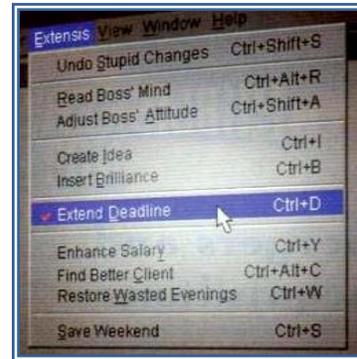


1.3 Content Summary Description

The **Guidelines** are divided into eleven (11) broad sections.

Together the sections provide a comprehensive menu for software acquisition:



READ AND USE THIS SECTION...	IF YOU NEED TO KNOW ABOUT ...
SECTION 1, THE INTRODUCTION	This section provides an overview of the software evaluation package/tool process, discusses the use of the Guidelines, and explains how to adapt them.
SECTIONS 2 THROUGH 6	<p>The next several sections are the key process and methodology of the Guidelines and describe the five phases of software evaluation.</p> <p>Each phase includes an introduction followed by detailed procedures for conducting the associated tasks and activities.</p> <p>The software package/tool evaluation phases follow.</p>
SECTION 2, STUDY INITIATION	<p>In the study initiation phase, the original request is reviewed, and an evaluation team is formed to conduct the study.</p> <p>The functional requirements are determined from information supplied by the user and documented in a functional requirements report.</p> <p>The project team is formed, and a project plan is prepared using the planning guidelines presented in Section 7.</p>
SECTION 3, PRELIMINARY EVALUATION	<p>In the preliminary evaluation phase, the actual software package/tool evaluation is initiated.</p> <p>The package/tools available internally as well as in the marketplace are identified and</p>

READ AND USE THIS SECTION...	IF YOU NEED TO KNOW ABOUT ...
	<p>reviewed to eliminate obvious poor choices.</p> <p>A vendor profile is compiled to measure the strengths and weaknesses of each organization marketing and supporting the products.</p> <p>Major contenders are then selected, and a make-versus-buy analysis is performed.</p>
SECTION 4, DETAILED FUNCTIONAL EVALUATION	<p>Once the commitment to purchase a software package/tool has been made, the detailed functional evaluation takes place.</p> <p>The capabilities, cost, design, support, and installation requirements of the package/tools that appear promising are carefully examined.</p>
SECTION 5, OPERATIONAL PERFORMANCE EVALUATION	<p>This next phase provides a basis for evaluating operational performance according to the type of product and options available from the vendor.</p> <p>This includes determining the type of assessment available from the vendor, building an appropriate plan, executing tests, and evaluating performance.</p>
SECTION 6, SELECTION AND INSTALLATION	<p>The fifth and last phase involves the final selection, acquisition, and implementation of the software package/tool, including negotiating the contract, preparing the installation plan, and performing a post installation review subsequent to package/tool implementation.</p>
SECTION 7, PLANNING GUIDELINES	<p>Section 7.0.0 contains a planning process that describes the use of the planning charts both as a reference checklist and as an integral component in the preparation of a project plan.</p> <p>Each of the seven columns (that are defined and explained) contains a series of comprehensive planning charts that include all the tasks and activities outlined in Sections 2.0.0 through 6.0.0.</p> <p>There are estimates provided for over 150</p>

READ AND USE THIS SECTION...	IF YOU NEED TO KNOW ABOUT ...
	<p>discrete activities that might be part of an evaluation.</p> <p>For each task and activity, an estimated minimum and maximum number of workdays is given. The estimates are presented in such a way that they can be modified or substituted for any specific evaluation effort. The user may also change the estimates to reflect actual experience derived from completed evaluations.</p>
<p>SECTION 8, APPENDIX A - FORM-COMPLETION PROCEDURES</p>	<p>Each of the forms is explained using playscript format to describe each activity performed and the person or function responsible.</p> <p>There are 3 key forms:</p> <ul style="list-style-type: none"> • <u>Software Evaluation User Request</u> – the basis for initiating the process • <u>Software Functional Requirements</u> – documents structured, quantified and weighted requirements for each candidate package in the areas of: <ul style="list-style-type: none"> ○ Application Suitability ○ Controls and Security ○ Operational Performance • <u>Software Scoresheet</u> – summarizes the weighted ratings for each candidate package in the areas of: <ul style="list-style-type: none"> ○ Functional Requirements ○ Design Concepts ○ Costs ○ Vendor ○ Support
<p>SECTION 9, APPENDIX B – REQUEST FOR INFORMATION</p>	<p>This appendix provides a procedure, Sample Form Letter/Inquiry as well as a questionnaire containing detailed technical factors and several application reference checklists as</p>

READ AND USE THIS SECTION...	IF YOU NEED TO KNOW ABOUT ...
	input to begin the information collection process.
SECTION 10, APPENDIX C – EVALUATION CHARACTERISTICS	This appendix expands and builds on the content of the Software Scoresheet to help and facilitate completion of each of the five sections with reference and support information.
SECTION 11, APPENDIX D - GLOSSARY	This appendix provides definitions and explanations for over 100 terms used in the software evaluation process