Access Provider)

The physical connection to the Internet is usually supported by a broadband (ADSL, SDSL or leased line) service from a telecoms company, for example, BT, Virgin Media.

?	Do we have a broadband contract?	Yes	No
	If yes, complete this section as fully as possible?		
	Name of company: Address: Telephone: Website: Email: Account manager: Date of renewal: Phone number associated with line(s):		
	If no, then leave this section blank		

5.5 Internet Service Provider (ISP)

Access to the Internet is normally obtained through a contract with an ISP - this could be the same company providing your Internet access (see 5.4). If you have multiple broadband lines, you may have more than one ISP.

? Who is (are) our ISP(s)?

Complete this section as fully as possible

Name of company (1):

Address:

Telephone:

Website:

Email:

Account manager:

Date of renewal:

Name of company (2):

Address:

Telephone:

Website:

Email:

Account manager:

Date of renewal:

5. Contracts

5.6 Online service subscriptions

Your organisation may subscribe to online services (such as Google Docs, Microsoft 365, hosted servers or desktops etc.

?	Do we have online service contract(s)? Yes No If yes, complete this section as fully as possible
	Service: Name of company: Address: Telephone: Website: Email: Account manager: Date of renewal:
	Service: Name of company: Address: Telephone: Website: Email: Account manager: Date of renewal:
	If no, then leave this section blank

5. Contracts

5.7 Hardware, software and consumables supplier accounts

Your finance officer may set up accounts with approved suppliers.

?	Do we have approved supplier(s)?	Yes	No
	If yes, complete this section as fully as possible?		
	Hardware supplier:		
	Name of company:		
	Address:		
	Telephone:		
	Website:		
	Email:		
	Account manager:		
	Software supplier:		
	Name of company:		
	Address:		
	Telephone:		
	Website:		
	Email:		
	Account manager:		
	Consumables supplier:		
	Name of company:		
	Address:		
	Telephone:		
	Website:		
	Email:		
	Account manager:		
	If no, then leave this section blank		

5. Contracts

5.8 Recycling contract

To comply with WEEE regulations (see 2.5) you may have a contractor who collects and responsibly refurbishes, recycles or disposes of equipment once it has come to end of life.

?	Do we have a recycling company?	Yes	No
	If yes, please add it to the document section or enter location below		
	Name of company: Address: Telephone: Website: Email: Account manager:		
	If no, bring this to the attention of your local management.		

5. Contracts

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5.9 Our Contract documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
5.4	*BT broadband contract*	*Admin officer*

6 Policies

Your organisation may have agreed policies in order to avoid negative effects in the organisation, or to seek some positive benefit.

6.1 Disaster Recovery Policy

A disaster recovery policy may be incorporated within your organisation's Business Continuity Plan (see 7.1).

?	Do we have a Disaster Recovery policy? Yes No
	If yes, please add a copy to the end of this section or enter location below.
	
	If no, please raise this with your management

6.2 Technology Purchasing Policy

Your organisation may consider factors other than price and delivery when selecting suppliers. Local, environmental or ethical suppliers may be preferred were available.

?	Do we have a technology purchasing policy? Yes No
	If yes, please add a copy to the end of this section or enter location below.
	
	If no, please raise this with your management

6.3 Acceptable Use Policy

Your organisation will have an Acceptable Use Policy (AUP) which will describe in detail how the technology system may be used and what is explicitly prohibited. It is common practice for organisations to require staff and volunteers to sign a copy of the AUP before allowing access to the technology services.

knowledgebase – ICT Acceptable Use Policies
www.ictknowledgebase.org.uk/acceptableusepolicy

?	Do we have an acceptable use policy? Yes No If yes, please add a copy to the end of this section or enter location below.
	If no, please raise this with your management

6.4 Training Policy

Your organisation will have a policy to review appropriate training needs and budget in place to keep staff up to date.

knowledgebase – How to develop an IT training policy
www.ictknowledgebase.org.uk/ittrainingpolicy

knowledgebase – Training Needs Analysis
www.ictknowledgebase.org.uk/trainingneedsanalysis

?	Do we have a training policy? Yes No If yes, please add a copy to the end of this section or enter location below.
	If no, this should be reviewed by the management as a priority.

6. Policies

6.5 Social Media policy

This policy sets out the standard of behaviour expected in representing the organisation online.

knowledgebase – Social media guidelines
www.ictknowledgebase.org.uk/socialmediaguidelines

?	Do we have a social media policy? Yes No If yes, add the procedures relevant to technology to the documents in this section
	If no, this should be reviewed by the management as a priority.

6.6 Electronic Monitoring

It is possible to log (record) all activity within a technology system. This can include:

login/logout times

all emails sent or received

all web pages visited

all workstation activity

It is good practice and may be a legal requirement to inform staff of the level of monitoring conducted by your organisation.

?	Do we undertake any electronic monitoring? Yes No
	If yes, please add a copy to the end of this section or enter location below
	If no, please leave blank

6.7 Firewall Policy

As part of the AUP some activities may be restricted by the network service through the use of a firewall. For example the AUP may not permit users to access social networking sites. This can be prevented through configuring the firewall in line with a firewall policy or use of a service such as OpenDNS (see 4.6.12).

?	Do we have a firewall policy?	Yes	No
	If yes, please add a copy to the end of this section or enter location below.		
	If no, please leave blank		

6.8 BYOD Policy

A BYOD (Bring Your Own Device) policy covers the usage of mobile devices such as smart phones, tablets etc which are allowed to access organisational technology resources.

knowledgebase – The Bring Your Own Device Nightmare
www.ictknowledgebase.org.uk/byodnightmare

?	Do we have a BYOD policy?	Yes	No
	If yes, please add a copy to the end of this section or enter location below.		
	If no, please leave blank		

6.9 Homeworking Policy

A Homeworking policy provides guidelines for employees who work remotely, both permanently and temporarily, and have access to organisational resources. The policy may also cover usage in remote locations such as coffee shops, internet cafes, libraries etc. It may also relate to or overlap with your Acceptable Use and Bring Your Own Device policies.

knowledgebase – Home Sweet Home? The Joy Of Telecommuting
www.ictknowledgebase.org.uk/telecommuting

knowledgebase – Martini Security – Working Safely Online, Anytime, anyplace, Anywhere.
www.ictknowledgebase.org.uk/workingsafelyonline

?	Do we have a homeworking policy?	Yes	No
	If yes, please add a copy to the end of this section or enter location below.		
	If no, please leave blank		

6.10 Data Protection policy

A Data Protection policy is not about explaining Data Protection; there are plenty of places you can find more information (see 2.3). It is about setting down the decisions your organisation has made about how it will comply with its legal responsibilities, and about making sure that everyone in the organisation knows what their individual responsibilities are.

Data Protection is important, not because it is about protecting data, but because it is about protecting people. People can be harmed if their data is misused, or if it gets into the wrong hands, through poor security or through careless disclosures. They can also be harmed if their data is inaccurate or insufficient and decisions are made about them, or about what services to provide them with.

knowledgebase – Data Protection policy (you can download a framework policy with model clauses)
www.ictknowledgebase.org.uk/dataprotectionpolicies

?	Do we have a data protection policy?	Yes	No
	If yes, please add a copy to the end of this section or enter location below.		
	If no, this should be reviewed by the management as a priority.		

6. Policies

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6. Policies

6.11 Our Policy documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
6.3	*Acceptable Use Policy*	*HR officer*

7 Procedures

7.1 Business Continuity

If your organisation has prepared a Business Continuity Plan (BCP), a component of this will be a set of procedures relating to technology services. This handbook may provide information relevant to the BCP procedures. You will need to carry out a risk assessment which will inform the plan.

knowledgebase – ICT Risk Assessment (contains a RA framework)
www.ictknowledgebase.org.uk/riskassessment

?	Do we have a Business Continuity Plan?	Yes	No
	If yes, add the procedures relevant to technology to the documents in this section		
	If no, this should be reviewed by the management.		

7.2 Technology user induction

Each organisation has tailored their technology system to meet specific requirements and methods of operation. New staff should be familiarised with the technology system as part of their induction process.

knowledgebase – technology Induction manual
www.ictknowledgebase.org.uk/inductionmanual

?	Do we have an induction procedure for new staff/volunteers? Yes No
	If yes, add the procedures relevant to technology to the documents in this section
	
	If no, this should be reviewed by the management.

7.3 Support and housekeeping

When things don't go as planned due to a hardware breakdown, software glitch or network connection issue you'll need a procedure for staff and volunteers to follow – who to initially contact, who escalates it to your support company if it can't be sorted in house, how it's recorded and monitored. You might also want to have a procedure for housekeeping which can assist in keeping support calls at bay.

knowledgebase – Good housekeeping
www.ictknowledgebase.org.uk/maintenancetips

?	Do we have a support and housekeeping procedure? Yes No
	If yes, add the procedures relevant to technology to the documents in this section
	
	If no, this should be reviewed by the management as a priority.

7. Procedures

7.4 Backup

All organisations must be able to restore the technology system to a known state in the event of disaster. The procedures for recovery are part of the Business Continuity Plan but will rely on backups being available. Testing for restore purposes should be an integral part of the backup procedures.

knowledgebase – Developing a backup strategy
www.ictknowledgebase.org.uk/backupstrategy

?	Do we have a backup procedure?	Yes	No
	If yes, add the procedures relevant to technology to the documents in this section		
	If no, this should be reviewed by the management as a priority.		

7. Procedures

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7.5 Our documents

You should list the documents you have added to this handbook for reference. If the document is not in the handbook then you should give the location and who maintains the document. (The first entry is an example)

Section Ref	Document Description	Maintained by
7.1	*Business continuity plan*	*Director*

8 Appendices

8.1 Additional suppliers and services

These pages are to record details of any additional services which you are unable to record in the previous sections if you run out of space.

? Miscellaneous suppliers

(1) Name of company:

Address:

Telephone:

Website:

Email:

Account manager:

Nature of business:

(2) Name of company:

Address:

Telephone:

Website:

Email:

Account manager:

Nature of supply:

(3) Name of company:

Address:

Telephone:

Website:

Email:

Account manager:

Nature of supply:

8. Appendices

?	Miscellaneous services
	(1) Service name:
	Public URL:
	Admin URL:
	Administrative user account:
	Where is the password?
	(2) Service name:
	Public URL:
	Admin URL:
	Administrative user account:
	Where is the password?
	(3) Service name:
	Public URL:
	Admin URL:
	Administrative user account:
	Where is the password?
	(4) Service name:
	Public URL:
	Admin URL:
	Administrative user account:
	Where is the password?
	(4) Service name:
	Public URL:
	Admin URL:
	Administrative user account:
	Where is the password?

8. Appendices

8.2 Technology Healthcheck

A technology healthcheck can be a good starting point to help you understand your technology system and what needs to be done to keep it in shape. Many technology consultants including Lasa offer a healthcheck service – see Suppliers Directory below.

8.3 Sources of help

Help is all around; getting is just a matter of asking the right question to the right person. Knowing how to ask the question and finding the right person to ask is the hard part. When you need help, try to follow a logical path to solve your problem rather than a haphazard approach.

Lasa maintain the **knowledgebase** which will help with most of your queries about technology – see www.ictknowledgebase.org.uk.

TechSoup is a US website similar to the knowledgebase www.techsoup.org and Idealware hosts a number of software comparisons www.idealware.org

8.4 Sources of advice

Advice is something you get to avoid you needing help at a later stage. Good technology advice is something that is available from Circuit Riders and other technology professionals. You can find a list of Circuit Riders who have signed up to a list of core working principles and more information about Circuit Riders at the UKRiders website http://ukriders.lasa.org.uk

In addition, Lasa maintain a list of individuals and suppliers that have proven track records of working with voluntary sector organisations who can help you – see the **Suppliers Directory** – www.suppliersdirectory.org.uk

AbilityNet www.abilitynet.org.uk provides help and advice on assistive technology and accessibility issues (see 2.2).

iT4Communities www.it4communities.org.uk helps match technology professionals who volunteer their time and expertise to assist voluntary organisations with ICT projects.

Charitywebforum
http://tech.groups.yahoo.com/group/charitywebforum/ is a Yahoo mailing list for staff developing and maintaining third sector websites and other web-based communication services.

8.5 Further resources and publications

Computanews – a quarterly online technology magazine published by Lasa for small and medium sized voluntary sector organisations.
www.lasa.org.uk/publications/computanews/

Computanews ICT guides - Lasa also publishes a range of short guides on data protection, project management, security, managing technology and circuit riders.
www.lasa.org.uk/publications/computanews-guides/

ICT e-bulletin - the free monthly ICT e-bulletin compiled by Lasa and Superhighways is aimed at smaller voluntary and community organisations, managers, circuit riders and accidental techies and contains news, events, training and learning, funding and awards, resources, practical tips, tools and applications and opinion.
www.lasa.org.uk/publications/london-ict-bulletin

ICT Hub publications (available to download from www.ictknowledgebase.org.uk/downloadableguides):

A guide to managing technology

How to cost and fund technology

An technology survival guide for trustees

Managing technology to meet your mission – A US publication from NTEN – written by and for non-profit technology staff and non-profit leadership staff, this collection of case studies, analyses, and guidelines shows how technology can be strategically

deployed in their organisations to better accomplish a nonprofits' mission. Book available from Amazon.

Data Protection in the Voluntary Sector – third edition of Paul Ticher's standard work on the subject – available from The Directory of Social Change
www.dsc.org.uk/Publications/Law/@54046

Wired For Good by Joni Podolsky - a nuts-and-bolts guide to strategic technology planning for non-profit organisations, available from Amazon.