

## **TABLE OF CONTENTS**

1.0	INTRODUCTION .....	5
1.1	Why The Guidelines And Why Now?.....	5
1.2	The Benefits Are Extreme .....	6
1.3	Content Summary Description .....	7
1.4	The Guidelines are Scalable and Flexible .....	10
1.5	Getting Started.....	11
1.6	The Larger Context .....	12
2.0	STUDY INITIATION .....	15
2.1	Review the User Request.....	15
2.2	Organize the Evaluation Team .....	16
2.3	Determine/Evaluate the User's Functional Requirements .....	18
2.4	Document Functional Requirements .....	22
2.5	Quality Review.....	24
2.6	Checkpoint Review .....	24
3.0	PRELIMINARY EVALUATION .....	26
3.1	Identify Available Software .....	26
3.2	Compile General Software Package/tool Profiles .....	31
3.3	Establish Vendor Profiles .....	34
3.4	Determine Major Contenders .....	36
3.5	Perform the Make-Versus-Buy Analysis.....	37
4.0	DETAILED FUNCTIONAL EVALUATION .....	40
4.1	Establish the Cost Profile .....	40
4.2	Study the Design Features .....	43
4.3	Determine Installation Requirements .....	48
4.4	Evaluate the Support Provided .....	49
5.0	OPERATIONAL PERFORMANCE EVALUATION .....	55
5.1	Determine the Method of Operational Performance Evaluation .....	55
5.2	Develop the Benchmark/Free-Trial Plan .....	57
5.3	Conduct the Benchmark/Free Trial .....	60
5.4	Attend Demonstrations.....	63
6.0	SELECTION AND INSTALLATION .....	65
6.1	Select the Package/tool and Prepare the Evaluation Report .....	65
6.2	Quality Review .....	67
6.3	Acceptance Review .....	68
6.4	Finalize Contract Negotiations .....	68
6.5	Acquire the Package/tool.....	70
7.0	PLANNING GUIDELINES .....	76
7.1	The Planning Process .....	76
7.2	Planning Components and Estimating Guidelines.....	78
8.0	APPENDIX A - FORMS COMPLETION PROCEDURES.....	98
8.1	Introduction .....	98
8.2	Software Evaluation User Request .....	99
8.3	Software Functional Requirements .....	103
8.4	Software Scoresheet .....	108
9.0	APPENDIX B - REQUEST FOR INFORMATION .....	113
9.1	Procedure.....	113
9.2	Sample Form Letter - Request For Information .....	114
9.3	Software Tool Questionnaire.....	115
10.0	APPENDIX C - EVALUATION CHARACTERISTICS CHECKLIST .....	120
10.1	Introduction .....	120
10.2	Functional Requirements.....	120

10.3	Design Concepts.....	122
10.4	Costs.....	123
10.5	Vendor.....	123
10.6	Support.....	124
11.0	APPENDIX D - GLOSSARY .....	126
11.1	Terms & Definitions.....	126