



# Information Technology

① All Systems Operational



If you plan on taking CAPTRUST issued equipment home, please fill out the form below and submit [\*\*CAPTRUST Technology Checkout Form\*\*](#)

The [Technology Orientation Presentation](#) walks new colleagues through the technology introduction given during Day 1 orientation.

### Wireless Support Help Desk

If you need assistance with your mobile phone (upgrade, replacement, repair), please call our Wireless Support Help Desk at One Source Communications.

- Wireless Support Help Desk ([helpdesk@onesource.net](mailto:helpdesk@onesource.net) or (252) 931-0222 Option 1, then 3)
- Wireless New Orders ([wirelessorders@onesource.net](mailto:wirelessorders@onesource.net) or (252) 931-0222 Option 3, then 1)

To add CAPTRUST email to your existing, operable mobile phone you will still need to contact the CAPTRUST Technology Support Help Desk. You can book a time at <https://outlook.office365.com/owa/calendar/MobilePhoneSetup@captrust.com/bookings/>

## QUICK LINKS



2023 Information Security Policy



2023 Information Security Brief



Microsoft 365 Training



How to Use Nitro Pro PDF



Knowledge Base



Mimecast Secure Message Portal



IT Overview with DOL Guidance

The **Information Technology Department** consists of dedicated employees who strive to deliver our mission every day. IT is responsible for:

- **Application Development** - Development and support of custom software that creates unique value propositions for users and clients
- **Information Security** - Policy, compliance, security configuration, and ongoing testing
- **Infrastructure** - Common technology that supports servers, the network, and end-user computing

## IT Application Development

The **IT Application Development** team creates the proprietary applications that enable CAPTRUST to deliver scalable, mission-critical capabilities. Scott Andrews leads the team.

- **CAPConnect**: Customized Microsoft Dynamics 365 Customer Experience (CE) that supports over 300 custom data entities and workflows that cover our business across wealth and institutional.
- **Dynamics for Finance**: Integration of Dynamics for Finance with Dynamics CE and Concur.
- **BlackDiamond & WealthView** integration.
- **SharePoint Online**: Customized workflows.
- **Quarterly Reporting (QRGs)**: Automated production and publishing of client-focused reporting (DC, DB, NQ, and E&F)
- **Blueprint & Blueprint Reporting**: Retirement-readiness application with automated reporting of participation

## IT Information Security & Network

The **IT Information Security and Network** team is responsible for networking, phones, information security policy, compliance, security configuration, and periodic testing. Nick Brezinski leads the team.

- **Network**: WAN and LAN service across all facilities. Each facility is served with redundant data circuits to help achieve near-zero downtime. Non-office workforce is served with secure connection via ZScaler.
- **Phones**: Phone service across all facilities including centralized voicemail, voicemail to email, 5 digit dialing, toll-free, and toll service. Conference room and common area phones.
- **Governance, Risk & Compliance**:
  - **Policy driven**: All employees receive comprehensive information security training, ongoing anti phishing training, and acknowledge information security policy.
  - **IT standards**: IT standards are based on those of the National Institute of Standards and Technology (NIST 800-53 and 800-171) and SANS Institute.
  - **Supplier Management**: We conduct supplier due diligence on new vendor relationships and recertify vendors annually.

## IT Infrastructure

The **IT Infrastructure Team** manages the common technology that supports servers, the network, and end-user computing. Ken Carter leads the team.

- **Servers, storage, and virtualization** housed in CAPTRUST's main data centers: Azure and TierPoint North Raleigh.
- **Office 365 and Azure** configuration and server administration
- **End-User Computing** which includes Windows, Office 365 and the Office Suite, Desktops, Laptops, and Tablet Computers and mobile phones. The Hardware and Integration team builds and repairs computers and the Technology Support team provides assistance to users who need technology support.