IT RadixResource

We make IT work for you

The Game of Life

Checkmate! What's Your Next IT Security Move?

For those of you who have played the game of chess, you know that each piece has its specific role and rules of engagement. For example, the bishop can only move diagonally across the board and so on. The same is true in many organizations, each person has a role and responsibilities within the organization. With those responsibilities comes the need to know and have access to certain information.

From an IT security standpoint, we often find that organizations will take the path of least resistance and give everyone access to everything. Occasionally, we will find human resources and accounting data segregated and secured differently, but not always. When was the last time you reviewed your data overall? Where is it stored? What are the access rights? Do you have a corresponding written security policy that identifies categories of data and what job functions should have access to the information? Are you aware of what your legal responsibilities are to protect certain types of information?

As a simple example, employee birthdays are considered personally identifiable information. Here at IT Radix, we like to celebrate our team members birthdays which prompted us to think about how that information is stored in our system. In the beginning, we used to store this information in a place where multiple people could see the month and day but not the year. We have subsequently modified this to move it to a place where only the appropriate personnel can access it.

What about information like invoices, received payments, or perhaps information about your clients? Should everyone have access to everything, or should some of this information be segregated out and specific security access rights be granted? Some industries such as insurance and financial services require that a security officer be designated. They have the legal obligation to perform security oversight to specific types of data which includes files and email.

Let's take a closer look at banking information. Does your organization accept credit cards? In general, most do. Most organizations think that because the credit card is processed outside of their network that they are protected. But let's

(Continued on page 2)

Best of the Best
Daily Record
MORRIS COUNTY
READERS CHOICE CONTEST 2017

IT Radix is a Daily Record's **Best of the Best of Morris County** award winner! We're tickled "red" to be recognized as one of the IT service industry leaders in Morris County especially since this is a people's choice award. Providing our clients with WOW service where our clients always come first is key to our business success and an integral part of our Core Values!

MONOPOLY

What's New

If you would rather receive our newsletter via email, sign up on our website or send an email to resource@it-radix.com

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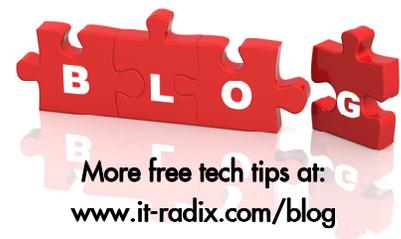
B L O G

More free tech tips at:
www.it-radix.com/blog

Organizing Your Virtual *Jenga* Tower

Have you ever seen anyone play the game of *Jenga*? It starts with a tower of wooden bricks, sometimes 16 layers high. Each player takes a turn at removing a brick and then places it back on the top of the pile. The tower starts off very stable but ends up very wobbly and eventually collapses in the end. The tower sometimes grows two to three times its original size in height. The object of the game is NOT to be the one that causes the tower to fall.

Your data files—whether on your server or on your own PC or cloud drive—are a lot like a virtual *Jenga* tower. They start out usually all nice and organized, but day after day, with each new file added, revised, saved, etc., the virtual *Jenga* tower of data files grow and can quickly become very disorganized and difficult to maintain. And if you are not careful about data organization and storage, over time, you will very likely not be able to easily and quickly find files that you want to access in a flash.

Here are some recommendations for keeping your data files organized as they grow:

- **You are your own first customer.** By approaching this in an organized fashion, you are putting a customer first and that customer is you! Organize things to benefit yourself...so that you can ultimately better serve your clients.
- **Save in a single place.** Generally, it is best to have a single organized place on your server or your PC where you store files. Resist the urge to store on the desktop. Use that only for something very temporary. Desktops quickly get messy and overrun with useless, old and duplicate files.
- **Save in a hierarchical fashion.** Think about how you do business and how you organize things, how you make decisions, your approach to clients and to internal issues. Then, map out a simple hierarchical structure from a big picture level. Think through most files, and see if they can all fit. If not, add—but add sparingly!
- **Set a naming/version structure.** Devise a basic template for the names you will give to saved files. Think in terms of time/year/client/department...whatever makes sense to you. Then use that naming convention for every file you save. After a while, it will become second nature and prove to be very helpful downstream.
- **Practice folder creation economy.** Think and act in a minimalist fashion—do not waste folders! Most files can easily be saved within a simple hierarchy if you have done a good job of thinking about the hierarchy first!
- **Archive the old.** Out with the old, in with the new! Well, not exactly. Create an archive folder for old files that are very unlikely to be needed over the next 18-24 months. The archive can easily be accessed if need be. That way these older items are not clogging up the works.
- **Keep at it.** One major reason to set up a file structure like this and to "keep at it" is that as business moves along, something that currently is incredibly top of mind with you and consuming all your time today, will be less meaningful to you as time goes on and quickly forgotten in 5 years. However, you might want it back; so store it in a place where you can find it in the future!

With the proper foresight and planning, you can become a virtual *Jenga* winner. Need help getting organized? Give us a call and we'll be happy to help.

Next IT Security Move

(Continued from page 1)

review the scenario where a client calls in the credit card number and does not enter directly on an external ecommerce site. What does your team member do with the number? Likely they write it down (we'll assume they shred this piece of paper later). Then they may launch the software that allows them to key in the credit card number to the processor. It might be a web browser or it could be your accounting software. What happens if the machine the person is using has spyware installed unbeknownst to them? The credit card number could potentially be compromised. And if the credit card is stored in your software—which it is if you're using QuickBooks to process the credit card—you now have an even a bigger issue.

As you can see, it's important to look at all aspects of your organization's information: identify the types of data, identify who needs to have access and identify what are the areas of potential risk. And then, like in the game of chess, you need to establish the rules of how your team members can move around within your computer network including their own machines which may need to be locked down as well.

We encourage you to call us today to review your business processes and corresponding security access permissions to ensure that you can win the game of chess today!

"Life is the only game in which the object of the game is to learn the rules."

— Ashleigh Brilliant

OUR CLIENTS SPEAK OUT:

THE BUZZ

"I have been impressed with the technical knowledge, professionalism, and responsiveness at Team IT Radix ever since my first meeting with Cathy in 2011. This past summer, we moved office locations and registered our financial planning and investment management firm with the SEC. Team IT Radix quarterbacked the technical hardware and software elements of the transition flawlessly. With much gratitude..."

Charles P. Weidman, CFP®, MBA – Heritage Financial Counselors

IT Radix Resource
We make IT work for you

Step 2 to Enhancing Your IT Security

You're in a hurry and need to get an email sent, but you have one concern…you need to include some sensitive information. If you have **email encryption** enabled, it's not a problem. You add the encryption code word to the subject line or in the body of the email and hit send. You can be confident that the entire message is encrypted—not only in transit but upon receipt. No email encryption? While it's encrypted in transit, the email message itself is not encrypted and can be read by anyone.

If the email happens to contain a social security number or credit card number, you don't even have to add the code word; your email encryption policies are smart enough to encrypt the message automatically without you having to even think about it.

As we've said, your business is your castle; and email encryption is a great additional security layer to protect it. Ask us about email encryption today.

Proudly folded & stuffed by Park Lake School

Can You Build a Better Mousetrap?

Do you find yourself sighing over a missed sales lead, avoiding a monthly review of your business results because information is not in one place, or simply frustrated over the amount of work needed to get a job done? Clever and thoughtfully deployed office automation may be the solution.

Like the game *Mouse Trap*, automating a process can complete a series of tasks in a pre-determined sequence. When the first is complete, a trigger will engage the next, and so on. Specifically, office automation can reduce the amount of time you spend doing mundane tasks. It can mean freeing up people from boring repetitive tasks and follow through and engaging them in more interesting, complicated work or client interaction—things that can impact your business success in new ways. Automation will also make sure you get the same consistent results every time with fewer errors.

If this sounds familiar to you, you should explore automation using business technology. A simple example of this is the automation of email marketing. Your complete marketing campaign can be crafted up front. You enable the automated process and your pre-determined series of events kicks off: send an email, wait two weeks, send another email, wait three days and create a task for your salesperson to make a personal follow-up call. Simple, repeatable workflows that make sure your marketing touches take place when they should and help drive more business.

Adding this type of automation can be revolutionary for your company. Here are a few ideas to get your creative juices flowing:

- **Client feedback** – Gather client feedback, routing concerns and issues to the right party for resolution; feeding that information into a database which can produce reports for trend tracking; and store that feedback on the customer record in your Customer Relationship Management (CRM) system.
- **Data collection** – Creating an Excel spreadsheet that tracks data about your organization, performs calculations on the data (e.g., percent of successful sales conversions), and produces reports, graphs, and charts. Once you get the right process and spreadsheet in place, you can analyze your business every month with a minimum of effort.
- **Approval processes** – Streamline your approval processes for vacation requests or documents such as budgets, contracts, or specification reviews using Microsoft Flow and its integration with over a 100 different services such as SharePoint, OneDrive, Salesforce, Act!, Adobe Sign and much more.

Bear in mind, it is important to avoid "over-automating." Creating efficiency is great, but not at the expense of taking the personal touch out of your business relationships. We've all been the victim of bad automation—automated phone systems that don't allow you to exit to a real person—which can leave an unpleasant taste. Sometimes, only person-to-person interaction will do. When designing your business automation, be sure to leave some personal interaction in place.

Office automation will look different in every office and every business. Where do you begin? For starters, likely candidates for automation include: mistake-prone processes, boring repetitive tasks, workflows that require gathering information from multiple places and re-keying it in a different place. Luckily, you probably already have the technology basics in your existing office environment: Microsoft Office 365 with Exchange and the Productivity software (Word, Excel, Outlook, etc.) and business applications with readily accessible data.

There has never been a better time to undertake strategic automation in your business. Give IT Radix a call. We'll be happy to help you build a better mousetrap!

> "The goal is to win, but it is the goal that is important, not the winning."
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> — Reiner Knizia
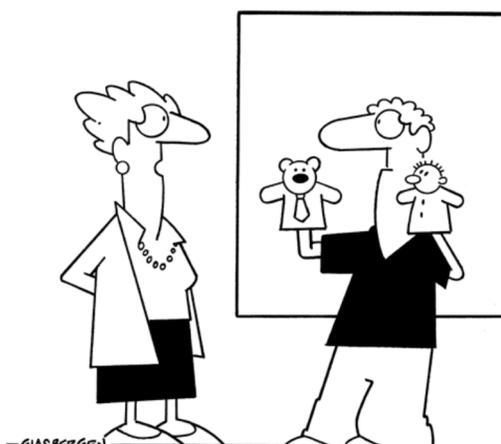
"Any chance you could learn PowerPoint before your next presentation, Jim?"

From the desk of: Cathy Coloff

Growing up as a kid, I don't really remember playing many board games until I reached high school with the exception of Backgammon. We had a travel version of it that I would play with my family and friends on our sailing trips in the waters of North Carolina. Back then, the choices were much more limited. Recently, I was shocked to go to the toy store and see the array of choices there are today! I didn't know where to begin and if you add in video games, I'm completely lost. I'm happy to see many of my favorites are still around and, hopefully, still enjoyed today.

Sometimes it feels that way when it comes to technology. The number of choices for just about everything has completely exploded—from the basics such as a keyboards and mice to actual software. If you search Google for something like note-taking software, you'll find over 250 choices to choose from…crazy! One of the things we often do for our clients is to help curate the array of choices. Of course, it's impossible for us to be familiar with every choice; but based on our experiences, we are often able to help clients select and implement strong technology choices. Once those solutions are in place, we love to help our clients better leverage themselves to make their business more productive, more efficient or more secure.

We recently had a *10-Minute Tech Talk* about using technology to automate business. This is a secret pleasure of mine—I was thrilled when I enabled our line-of-business software to take an email message, create a service request that was attached to the client and create an activity to remind me to follow up. I had to create a basic workflow within the software and it has helped me avoid losing track of important activities which is easy to do with email. What can your software do for you? Think of it like a game and play to win!

Gaming Fun Facts!

- A computer named Deep Blue was the first to win a World Chess Championship.

- The *Monopoly* mascot used to be named Rich Uncle Pennybags, but was changed to Mr. Monopoly.

- The phrase "back to square one" mostly likely originated from *Chutes and Ladders*.

- "Oxyphenbutazone" is the highest-scoring word possible in *Scrabble*.

- *The Game of Life* was the very first board game invented by Milton Bradley, in 1860. Though he singlehandedly launched the board game industry, it was actually the only board game Milton Bradley ever invented himself.

The Business of Board Games…

Businesses have taken our love of playing games and turned it into HUGE profits. These businesses lead the way when it comes to board games:

Milton Bradley was an American business magnate, game pioneer and publisher, credited by many with launching the board game industry with the **Milton Bradley Company** in 1860. In the winter of that same year, the company released *The Checkered Game of Life*, and the game was an instant success! Throughout the game, Bradley defined success in secular business terms, depicting life as a quest for accomplishment with personal virtues as a means to that end. This complemented America's growing fascination with obtaining wealth in the years following the Civil War. This and later board games also fit the nation's increasing amount of leisure time, leading to great financial success for the company. The company maintained its family ownership for 124 years and continued to dominate the production of American games, producing such lasting favorites as *Chutes and Ladders*, *Candy Land*, *Mouse Trap*, *Trouble*, *Jenga* and *Yahtzee*.

George Parker founded his game company, **Parker Brothers**, in 1883. For many years, George designed most of the games himself and wrote all the rules. In 1906, *Rook*—their most successful card game to this day—quickly became the best-selling game in the country. During the Great Depression, a time when many companies went out of business, Parker Brothers released a new board game called *Monopoly*. It was an instant success, and the company had difficulty keeping up with demand. The company continued to grow throughout the next several decades, producing such lasting games as *Clue*, *Risk*, and *Sorry!* Both companies are now subsidiaries of **Hasbro**.

Looks like IT Radix is not the only one who likes to mix business with fun and games!