

# Organisation & Technology Questionnaire [6]

v1.1

This questionnaire is designed to gather information about your organisation.

It may be completed with or without assistance from Sheldon King Consulting – your choice!

If you have more information than requested then please enter it. Copies of invoices and phone/internet service bills are helpful too!

Organisation Name: \_\_\_\_\_

Completed By: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Date: \_\_\_\_\_

Return the completed version of this form to:  
sheldon@sheldonking.com

If you are unable to e mail a completed form, please  
call 0428 475949 for other options.

By returning this questionnaire you are agreeing for the contents to be held on file by Sheldon King Consulting. The contents are confidential to the consultant and client.

None if the information in this document is ever released to a third party unless it is either directed by the client or necessary to complete a task assigned by the client.

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**Your People**

This table helps everyone get an overview of how well your staff get to grips with your technology.

For It Skill Level, use this ranking system:

- 0 – Never Used a Computer
- 1 – Can turn on, open and close documents, print, turn off
- 2 – ... and can use MS Office, E mail and a bit of internet.
- 3 – ... and can change system settings and install new software.
- 4 – ... and can fix minor problems and undertake more advanced Office tasks.
- 5 – ... and can install operating systems and configure them.
- 6 – ... and have an IT qualification above Level III Diploma.

Name	Job Title & Function	Main IT Tools Used	IT Skill Level	I Wish I Was Able To ... With IT
<i>Jo Boss</i>	<i>Owner/Manager Oversees.</i>	<i>Dell Laptop, MS Office, Internet, Mobile Phone</i>	<i>2</i>	<i>Produce better spreadsheets and presentations for clients.</i>

**Your Technology enter the number you have of each**

- |  |   |
|--|---|
| <input type="checkbox"/> <b>Computers</b>            | <input type="checkbox"/> <b>Printers</b>        |
| <input type="checkbox"/> <b>Internet Connections</b> | <input type="checkbox"/> <b>Landline Phones</b> |
| <input type="checkbox"/> <b>Scanners</b>             | <input type="checkbox"/> <b>Mobile Phones</b>   |
| <input type="checkbox"/> <b>Digital Cameras</b>      | <input type="checkbox"/> <b>Fax Machines</b>    |

**We Have ...**

- |   |   |
|---|---|
| <input type="checkbox"/> <b>Server Room</b>       | <input type="checkbox"/> <b>Backup System (on and off site)</b> |
| <input type="checkbox"/> <b>Server Redundancy</b> | <input type="checkbox"/> <b>Central Systems Documentation</b>   |
| <input type="checkbox"/> <b>Asset Register</b>    | <input type="checkbox"/> <b>Lease or Hire Purchase Register</b> |

**Your Desktop Computers**

	<b>Make</b>	<b>Model</b>	<b>Processor/Speed</b>	<b>Memory</b>	<b>OS</b>	<b>Hard Disk</b>	<b>Extras/SN</b>
<i>eg:</i>	<i>HP</i>	<i>EVO D500</i>	<i>Pentium 2.4GHz</i>	<i>512MB</i>	<i>WinXP</i>	<i>100GB</i>	<i>DVD Burner</i>
D1	<hr/>						
D2	<hr/>						
D3	<hr/>						
D4	<hr/>						
D5	<hr/>						
D6	<hr/>						
D7	<hr/>						
D8	<hr/>						
D7	<hr/>						
D8	<hr/>						
D9	<hr/>						
D10	<hr/>						

*(continue on a separate sheet if necessary)*

**Your Server Computers**

	<b>Make</b>	<b>Model</b>	<b>Processor/Speed</b>	<b>Memory</b>	<b>OS</b>	<b>Hard Disk</b>	<b>Extras/SN</b>
<i>eg:</i>	<i>HP</i>	<i>EVO D500</i>	<i>Pentium 2.4GHz</i>	<i>512MB</i>	<i>W2003SBS</i>	<i>100GB</i>	<i>DVD Burner</i>
S1	<hr/>						
S2	<hr/>						
S3	<hr/>						
S4	<hr/>						

**Warranty Service Arrangements**

<b>Item Number</b> <i>from lists above</i>	<b>Warranty /New</b> <i>3 year</i>	<b>/Left</b> <i>1 year</i>	<b>Response</b> <i>4 hour</i>	<b>Type</b> <i>see below</i>	<b>Helpline #</b> <i>13 45 67</i>
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*(list only items that you know the warranty arrangements for )*

**Warranty Types:**

O/S = Onsite    Shop = Return to Shop (Standard)    Shop+ = Expedited Shop Service

**Desktop Computers and Servers are:**

Owned (assets)     Leased     Mixture of Both

**Leasing Details (complete: leasing company details, term of lease, type of lease ...)**

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**Your Printers, Faxes, Copiers**

<b>Make</b> <i>eg: HP</i>	<b>Model</b> <i>LaserJet4100</i>	<b>Laser/Inkjet</b> <i>Laser</i>	<b>Colours</b> <i>1 – Black</i>	<b>Extras/SN</b> <i>Envelope Feeder</i>
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**Your Internet Services (connection, e mail, website – list all if different)**

<b>Provider</b> <i>eg: Telstra</i>	<b>Plan</b> <i>MEGA500</i>	<b>Monthly \$</b> <i>29.95</i>	<b>Plan Expires</b> <i>(out of contract)</i>	<b>Extras</b> <i>Virus Scanning</i>
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**For Our E Mail We Have ....**

- Desktop E Mail (ie Outlook)
- Web Based E Mail (ie Hotmail)
- E Mail Management (ie AfterMail)
- Internal Server (ie Notes or Exchange)
- Electronic Backups of E Mail Messages
- Paper Copies of E Mail Messages
- We communicate with clients via e mail

**Your Networking Hardware**

(complete: wires, patch panels, wireless ...)

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**Your Network Security**

(complete: antivirus, anti-spam, anti-spyware, firewall, etc ...)

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**Software In Use**

(complete: any and all software in use ...)

Program	Vendor	Version	Platform	License #
	Microsoft	Office 2000 OEM	Win	3454-9587-11is-65ft-eo9s

**Your Phone System**

(complete: make and model of handsets, type of connection, service provider ...)

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**Your Mobile Phones**

<b>Make</b> <i>eg:Nokia</i>	<b>Model</b> <i>2200</i>	<b>Service Provider</b> <i>Optus</i>	<b>Plan</b> <i>Business Value 30</i>	<b>Expires</b> <i>Nov 04</i>	<b>Extras/SN</b> <i>Handsfree</i>

**Your Gadgets**

(complete: anything not listed above – scanners, cameras, pdas ...)

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**Your Vendors**

(complete: who you go to for computers, phones, software, printer ink ...)

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**Your Organisation in thirty words or less**

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**We Have ...**

- |   |  |
|---|--|
| <input type="checkbox"/> A Strategic Business Plan  | <input type="checkbox"/> A Risk Management Plan      |
| <input type="checkbox"/> A Business Continuity Plan | <input type="checkbox"/> A Staff Training Programme  |
| <input type="checkbox"/> An IT Systems Plan         | <input type="checkbox"/> A Floorplan of our space    |
| <input type="checkbox"/> Documented our Processes   | <input type="checkbox"/> An ISO or ASA Accreditation |

# Proficient™

## Information Technology Specialist Integration Checklist

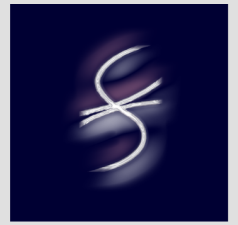
March 2013

For Proficient 7 and Later

### Summary

Your Proficient Project includes a software database component. Proficient requires FileMaker Server and FileMaker Pro clients. It can run under Windows or Mac OS X. This checklist is designed to help businesses looking to start a Proficient Project to ensure that their information technology meets the requirements to run Proficient. The specifications shown here are the *minimum* required to ensure satisfactory performance and security of Proficient.

Also included are recommendations for additional equipment or enhanced specifications that, if followed, will improve the performance and reliability of all business technology, and also enhance Proficient user experience.



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	Advice Required	OK
<p><b>Server</b> At least one computer in the business must be designated as a Server.</p> <p>The following server capabilities are required:</p> <ul style="list-style-type: none"> <li>- File Sharing</li> <li>- Remote access (for support)</li> <li>- Administrator access (for System setup)</li> <li>- Backup (for databases)</li> </ul> <p><b>Minimum</b> requirements for FileMaker Server installation for Proficient are:</p> <p>Processor: Dual Core CPU Memory: 8GB Disk Space: 80GB Free</p> <p>Operating System: Mac OS X Mountain Lion (10.8) Mac OS X Mountain Lion Server (10.8) Mac OS X Lion (10.7) Mac OS X Lion Server (10.7) Windows Server 2008 Standard R2 SP2 64bit Windows Server 2003 R2 SP2 (32bit)</p> <p>Preferred are either Mac OSX Mountain Lion 10.8 or Windows Server 2008 Standard R2 SP2 64bit, but all listed versions are supported.</p> <p>Server operating system must be fully updated with all vendor recommended updates and patches before Proficient server can be installed. Windows Small Business Server is not supported.</p> <p>FileMaker Server should not be installed on any server providing remote desktop, terminal services or Citrix access to multiple users.</p> <p>Disk indexing must be turned off. Antivirus software must except the entire FileMaker application directory and any database backup locations.</p> <p>The Admin Console also requires that users run Java 6 Update 29.</p> <p>TCP Ports 5003, 16000 and 160001 must be open for two-way traffic.</p> <p><b>Strongly recommended for Server Computers:</b></p> <ul style="list-style-type: none"> <li>- <b>Exceeding the Recommended System Specifications for FileMaker Server:</b> <a href="http://help.filemaker.com/app/answers/detail/a_id/10072/related/1">http://help.filemaker.com/app/answers/detail/a_id/10072/related/1</a></li> <li>- 2TB Hard Drive Capacity for file storage and management, but a minimum of free space equivalent to 1.5 times the total storage allocation of any data to be migrated to or stored on Proficient Software (may be external hard drive for temporary processing of files).</li> <li>- 4 or more core processor.</li> <li>- Separate server Grade SSD Array in RAID 1 for FileMaker Server and databases.</li> <li>- RAID 5+ HS, RAID 10 or RAID 1 + HS (Hot Spare) Hard Disk Redundancy for storage, multiple arrays if required. 10k RPM +.</li> <li>- Single partition on physical system volume to accommodate FileMaker Server's storage location which is on the C: drive.</li> <li>- Replication, Hard Drive or Flash RAM based backup strategy (tapes are not recommended), with verification.</li> <li>- Suitable backup strategy that may incorporate online, redundant, offline and offsite components.</li> <li>- Business-grade Antivirus software (Windows only).</li> <li>- Separate, 24-hour climate controlled location for Server and Network equipment.</li> </ul> <p><i>Sheldon King Consulting can assist in co-ordinating suppliers and contractors to bring your business up to these minimum requirements and recommendations.</i></p>	<input type="radio"/>	<input type="radio"/>



<p><i>Proficient is ideally suited to Virtual Server technology environments and those using Windows Terminal Services or Citrix. Some recommendations are included below, however this is not an exhaustive list. Please call to discuss specific requirements for these types of server.</i></p> <p><b>Strongly recommended for Virtual Environments:</b></p> <ul style="list-style-type: none"> <li>- <b>Virtual servers hosting FileMaker Server must meet or exceeding the Recommended System Specifications for FileMaker Server.</b></li> <li>- SSD Drives in RAID 1 are recommended for storing the operating system, applications and databases for FileMaker server. These should be configured as a discrete storage pool and only be available to the virtual server hosting FileMaker. Their capacity will depend on the choice of operating system, anticipated database size and backup strategies.</li> <li>- Where hardware will be hosting additional virtual server that is providing any type of remote access services on a regular basis, the virtual machine hosting FileMaker Server must be provisioned with a dedicated storage pool.</li> <li>- Replication-style backups are suggested. See Disaster Recovery documentation for appropriate method of restoring Proficient databases subsequent to a server failure.</li> </ul> <p><b>Client Desktops and Laptops</b></p> <p>Each user accessing Proficient will require access to a device capable of running FileMaker Pro.</p> <p>Minimum requirements for FileMaker Pro desktop installation for Proficient are:</p> <p>Processor: Dual Core CPU          Memory: 4GB          Disk Space: 15GB Free</p> <p>Operating System: Mac OS X Mountain Lion (10.8)          Mac OS X Lion (10.7)          Windows 8 Standard and Professional          Windows 7 Ultimate and Professional          Windows XP Pro SP3</p> <p>In addition, the following are required:</p> <ul style="list-style-type: none"> <li>- QuickTime 7.6 (Freely available)</li> <li>- Adobe Reader (Freely available) (Windows Only)</li> </ul> <p>Monitor resolution must be a minimum of 1280x1024. Regardless of size, display resolution must be set to native resolution (ie 1:1 pixels to display resolution), and Windows Standard theme is suggested for Windows installations for best use of available screen space.</p> <p>Proficient does <b>not</b> require Microsoft Office, but it may be used if available. Word processing, spreadsheet and other productivity tools should be selected to meet individual needs.</p> <p><b>Strongly recommended for Client Computers:</b></p> <ul style="list-style-type: none"> <li>- <b>Exceeding the Recommended System Specifications for FileMaker Pro</b>  <a href="http://help.filemaker.com/app/answers/detail/a_id/10012/related/1">http://help.filemaker.com/app/answers/detail/a_id/10012/related/1</a></li> <li>- Windows 7 for Windows installations (Windows XP and Windows Vista are not recommended.)</li> <li>- Centrally managed Business-grade Antivirus Software (Windows Only).</li> <li>- Group Policy preventing Application Removal (Windows Only).</li> </ul>	<p>○</p>	<p>○</p>

<ul style="list-style-type: none"> <li>- E Mail Access (for automated E Mail features).</li> <li>- Internet Access (for embedded online features).</li> </ul> <p><i>Sheldon King Consulting can assist in working with suppliers and contractors to bring your business up to these minimum requirements and recommendations.</i></p>		
<p><b>Networking</b></p> <p>Proficient is a networked database. Any computer accessing Proficient will do so via a Network.</p> <p>The minimum requirements for Networking are:</p> <ul style="list-style-type: none"> <li>- Professionally installed and tested Cat 5e or better cabling in good order.</li> <li>- A business-grade gigabit network switch.</li> <li>- A business-grade 802.11n wireless access point (where used).</li> <li>- Structured cabling.</li> <li>- Injection terminated Ethernet patch leads with integral flex-guards (no custom made leads).</li> </ul> <p><b>Strongly Recommended for Networking:</b></p> <ul style="list-style-type: none"> <li>- Network cable testing a minimum of once every 6 years (4 years in coastal locations).</li> </ul>	○	○
<p><b>Broadband Internet</b></p> <p>Internet access is required for support and many Proficient functions, including updates.</p> <p>Minimum broadband requirements are:</p> <ul style="list-style-type: none"> <li>- Reliable "High-speed" ADSL 2+ (24000/1024)</li> </ul> <p><b>Strongly recommended for Broadband:</b></p> <ul style="list-style-type: none"> <li>- Ultra High-Speed Broadband (NBN)</li> <li>- Business-grade DSL Router</li> <li>- Dedicated line for DSL (no other equipment on line)</li> </ul>	○	○
<p><b>Additional Requirements for Windows Server Environments</b></p> <ul style="list-style-type: none"> <li>- Volume for storage of pictures and documents must be NTFS formatted. ReFS is not supported.</li> <li>- Short file name generation must be disabled on document storage volume.</li> <li>- It must be possible to except FileMaker Server, FileMaker Pro and QuickTime from any threat management software (such as virus scanner, firewall).</li> </ul>	○	○
<p><b>Mobile (Draft Requirements Only)</b></p> <p>Proficient Mobile has the following requirements:</p> <ul style="list-style-type: none"> <li>- iPad with Retina Display (March 2012 models and later)</li> <li>- iOS6.1 or later</li> <li>- FileMaker Go 12 (Freely available from the App Store)</li> <li>- Active e mail setup</li> <li>- Wireless internet access (Wi-Fi for office sync, 3G or LTE for field sync)</li> </ul> <p><b>Strongly Recommended for Mobile:</b></p> <ul style="list-style-type: none"> <li>- Securing iOS device using via a mobile device management platform or a deployment profile</li> <li>- Remote wipe capability</li> </ul>	○	○

In consultation with our IT Services Provider, we have determined that our organisation has the appropriate IT infrastructure to support Proficient. I/we understand that any shortcoming or omission in IT setup could delay the implementation of our Proficient Project/impair system performance and may result in additional consulting or technical costs being incurred.

**Company Name** \_\_\_\_\_

**Signature of Owner(s)** \_\_\_\_\_

**Name of Owner(s):** \_\_\_\_\_

**Date** \_\_\_\_/\_\_\_\_/20\_\_