

Define your needs: Lets understand your current IT infrastructure and requirements

ITS Brief – framework to IT success series

IThinkSource has provided this brief to assist you in the management of your firm's technology infrastructure. If you have any questions or would like further assistance, please reach out to us at your convenience (www.ithinksource.com). IThinkSource is a full service, professional, technology support firm providing technology support and guidance to our clients in Orange County. *Legal notice: The contents of this brief provide general guidance on specific technology related topics, always have your technology plans reviewed by a professional before implementation.*

As a part of your technology business continuity plan, the firm's technology infrastructure should be fully documented. A complete and current copy of this document should reside within the business (with proper backup and security access) and accessible to management staff.

This document is also a valuable resource when investigating partnering with a new IT services provider. This document quickly allows the prospective IT partner a good understanding of your technology, but also allows them to provide a response to their expertise in supporting your environment.

The list provided is not a comprehensive checklist, use this as a guide to organize and capture the technology infrastructure needed. In infrastructure documents can range from general in nature (list of equipment, make, model, list of software used, etc.) to very specific (Server specifications, reserved IP addresses, switch VLAN configurations, etc.). The level of detail is up to you, or may be driven by specific industry security standards. In general your IT infrastructure document should be detailed enough to replace in the event of disaster. You will need to add or remove items from the list provided depending on your specific configuration and needs.

Note: you are not alone on this task! If you need assistance to complete any of the items in this section, you can utilize your current IT partner as a resource (this is a legitimate and common practice to document your current IT infrastructure, your current IT partner can/should assist you with this task!). If you do not have a current IT partner, or you would rather not involve your IT resource, you can reach out to IThinkSource. We would be happy to work with you to get Step 1 completed!

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1. Network Architecture:

- Build a simple diagram of your network layout, including routers, switches, firewalls, and wireless access points.
- IP address scheme and subnetting information (optional)
- Network bandwidth and traffic patterns (optional)
- VPN configurations for remote access, if applicable.
- Details of any VLANs or segmented networks.
- Information about any WAN configurations/connections

2. Hardware Inventory:

- List of servers, including general specifications (Make/Model, storage, general use/VMs).
- Inventory of workstations, laptops, and mobile devices.
- List of peripheral devices such as printers, scanners, and copiers.
- Networking equipment summary (make, model).
- Document any additional equipment utilized (UPS units, WAN hardware, wireless, backup devices, etc.

3. Software Environment:

- List of operating systems in use (Windows, macOS, Linux).
- Inventory of installed software applications, including support status.
- Server virtualization platforms (VMware, Hyper-V, etc.) and basic configurations.
- Database management systems and versions.
- Collaboration tools (email, messaging, video conferencing).
- Other key software in use
- Include copies of software agreements, renewals, contracts.
- Include licensing information for server Operating System, Client Access Licenses, Database management systems, etc.

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4. **Data Storage and Backup:**

- On premise server storage in use (platform, amount of data).
- Backup systems and strategies (on-premises, cloud-based, hybrid).
- Backup retention policies and schedules.
- Disaster recovery plans and procedures.
- Status of current backups

5. **Security Measures:**

- Overview of current security policies and procedures.
- Details of antivirus, antimalware, and endpoint protection solutions.
- Is a SPAM filter in use? Vendor?
- Firewall configurations and rulesets (optional)
- Is Intrusion detection/prevention systems in place? General information.
- Security assessments or audits conducted.

6. **Cloud Services:**

- List of cloud services and providers used (e.g., AWS, Azure, Google Cloud).
- Configuration details for cloud-based applications and services.
- Cloud security measures in place, backup measures in place.

7. **Monitoring and Management Tools:**

- Are any tools used for network monitoring and performance management.
- System management and remote administration tools.
- Patch management solutions and patching schedules.
- Asset management and inventory tools in use.

8. **Compliance and Regulatory Requirements:**

- Relevant compliance standards (HIPAA, GDPR, etc.) applicable to your industry.

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	<ul style="list-style-type: none">• Documentation of compliance efforts and audits.
9. Budget and Resource Constraints:	<ul style="list-style-type: none">• Determine/document current IT budget allocations and spending breakdown.• Resource constraints such as staffing limitations or skill gaps.• Priorities and timeframes for any specific/planned technology investments and upgrades.
10. Business Objectives and Growth Plans:	<ul style="list-style-type: none">• Current business goals and strategic initiatives.• Expected growth projections and expansion plans.• Any known technology constraints to support future business needs.
11. IT Partner	<ul style="list-style-type: none">• Define any specific must have skills or expertise provided/needed.• Based on the defined IT budget, document current (and possibly desired) payment fees/structure for your IT support partner.• Include a copy of your current IT partner contract/agreement, off hours contact process, and contacts for their management

Final recommended key step: With the above infrastructure documented, now go back and select the items that are **key** to your business operations. Bold these items (or create a separate hot list) as these are the key functions (must have) that need to be; supported, secure, and identified as high priority, to ensure effective business operations.