



Technology Roadmap

56 The Esplanade, Suite 212
 Toronto, ON M5E 1A7
 T. 416.489.6312 F. 416-778-1714
 Toll-free: 877.287.7701
 www.TechnicalActionGroup.com

Client	[name]	Project Name	Technology Roadmap – [month, year]
Contact	[name]	Date	[current date]
Address	[address]	Submitted By	[name of TAG CIO]
City/Province	Toronto, ON	Status	For review
Postal Code	[PC]	Version	1.0

Project Objective/Overview:

The following has been assembled by the [name] team which outlines the very high level business objectives to be achieved over the next 2 to 5 years.

1. Growth:
 - a. Expand the number of users by 4 in the Toronto office and by 1 in the Burlington office over the next year to 1 ½ years.
 - b. Addition of another office in another city; this is entirely dependent on sales activities.
 - c. Toronto will be relocating to a new office
2. Accessibility:
 - a. A key objective is to empower all users so that they can be fully productive while working from within an office or remotely using the bring-your-own-device strategy.
 - b. Support for all operating systems and devices is critical for the core applications.
 - c. It's anticipated that the network will remain a predominately Microsoft shop with cross platform support.
3. Tools / Software Changes:
 - a. Migration to a newer version of SQL database platform with a newer technologies such as .Net. The FoxPro layer will be replaced. This solution will have to integrate with Salesforce.
 - b. Excel will remain the mainstay of modeling tools.
 - c. Scanning and document storage solution will be required to support direct scanning, OCR, automatic metadata tagging, search and retrieval, compliance and retention management
 - d. Better control over access to files and folders stored on the network.
 - e. Plan for the possible implantation of desktop video conferencing.

Technology Roadmap – Draft:

The following technology roadmap outlines what solutions are currently in place, hardware and software end of life guidelines along with the above objectives.

Function	Current Solution	1 to 6 months	7- 12 months	13-24 Months	25-36 months	37-48 Months	49-60 Months
Email & Calendaring							
Server Software	MS Exchange 2007		Migrate to MS Exchange 2015 on MS Office 365			Review / plan for refresh	
Platform	Windows 2008 SBS on ESXi		Not Applicable				
Server Location	On premise		Off premise				
Client Software:	MS Outlook 2010			Upgrade to MS Outlook 2016			
Client Software Installation location	Local workstation			Remote access server			
Line of Business – Custom Database (Client Portfolio Data)							
Server Software	MS SQL 2005			Refresh to MS SQL 2016			Review / Selection
Platform	Windows 2008 SBS on ESXi		Refresh hardware – server00a	Refresh to Windows 2012 R2 or above			
Server Location	On premise		On premise	On/off premise			
Client Software:	FoxPro Frontend MS Excel 2010			MS .Net client MS Excel 2016			
Client Software Installation location	Local workstation			Remote access server			
Line of Business – Custom Database (Client CRM Data)							
Server Software	MS SQL 2005			Migrate to Sales Force			Review / Selection
Platform	Windows 2008 SBS on ESXi						
Server Location	On premise			Off premise			
Client Software:	FoxPro Frontend MS Excel 2010			Web client			
Client Software Installation location	Local workstation			Remote access server			
Line of Business – Insurance Software							
Server Software	Not Applicable			Remote access server (Citrix / XenApp virtual application delivery)			Review / Selection
Platform	Not Applicable			Windows 2012 R2 or above			
Server Location	Not Applicable			On/off premise			
Client Software:	Canada Life, Desjardins Empire Life, Equitable Life Great West, London Life , etc			Canada Life, Desjardins Empire Life, Equitable Life Great West, London Life, etc			
Client Software Installation location	Local workstation			Remote access server			
Document Storage							
Server Software	Shared Drive			Shared Drive			Review / Selection
Platform	Windows 2008 on ESXi		Refresh hardware–server00a	Windows 2012 R2 or above			
Server Location	On premise		On premise	On/off premise			
Client Software:	MS Office 2010 Adobe Products			MS Office 2016 Adobe Products			
Client Software Installation location	Local workstation			Remote access server			
Client Document Filing (scanned images)							
Server Software	Shared Drive	Review / Selection		Shared Drive			Review / Selection
Platform	Windows 2008 on ESXi		Refresh hardware–server00a	Windows 2012 R2 or above on ESXi			
Server Location	On premise		On premise	On/off premise			
Client Software:	MS Office 2010 Adobe Products			MS Office 2016 Adobe Products			
Client Software Installation location	Local workstation			Remote access server			
Remote Access							
Server Software	Not Applicable			Remote access server (Citrix / XenApp virtual application delivery)			Review / Selection
Platform	ESXi hosting virtual machines for Remote Desktop or LogMeIn to internal workstations			Refresh hardware Windows 2012 R2 or above on ESXi			
Server Location	On premise		On premise	On/off premise			
Client Software:	Remote Desktop or LogMeIn			Citrix receiver software for Windows, MAC, iOS, Android			
Client Software Installation location	Local workstation			Remote access server			
Instant Communications (Instant Messaging)							
Server Software	Not Applicable						
Platform	Not Applicable						
Server Location	Not Applicable						
Client Software:	Not Applicable	Review / Selection					
Client Software Installation location	Not Applicable						
Accounting Package							
Server Software	MS SQL 2005						
Platform	Windows 2008 on ESXi						
Server Location	On premise						
Client Software:	Sage 300 ERP 2014						
Client Software Installation location	Local workstation						
Workstations							
Platform	Windows 7 – 32 bit	Review / Selection					
Client Software:	MS Office 2010 Suite UFV DB Adobe suite (selected) Insurance applications	Review / Selection					
Client Software Installation location	On premise						
Phone System							
Server Software	Avaya					Review / Selection	
Platform	Avaya and Windows 7 for Voicemail Server			Refresh hardware - PBX review - voicemail server only - erver00b			
Server Location	On premise			On premise			
Client Software:	Not Applicable						
Client Software Installation location	Not Applicable						

Last updated December 2015

Technology Roadmap – Draft Budget:

The following technology budgetary values have been assembled to support the above outlined strategy.

Function	1 to 6 months	7- 12 months	13-24 Months	25-36 months	37-48 Months	49-60 Months
Email & Calendaring		Onetime: \$2,000 to 3,000 Monthly: \$13/user				
Line of Business – Custom Database (Client Portfolio Data)		Server00A - Refresh – Budget - \$13,500 to 16,000 *****	Server Software - Refresh – Budget - \$10,500 to 12,000 *****			
Line of Business – Custom Database (Client CRM Data)		Onetime: H/W: \$10,000 to 14,000 S/W: \$1,500 Professional Services: \$2,000 to 2,500	Onetime: S/W: \$7,500 to \$8,500 Professional Services: \$3,000 to 3,500			
Line of Business – Insurance Software	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Document Storage		Included in above				
Client Document Filing (scanned images)	Solution not yet defined, Storage H/W: \$3,000 to 5,000 for storage or SAN for future \$15,000 to 25,000					
Remote Access			Server Refresh – Budget - \$32,000 to 41,500 ***** Onetime: H/W: \$10,000 to 14,000 S/W: \$19,000 to \$24,000 Professional Services: \$3,000 to 3,500 *storage solution included in previous phase			
Instant Communications (Instant Messaging)		Not defined				
Workstations		Workstation Refresh – Budget - \$900 to 1,200 /machine				
Phone System		Not defined				