



Toolkit Template Information Technology Systems

Objective: This template has been developed to record critical basic information related to your business' clients and any unique client strategies, processes or arrangements related to a client.

Information technology is no longer an option for any business. In fact, for many businesses if the technology systems stopped working the company would also have to stop working or at least operate in a seriously handicapped manner.

This template is to assist in the organization of the information needed to help keep the systems running.

Hardware Manufacturers

- Company Name
- Customer number
- Company Address
 - Street
 - City
 - State
 - Zip code
 - Phone number
- Contacts
 - Name
 - Title
 - Email
 - Telephone
 - Preferred contact method and frequency

If there are other contacts please repeat the above information
- Contract Terms
 - Pricing
 - Discount Amount
 - Minimum Order Size:
 - Maximum Order Size:
 - Payment Terms:
- Model Number
 - Quantity
- Serial Numbers



- Date of purchase
- Warranty expiration
- Service contract purchased
- Contract expiration date
-

Repeat for every piece of hardware

Software Vendors

- Company Name
- Customer number
- Company Address
 - Street
 - City
 - State
 - Zip Code
 - Telephone
- Contacts
 - Name
 - Title
 - Email
 - Telephone
 - Preferred contact method and frequency

If there are other contacts please repeat the above information

- Software Package Name
 - Version Number
 - Purchased
 - Current version number from updates
 - Quantity
 - License Number(s)
 - Date(s) of purchase
 - License expiration
 - Warranty expiration
 - Service agreement purchased
 - Service agreement number
 - Service agreement expiration date
 - Pricing terms



- Discount percentage
- Quantity tiers
- Product exclusions
- Specific conditions

Repeat for every software package and version

- Software update policy and procedures
 - How is a new release tested?
 - Who is responsible for testing?
 - Who approves the testing to allow it to go to rollout?
 - How is the new release rolled out once it passes testing?
 - Is a plan in place to roll it back in case of problems?
 - Has the plan been tested?
- What is the policy regarding use of company assets for personal use, such as going to personal email or online shopping or going to non-business websites?
- Is Bring Your Own Device, BYOD, permitted?
 - If so, what is the policy on the use of the device and ownership of the data?
 - Can the device be remotely wiped in case of loss or theft?
 - Has each employee signed the policy clearly stating that the firm can wipe the device and personal information, music and photos may be lost?
- Are permissions to different software packages and systems granted on a need only basis or do all employees have access to all systems?
- Are there clearly defined roles and responsibilities for each business procedure?
 - Are the specific hardware and software needs for each role known and documented?
 - Are permissions granted to those systems based upon the role?
- Are employees trained in the applicable roles and responsibilities?