



Technology Inventory Worksheets

There's a lot to document on a network, but you don't have to do it all to gain some benefit. The more you have documented and up-to-date, the easier it is to work with a consultant, plan for technology changes, share the burden of supporting your technology, or cover for the person who normally does all your technology stuff (that's probably you).

Some general rules for using these worksheets:

- Once you've filled a section out, KEEP IT UP-TO-DATE. Don't skip the paperwork when you make changes, or you'll regret it.
- Always put the current completed/updated date on a document.
- Record the name and position of the person filling out the form, and the names of people who provided information in the document (this makes updating and clarifying information much easier).
- There is some duplication between the sections. You only need to record information in one place, but whichever one you choose, delete the question from the other place so it's easy to keep the documentation consistent.
- If you need more space, copy tables or sections as necessary.
- Feel free to copy the worksheets into another format.
- If you keep these documents on a hard drive (which makes editing and updating easier) ALWAYS keep a printed copy too (keeping a copy off-site isn't a bad idea either).

We've provided the worksheets in separate sections, with the ones that are normally most critical first. Don't feel like you have to do everything at once, or that you have to do them in the order we've provided.

These worksheets don't cover everything. The best way to use them is to complete the ones that will be most useful to you, add in other information that is important to you, and, again, keep it up-to-date.

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1 External Services

About this Section

This is the most critical piece of documentation because, unlike virtually all the other information, if you don't have this written down, it's possible you may lose it altogether. You can always go to your computers to find out what they are, but if you don't write down who you have a support contract with, you may not know whom to call when your server's hard drive crashes or your Web site goes down.

Print this section out, and make sure key staff have an up-to-date copy.

Domain Registration

Item	Assessment
Domain Name	
Registrar Name	
Registered Admin Contact	
Registered Technical Contact	
Registration Login Information	
Contact E-Mail	[as listed by provider]
EXPIRATION DATE	

E-Mail Hosting

Item	Assessment
Provider Name	
Provider Contact Info	
Primary Account ID	
Administrator	
Contact E-Mail	[as listed by provider]
Number of accounts	
E-Mail domain	
Spam protection / filtering	
Cost	
Notes:	

Web Site/Domain Hosting (complete this section for each Web site/domain host)

	Assessment
Web hosting Provider Name	
Provider Contact Info	
Primary Account ID	
Administrator & Admin Capability	
Website URL	

Bandwidth / Storage	
Cost	
Notes:	

External Support Provider (complete this section for each External Support Provider)

	Assessment
Role	
Name	
Contact Number(s)	
Schedule/Available Hours	
Emergency call out?	No / Yes – Details:
Person at your organization who manages day-to-day contact:	
Person at your organization who signs off on payment/expenses etc.:	
Record of work performed is kept at:	
Back up support provided by	
Notes:	

Other

Item	Assessment
Service Description:	
Hosting Provider Name	
Provider Contact Info	
Login Information	
Cost	
Other	

2 PC Inventory

About this Worksheet

This is often one of the most daunting pieces (along with the software inventory), because it can seem so big. But it's a great tool to have once you've got it.

Here are some ways that might be more manageable for you:

- Inventory each workstation the next time you do any troubleshooting, configuration, or installation on it.
- Set time aside each week to inventory one-tenth of your network.
- Get a volunteer to inventory systems.
- Arrange with your manager to swap a regular workday for a weekend workday, and do it all in one fell swoop.
- There are a number of tools that automate this function with varying degrees of success. Check out the suggested tools from the TechSoup discussion forums:
<http://www.techsoup.org/forums/index.cfm?fuseaction=read&forum=2016&id=51477&cid=117&mid=176462>

Last Updated:

#	Network ID (Main User)	Make and Model	OS	RAM	CPU Type	CPU Speed	Hard Drive Total/Free	Applications	Antivirus
1									
2									
3									
4									
5									

#	Notes
1	
2	
3	
4	
5	

3 Server Inventory

About this Worksheet

This is just a PC Inventory for your server. It's a different form because there's normally more specialized information to record.

HARDWARE:

Item	Assessment
Make Model	
Serial Number	
CPU	
RAM	
Hard Disk(s)	
RAID Configuration	
Floppy Disk	
NIC	
SCSI Card	
CD-ROM	
Battery Backup	

SOFTWARE:

Item	Assessment
Server Software Version # # and type of Client Access Licenses (CALs)	
Server Role	[EXAMPLES - File Server, Exchange Server, Donor Perfect Server, Web Server, Intranet Application Server, E-Mail Server, Back-Up Server etc.]
Domain Name	
Computer Name	
Server Applications Version # # of Client Access Licenses (CALs)	[If applicable]
Install Directory	
Source File Location	
Swap File	
Protocols	
Virus Protection	
Other	

4 Back-Up Configuration

About this Section

This is a generic form that should work with virtually any back-up process. But if your back-up system came with another form (maybe in the software manual), that will probably be easier to complete.

Knowing what your back-up system is and who should do what will help you test and maintain it, especially if the one person responsible for it is no longer available. These details can also be invaluable if you need to recover from a catastrophic loss.

SOFTWARE

Item	Assessment
Back-up Software & Version	
Staff Roles	[Who swaps tapes, checks that it ran etc.]
Backed-up Paths	
Database Backup Method	
Day	Back-up Details
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

TAPE ROTATION: [Describe]

HARDWARE

Item	Assessment
Backup Device Type/Make/Model	

Driver Version	
Notes:	

DATE RECOVERY LAST TESTED:

5 Software Inventory

About this Worksheet

Software inventories are daunting because you need to know not just what software you have where, but also what licenses you have, what machines they're attached to, and where your proof of licensing is.

Record the software on each machine when you do your PC inventory. Then you can compare the licensing you have with the software you're using.

Few small organizations get audited for software licensing compliance, but being unable to quickly document your licensing could involve your organization in a costly legal exercise. Generally, what a software auditor will want to see is proof of purchase, so make a photocopy of the receipt or the letter from a donor stating the transfer of the license (and a copy of their receipt if possible), and keep that with the paper license in a fire-proof safe.

Digital Assets

For license type, record OEM licenses attached to particular machines separately from transferable license; for server based software, note whether access licenses are for concurrent connections, each user, or each device. If license is Open Source, specify what type. License Type and # Licenses will not be appropriate for all categories.

License certificates and copies of receipts stored at:

Productivity Applications Used

Item	Application and version #	License Type	# Licenses
Office Productivity			
E-Mail			
Database			
Accounting			
Program Management			
Donor / Fundraising			
Other:			

Enterprise Applications Used

Item	Application and version #	License Type	# Licenses
Client Tracking			
Staff Timesheets			
Intranet			
Shared Calendaring / Resource Scheduling			
Help Desk			
Other:			

Communications & Graphics Capabilities

Item	Application and version #	License Type	# Licenses
Workstation Capability			
Software Used			
Staff Skills			
Digital Collateral			
E-Mail list tools			
Other:			

You could also record digital files that you own the copyright to, such as your logo.

6 Physical Security Risk Assessment

About this Worksheet

This worksheet is a brief introduction to some of the first things to start thinking about when it comes to physical security for your organization. It is not a replacement for a thorough security audit.

DO NOT write your passwords in this document or store them in an unprotected place (such as on a computer or pinned to your wall). For important passwords that the organization needs to be able to access should a key person no longer be available, store them along with other important documents in a sealed envelope under lock and key.

Item	Assessment
Password-protected workstations	[Do people need a password to log on to your computers?]
Private computer access	[Can clients or others sit down at your computers easily?]
Screen-saver password usage	[Are your computers set to put up a password-protected screen-saver or other lock-out after a set period of time?]
Access to server equipment	[Is your server physically accessible to the general public, clients, all staff? Is it visible? Is it locked away?]
Network share security	[Are the shared resources on your network restricted to authorized users]
Password Rules	[e.g. Minimum length, mix of character types, lack of repetition, expiration dates]
Other:	

7 Staff Skills

There are many ways to inventory staff skills, for a quick and easy self-assessment-based approach, CompuMentor recommends you use the staff skills tools that are a part of NPower's TechSurveyor:

<http://techsurveyor.npower.org/techsurveyor/>

8 Network Inventory

About this Worksheet

This information can be very useful for a consultant trying to track down a network problem, especially over the phone. It will also be handy when you upgrade or expand your network. Knowing that you only have two ports free on your switch is important if you plan to add another four users.

We also suggest making a drawing of your network.

Network Hardware

HUBS / SWITCHES

Make/Model	Speed	Location	Ports		IP ADDRESS	Connected To
			Total	Free		

ROUTER

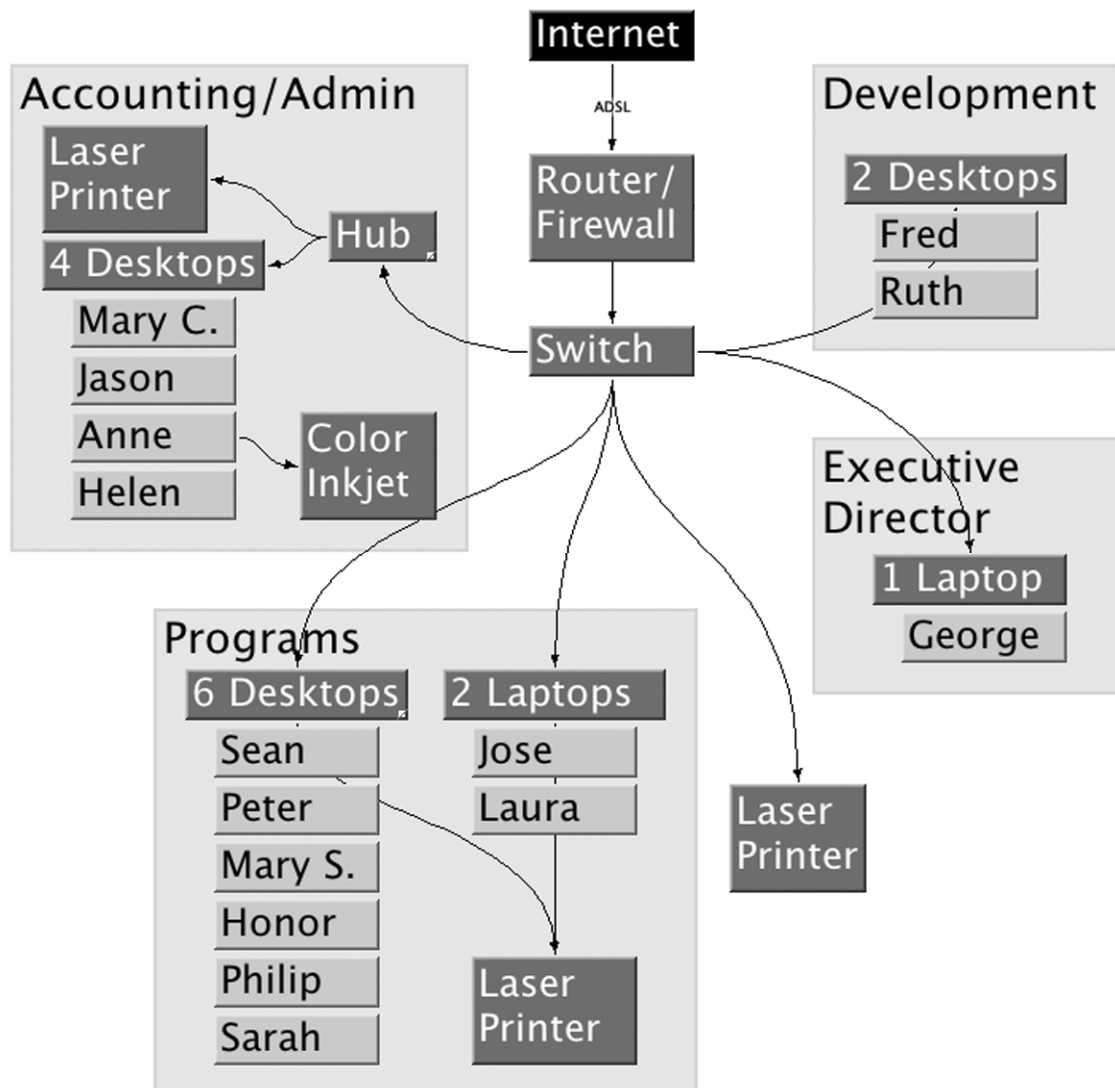
Make/Model	Internal IP		External IP		Purpose	Remote Access
	IP		IP			
	Subnet Mask		Subnet Mask			
	Gateway		Gateway			

INTERNET CONNECTION HARDWARE

Make/Model	Service Type (e.g. Dial up)	IP Type (e.g. Static)	Speed (e.g. 56Kb)	Notes

Sample Network Drawing

A network drawing is useful when documenting your network set-up.



9 Printers and Peripherals Inventory

About this Worksheet

This is an inventory worksheet for your printers, scanners, digital cameras, PDAs, and other peripherals. Only fill in a column if it is relevant. We suggest you keep all similar peripherals together.

Type and Model*	Share Name	Physical Location	IP Address	Security

* e.g. Printer, HP 4150; or Digital Camera, Kodak DC65

10 Technology Management Questionnaire

About this Worksheet

Sections 10.1 through 10.4 of this worksheet are for recording who has responsibility internally for technology and what standards you have regarding technology use. This information can be a useful reference for other staff members, especially new ones.

Sections 10.5 through 10.8 are designed to be useful for planning for the future. With these sections, the act of pulling together the documentation you have and thinking about the way you manage technology is more important than having the written answers available at a later date.

Admin

Date completed/updated:

Person responsible for ensuring completion:

Others involved in providing information (names and positions):

10.1 Roles and Responsibilities

The following list of roles and responsibilities are inherently present in an organization that possesses any level of computing technology. Please write in the names and titles of the people who perform these tasks for your organization. Some roles or responsibilities may be the purview of a committee (for instance, the senior management team or the budget committee) or an outside company. If this is the case, please enter the team or company name and provide details in the space provided below the table.

WHO IS RESPONSIBLE FOR:	Individuals (names and titles), or Committee/Team/Company name
Setting priorities, recommending budget items, and establishing policies and procedures	
Establishing the future direction of technology usage the organization	
Managing the network, server, user accounts, and backups	
Ensuring individual workstations are properly configured and are running properly	
Ensuring that the database is accessible to users, remains secure, and is running	
Ensuring that backups are executed and are verified and ensuring that the proper files are being backed up	
Testing backups, verifying that appropriate files are being selected, and performing restoration	

tasks. Ideally, this is a different person than the back-up administrator	
Resolving day-to-day technology issues	
WHO IS RESPONSIBLE FOR:	Individuals (names and titles), or Committee/Team/Company name
Establishing the direction and functionality of the Web site and administering basic content updates	
Setting up and terminating e-mail accounts, resetting passwords, implementing e-mail forwarding, etc.	
Tracking software usage and keeping records to ensure software license compliance	
Overseeing technology skills and training	
<i>OTHER (List other roles and responsibilities, such as "data entry," people on the technical support staff have; this makes it clearer if people are overburdened)</i>	

Committee/Team/Company details:

For committees and teams, provide the name of the committee or team and the names and positions of individual members.

For external companies provide the name of the company and contact details.

10.2 Job Descriptions

Do any members of staff have technology tasks or responsibilities written into their job descriptions?
YES/NO

If so please complete this table for each :

Name and Position of Staff Member	Written Job Description (tech tasks/responsibilities only)

10.3 Policies

This section is about policies your organization has regarding technology use.

For each potential policy area, decide if the area is applicable to your organization. For instance, if you don't have a lab, you'll circle "No" next to "lab usage guidelines", and if you have any staff who use technology in any fashion you'll check "Yes" next to "Statement of technology skills required for each position."

Then decide if you follow and/or document policy in each area. Check "In use" if users generally adhere to a consistent practice across the organization in the policy area. Check "Written" if you have any written policies in that area, whether or not users follow them.

POLICY AREA	Applicable	In use	Written
Statement of technology skills required for each position	Yes / No		
Information access, usage, and distribution (data privacy)	Yes / No		
File sharing and organization	Yes / No		
E-Mail & Internet usage policy	Yes / No		
Password security policies	Yes / No		
Licensing and copying software	Yes / No		
Remote access policy	Yes / No		
Lab usage guidelines	Yes / No		
Document (file) retention	Yes / No		
Treatment of laptops and other mobile technology	Yes / No		
Personal use of organizational computer resources	Yes / No		
Volunteer access to computers and network	Yes / No		
Public or client access to computers and network	Yes / No		
Other (please provide details):			

10.4 Procedures

Record whether you follow consistent procedures for common technology tasks and whether those procedures are documented.

For each potential procedure, decide if the area is applicable or not. For instance, if you don't have a network, you'll circle "No" next to "How to log into the network", and if you have any databases at all you'll circle "Yes" next to "How to access databases."

Then decide if you follow and/or document procedures in each area. Check "In use" if consistent procedures are generally followed, whether or not they are written down.

Check "Written" if you have documented procedures, whether or not users follow them.

Procedure	Applicable	In use	Written
How to access databases	Yes / No		
How to correctly enter data into databases	Yes / No		
How to use databases (other than data entry)	Yes / No		
How to access e-mail	Yes / No		
How to create new e-mail users	Yes / No		
How to delete e-mail users	Yes / No		
How to run backups	Yes / No		
How to test backups	Yes / No		
How to restore backups	Yes / No		
How to log into the network	Yes / No		
How to add users to the network	Yes / No		
How to delete users from the network	Yes / No		
How to set up file sharing	Yes / No		
How to organize files on the file-server	Yes / No		
How and where to store files (documents) locally	Yes / No		
Updating virus definitions	Yes / No		
How to patch operating systems and applications	Yes / No		
How to request technology support	Yes / No		
Other (provide details):			

10.5 Annual Technology Budgeting

Do you have a line item for technology in your chart of accounts? Yes / No
If yes, what expenses are included?

Do you have a detailed technology budget for this year? Yes / No
If yes, how much is it?

Have you evaluated replacement and upgrade costs for your hardware and software? Yes / No

Have you evaluated your costs for outside technology consultants, software subscriptions, Internet services (DSL, hosting etc.), and other periodic technology expenses? Yes / No

Have you evaluated the costs of toner and other consumables related to your technology? Yes / No

Have you evaluated the cost of technology to add one more user to your setup? Yes / No
If yes, how much is it?

Do you have trouble raising funds to cover technology costs? Yes / No

Do you calculate the program portion of your technology expenses? Yes / No
If yes, how do you do this?

10.6 Staff Skills and Training

How do you evaluate staff technology skills? (Please circle or bold.)

We don't *Self evaluation* *Peer evaluation*

Manager evaluation *Independent evaluation*

How do you evaluate the technology skills individual staff require to do their jobs? (Please circle or bold.)

We don't *Self evaluation* *Peer evaluation*

Manager evaluation *Other*

Do you identify super users (staff who are especially proficient and whom other staff can turn to for support) for your important software programs? (Please circle or bold.)

For all programs *For most programs* *For a few programs* *No*

How do staff access training for technology related skills?

Do staff receive training on technology when they join your organization?

Yes / No

10.7 Technology Support and Troubleshooting

Who do users call on for first-level support?

Who escalates support calls outside of the organization (e.g. decides to call in a consultant or access contractual support services)?

Do you use help-desk software (software that tracks support requests) or document user problems and the outcome? Yes / No

If so, please describe:

Do you have a triage sheet or other documentation to help users troubleshoot common issues? Yes / No

How often is your organization unable to resolve technology problems? (Please circle or bold.)

Most weeks

Most Months

A few times a year

Almost Never

10.8 Data

How do you collect funder/donor data? (Please circle or bold.)

We don't

With paper and pen

Word documents

Spreadsheets

Off-the-shelf database

Customized off-the-shelf database

Self-built database

Other (Please describe)

How do you generate analytical data information for funders? (Please circle or bold.)

- *Generally estimate, or extrapolate from incomplete records*
- *Manually dig through different data sources for required information*
- *Generate information from current information systems*

How do you collect program data? (Please circle or bold.)

We don't With paper and pen Word documents Spreadsheets
Off-the-shelf database Customized off-the-shelf database Self-built database
Other (Please describe)

Is program data used? (Please circle or bold.)

To report to funders To facilitate program delivery To improve programs

If you use databases, do you have written documentation for them on:

Technical specifications (such as the data dictionary)?	Yes / No
User documentation (how users interact with the software)?	Yes / No
Process documentation (how it is used in your organization)?	Yes / No

If you use databases, do you have access to a staff person, consultant, or vendor who can troubleshoot problems?

Yes / No