

Managed Services Questionnaire

This worksheet is designed to provide a clear understanding of your current environment. Ideally, this would significantly reduce the time required for an on-site visit and site survey. However, as with any type of questionnaire, this is a "living document". If there are areas that require clarification or additional detail, we've included areas for free-form response. We welcome your input and participation in better serving you and your business needs.



BAYTREE ASSOCIATES
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**Company
Name:**

Address:

City:

State:

Zip:

Contact:

Telephone:

Email:

Software Environment

Oracle RDBMS Instances

Version (e.g., 9.2.0.5)	Primary, Secondary or Supporting	Operating System	Plans to Upgrade ?

Third Party Software

Name (TOAD, PowerBuilder, etc.)	Use (e.g., Reports, Interface, Queries, etc.)	Operating System	Version

Hardware Environment

Database Servers

Operating System	Processors	RAM	Disk Space	Disk Configuration / RAID Level	Backup Medium

Web / Application Servers

Operating System	Processors	RAM	Disk Space	Disk Configuration / RAID Level	Backup Medium

ERP Environments

Vendor (Oracle, PeopleSoft, SAP, etc.)							
Version #							
Average Number of Users							
Modules Installed							

Patches Applied

Are patches Up to Date?	
If no, last patch applied?	

Customizations*

* Please note any customizations that have been made to the current ERP System. This includes "Chartfield" or "flexfield" modifications. If unknown, please note as "unknown". If none, Please note "vanilla" (for no customizations).

Network Environment and External Connectivity

Network Protocol	✓	Other Comments
Ethernet		
Other (Please specify)		
VPN Access (Please specify)		

Priorities & Focus Areas

On a Scale from **1 to 12 (1 being most important & 12 being least)**, please rank the most critical database environment issues you feel important to your company.

Service Priorities	Rank (1-12)	List any other priority areas that are not included in the matrix above that should be addressed.
Routine monitoring to ensure health of the system		
Staff mentoring		
Assistance with Development environment		
Performance review and tuning		
Disaster Recovery		
High Availability		
Apps Environment monitoring		
Maintain service levels		
Backup & Recovery planning, execution and monitoring		
Troubleshooting		
Upgrade planning and implementation		
Patch review and consultation		

Baytree Use Only:

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