Company Name:

Date:

BUSINESS TECHNOLOGY INVENTORY & ASSESSMENT

PLANNING TEMPLATE CREATED BY:





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Applicable Infrastructure Licenses, Warranties & Renewals: Device(s)/License(s) License Date Renewal Date Warranty Expiration in the second secon	Date
Switch(es) Applicable Infrastructure Licenses, Warranties & Renewals: Device(s)/License(s) License Date Renewal Date Warranty Expiration in the second	
Device(s)/License(s) License Date Renewal Date Warranty Expir Priority items to address:	
Priority items to address:	
Priority items to address:	
Priority items to address: .ower priority opportunities for improvement:	iration
ower priority opportunities for improvement:	

	Software Name or Service Provider	Installation Date	Renewal/Upgrade Date
AntiVirus			
Advanced Malware Protection			
Web-Filtering			
Email Filtering			
Intrusion Protection & Detection Systems			
applicable Security Lic	enses, Warranties & Rene	ewals:	
Device(s)/License(s)	License Date	Renewal Date	Warranty Expiration
riority items to address	•		
ower priority opportun	ities for improvement:		
ower priority opportun	ities for improvement:		
ower priority opportun	ities for improvement:		
ower priority opportun	ities for improvement:		
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ower priority opportun	ities for improvement:		



Data location:		Back-Up Type:	
Cloud		☐ File backu	p
Service provider	:	☐ Image bad	ckup
	del: ate: cacity: blete all details above)	Hourly (clo	and circle location) oud / local device) hrs (cloud / local device) od / local device) oud / local device) ud / local device)
	censes, Warranties & Rene		
Device(s)/License(s)	License Date	Renewal Date	Warranty Expiration
Priority items to address	s:		
Lower priority opportun	ities for improvement:		

>>)

Remote Access, Email, & Messaging

Remote Network Access	: :		
Virtual Private Ne	twork (VPN)	Remote Desktop	Protocol
Connection Nan		Application:	
Remote Communication	n:		
	at		
Application/Servi	ce Provider:		
Email Domain(s) & Host(s	5):		
File Share:			
Email Encryption	on:		
Applicable Remote Acc	ess, Email, & Messagin	g Licenses, Warranties & Rer	newals:
Device(s)/License(s)	License Date	Renewal Date	Warranty Expiration
Priority items to address:			
Lower priority opportunit	ies for improvement:		



Software & Other Applications

Software or Application Name(s)	Hosted or On-Premise	Install or Subscription Date	Renewal Date
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		

Software & Other Applications (cont'd)

Software or Application Name(s)	Hosted or On-Premise	Install or Subscription Date	Renewal Date
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
	☐ On-Premise ☐ Hosted		
Priority items to address:			
Lower priority opportunitie	es for improvement:		



Internet Service Provider(s):

	Provider	Bandwidth	Contract Start Date	Renewal Date
Primary ISP				
Secondary ISP				

Phone Service Provider:

	Name	# of Lines	Contract Start Date	Renewal Date
Carrier				

Phone System Devices:

Make/Model	Serial Number	Installation Date	User or Location

Phone System Warranty/Maintenance/Service Contract:

Provider Name	Contract Start Date	Renewal Date

Priority items to address:		
Lower priority opportunities for imp	provement:	



Mobile Carrier(s):

Name	# of Lines		ontract Start Date	Renewal Date	
Mobile Devices:					
Type of Device	Make/N	Model	Warranty Expiration	n User	
Phone Tablet Other:					
Phone Tablet Other:					
Phone Tablet Other:					
Phone Tablet Other:					
Phone Tablet Other:					
Phone Tablet Other:					
Phone Tablet Other:					
Priority items to address:	'			'	
Lower priority opportunitie	es for improvement:				



Audio & Video Teleconferencing:

Application Name or Service Provider	Installation or Service Start Date	Renewal Date	Other Details	

A/V Teleconferencing Equipment/Device(s):

Make & Model	Installation Date

Display(s) & Projector(s):

Make & Model	Installation Date

Other A/V Equipment (Interactive Whiteboards, Control Systems, Document Cameras, Streaming Equipment, etc.):

Type of Device/Equipment	Make/Model	Installation Date	Other Details

Applicable A/V Licenses, Warranties & Renewals:

Device(s)/License(s)	License Date	Renewal Date	Warranty Expiration



	,		
Priority items to address:			
Lower priority opportunities for in	mprovement:		
(>>) Copiers & Prin	ters		
Service or Managed Print Contr			
service of Mariagea Film Com	der.		
Vendor Name	Contract Includes	Start Date	Renewal Date
	☐ Device Support &		
	Maintenance		
	Device Lease		
	☐ Toner ☐ Paper		

Other: _____



Devices:

Make/Model	Function(s)	Installation Date	Covered Under Contract
	 □ Print □ Copy □ Scan □ Fax □ Other: 		☐ Yes ☐ No
	 □ Print □ Copy □ Scan □ Fax □ Other: 		☐ Yes ☐ No
	 □ Print □ Copy □ Scan □ Fax □ Other: 		☐ Yes ☐ No
	 □ Print □ Copy □ Scan □ Fax □ Other: 		☐ Yes ☐ No
	 □ Print □ Copy □ Scan □ Fax □ Other: 		☐ Yes ☐ No
Priority items to address:			
Lower priority opportunities for imp	rovement:		





Site	Hostname	Description	IP Address	Ext. IP Address	Model	Operating System	Serial Number	Est. Install Date	Est. End of Life Date

Priority items to address:	Lower priority opportunities for improvement:				

Workstations

Site	Hostname	Description	IP Address	Ext. IP Address	User or Location	Model	Operating System	Serial Number	Est. Install Date	Est. End of Life Date



Site	Hostname	Description	IP Address	Ext. IP Address	User or Location	Model	Operating System	Serial Number	Est. Install Date	Est. End of Life Date

Priority items to address:	Lower priority opportunities for impr	ovement:

Compliance

Required Compliance Regulation(s):				
General Data Protection Regulation (GDPR)	Gramm-Leach-Bliley Act (GLBA)			
☐ Health Insurance Portability &	Sarbanes-Oxley Act (SOX)			
Accountability Act (HIPAA)	☐ Federal Information Security Modernization			
Payment Card Industry (PCI)	Act (FISMA)			
Family Educational Rights & Privacy Act (FERPA)	Other:			
Date of Last Compliance Audit:				
Designated Compliance Officer:				
Priority items to address:				
Lower priority opportunities for improvement:				



No Service Contract − on-deService Contract (select all t	emand troubleshooting and that apply)	support (billed hourly)
Start Date	Renewal Date	
Pre-paid block of Unlimited support. Network/device monitori	·	
Items supported by vendor (select PCs Macs Tablets/Mobile Devices Servers Priority items to address:	all that apply): Network & Security Devices Printers & Copiers Phone System	□ Vendor Management□ Software Updates□ Anti-Virus & Cybersecurity□ Compliance Audits
Lower priority opportunities for impr		



Priority Items to Address this Year

Action item	Responsible party	Due date



Future Opportunities for Improvement

Action item	Responsible party	Target start date
1	1	