

Firm Process Optimization Snapshot Inventory
Information Technology Infrastructure Questionnaire

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GENERAL INFORMATION

Firm Name:	Primary Contact:
Specific Office if applicable:	Firm Phone Number:
Street Address:	Emergency Phone #:
Member of a CPA Firm Association?:	Emergency Email:

TECHNOLOGY TEAM	Name	Email Address	Annual Hours Allocated to IT
Managing Partner:			
Technology Partner:			
Network Administrator:			
Other IT Staff:			
Other IT Staff:			
Training Coordinator:			
Firm Administrator:			
Tax Liaison:			
Audit Liaison:			
Client Services Liaison:			

Employees:
Offices:
Expected Growth %:
Planned Acquisitions:
Gross Revenue:
Write-Down %:
Total Hours:
Total Billable Hrs:

External Network Integrator:	Annual Fees:
Other External Consultants:	
(Security, Web, Phone, etc.)	

NETWORK INFRASTRUCTURE

File Server Brand/Name	Primary Usage (Print/Comm/WTS)	Processor(s)/RAM	Total Disk Space Available/Used	Operating System	# User Licenses	Date Placed in Service
1.		/	/			
2.		/	/			
3.		/	/			
4.		/	/			
(expand as necessary)						

Switches/Hubs:	Brand:	Model:	Speed(1000/100/10):	# Ports:	Cabling/Cat:
Uninterruptible Power Supply:	Brand:	Model:	Installed:	Last Tested:	
Internet Firewall:	Brand:	Model:	Open Ports:	Last Tested:	
Backup Device (Disk/Tape):	Brand:	Model:	Std. Capacity:	Compressed:	
Backup Software/Offsite Service:		Version:	Backup Frequency:		
Antivirus on Server:		Update Frequency:		Backup Tape Capacity:	
Anti-spam/Remailer Management:				Volume of Data Backup:	
Other/Utilities:	Email Remailer Service:			Backup Start/Stop Time:	

FIRM COMMUNICATIONS

	Vendor	Annual Fee	Contract Bandwidth:	Tested Bandwidth:
Internet Broadband Provider:				
Redundant Broadband Provider:				
VPN/WAN Connectivity:				#Remote Users:
WiFi Access Points/Location:	# Users:	WPA2 Installed:	Dual Broadband Router (Y/N)?	
Digital Cellular Provider:	# Users/Cards:	Annual Fee:		
Phone System:	# Lines:	Annual Fee:		
#SmartPhones Supported:	Tablets Supported:		Video Conferencing Need?:	

FIRMWIDE PRODUCTIVITY APPLICATIONS

	Vendor	Annual Fee	# Users	# Licenses	Version/Cloud?	Firm Expert:
Practice Management (T&B):						
CPE Tracking:						
Internal Accounting:						
Firm Payroll:						
Document Management:						
Client Portal:						
Firm Workflow:						
Email/Groupware:						
Contact Management/CRM:						
Intranet Maintenance:						
Website Maint/Provider:						
Internet Site Monitoring:						
IT Support Database:						
Microsoft Office Suite:						
Adobe Versions:						
Adobe Annotation Tools:						
(expand as necessary)						

TAX APPLICATIONS

	Vendor	Annual Fee	# Returns/Clients	# Users	# Licenses	Version/Cloud?
Individual:						
Partnership:						
Corporations:						
S-Corporations:						
Non-Profit Returns:						
Fiduciary/Estate and Gift:						
Tax Planning/Projections:						
Tax Research:						
Tax Forms:						

Depreciation:					
Due Date Monitoring:					
Source Document Scanning:					
Tax Workflow Tool:					
W2/1099 Creation:					
Other:					

AUDIT APPLICATIONS/TOOLS	Vendor	Annual Fee	# Engagements	# Users	# Licenses	Version/Cloud?
Workpaper Engagement Container:						
Workpaper Trial Balance (if separate):						
Workpaper Program System:						
Audit Research/Regulations:						
Audit/Data Extraction Software:						
Audit Scheduling:						
Analytics (RMA, iLumen, ProfitCents)						
Describe usage of USB/Portable Storage:						
Describe Field Printers/Scanners/Other Equipment:						

CLIENT SERVICE APPLICATIONS	Vendor	Annual Fee	# Clients	# Users	# Licenses	Version/Cloud?
Client Write-Up:						
Depreciation:						
Client Payroll:						
Amortization:						
Client Supported Accounting Apps.:						
Other:						

FIRM TECHNOLOGY POLICIES	(Yes/No)
Written Technology Budget:	
Written Disaster Recovery Plan:	
Password Policy:	
Internet/Computer Usage Policy:	
Digital Document Retention Policy:	
Laptop/Smartphone Security Policy:	
Describe Server Room Air Conditioning/Monitoring:	
Describe Server Room Physical Security:	
Describe Building Access Physical Security:	

PRODUCTION EQUIPMENT: Copiers, Printers, Scanners, Fax, Shredders			Max. Pgs/Minute Print/Scan/Copy	Networked?	Color (Y/N)?
Brand/Model	(P)Print,(S)Scan,(C)Copy	User: Dept. or Staff Name			
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
<i>(expand as necessary)</i>					

INDIVIDUAL WORKSTATIONS		SD or Hard Disk/	Windows Oper. Sys.
Department/User Name	Brand/Model Number	Processor Speed/RAM	Size in GB (7, 8.x, 10)
			# of Monitors/Size(s)
			Date Placed in Service
1.	/	/	/
2.	/	/	/
3.	/	/	/
4.	/	/	/
5.	/	/	/
6.	/	/	/
7.	/	/	/
8.	/	/	/
9.	/	/	/
10.	/	/	/
11.	/	/	/
12.	/	/	/
13.	/	/	/
14.	/	/	/
15.	/	/	/
16.	/	/	/
17.	/	/	/
18.	/	/	/
19.	/	/	/
20.	/	/	/
<i>(expand as necessary)</i>			