

**Sample
Computer System/Vendor Screening Elements**

Summary for: _____

By: _____

Summarize results from vendor interview and reference calls:

I. SYSTEM ISSUES:

1. Multi-User Capability:
2. Technical Capacity/Support:
 - a. Underlying Software:
 - b. Knowledgeable and available staff:
3. Ease and Speed of Use (e.g., screen changes, jumping around):
4. Stand-Alone/Batch Processing Capacity:
5. Database Integrity Protections (tiered password protections; back-up processes)
6. Ease of Modification of Fields (contents of selection categories); Reports (data included):
7. Cost:
8. Timing:
9. Willingness to Grant Ownership:
10. General Compatibility:

II. PROGRAM DESIGN ISSUES:

1. Ability to Recall Clients (non-duplication):
2. Letter Generation:
3. Generally User Friendly (prompts, pull-downs):
4. Reporting Capacity -- Flexible, Friendly and Powerful:
5. Good documentation (printed manuals and internal to system):
6. Time tracking (phone and non-phone time)
7. Tickler system

VENDOR SELECTION QUESTIONS

VENDOR: _____

BY: _____

I. SYSTEM ISSUES

1. Multi-User Capability:

- a. How many concurrent users does any running version of your system currently support?
- b. Are there limits to the number of concurrent users?
- c. Does the system slow down with more users?; What performance differences can one expect having 7 versus 15 concurrent users?
- d. Can we have contacts for three references currently running at least 5 users?

2. Technical Capacity/Support:

a. Underlying Software:

- i. Can we use the underlying software to modify the system (e.g., if in Access, do our own system fixes)?

b. Knowledgeable and available staff:

- i. Who are the individuals responsible for the design of the system? Please send resumes?
- ii. Who are the individuals who will be responsible for modifying and revising the system over time? If different from c. please send resumes?
- iii. For both types (designer and/or modifier-ongoing resource):
 - a. Is he/she/they working on this software their full-time job? If not, what else to they do?
 - b. When would he/she/they be available for design work (starting when, what major time constraints)?
 - c. For modifications and ongoing support, what would be the basis of their availability? Are there particular times of day; days of the week; number of hours; ways to access (e.g., on-line only) that limit access?

3. Ease and Speed of Use (e.g., screen changes, jumping around):

Assuming 10 concurrent users, network with smart stations:

- a. Describe how long it takes to switch screens?
- b. What can make the system perform fastest?
- c. What can degrade performance?
- d. Can user jump over screens?

4. Stand-Alone/Batch Processing Capacity:

- a. Describe capacity of system to add batches of data from separate satellite branch?
- b. Any problems?

5. Database Integrity Protections (tiered password protections; back-up processes)

- a. Are there levels of password protection? If yes, describe:
- b. What is built into the system to protect from losses of data?

6. Ease of Modification of Fields (contents of selection categories); Reports (data included):

- a. Can the user add “categories” and “types” within structured fields (e.g., new categories For pull-downs)? Describe:
- b. Can the user add fields?
- c. Can the user modify the reports; to what extent?

7. Cost:

- a. Do you have any better sense than _____ (from their prior statement/bid) of what the software design alone would cost? How calculated and any how build-in ceiling?

8. Timing:

- a. We hope to have a version at least in testing by April 1, 1997: could you meet that timing?

- b. What other major projects are you working on that could affect the completion by that time?
- c. What other issues might impact the timing?

9. Willingness to Grant Ownership:

- a. Do you have any issues with the program having license/ability to sell the final product?
- b. If you want to market, how can the program participate in benefits of marketing?

10. General Compatibility:

(No question -- general observation.)

II. PROGRAM DESIGN ISSUES:

Please describe how your current (or prospective) program will handle each of the following --

1. Ability to Recall Clients (non-duplication):
2. Letter Generation:
3. Generally User Friendly (prompts, pull-downs):
4. Reporting Capacity -- Flexible, Friendly and Powerful:
5. Good documentation (printed manuals and internal to system):
6. Time tracking (phone and non-phone time)
7. Tickler system

REFERENCE CHECK QUESTIONS

VENDOR: _____

BY: _____

REFERENCE: _____

DATE: _____

My guess is this will take 20-30 minutes; may need to schedule. Start with description of program and you can offer put on mailing list for program updates as a token of appreciation for their time (if you do, make sure to get their appropriate contact information).

BACKGROUND QUESTIONS:

1. What is your personal role/history with the MIS (involved in selection, installation, current oversight, etc).
2. How long have you had the system?
3. What did you have before? Did you look at IRIS, KEMPs?
4. Who uses the system (paralegals, attorneys)?
5. How many users at one time?
6. What is the hardware/software configuration?
 - a. Stations: number; smart/dumb; cost:
 - b. Size/cost server:
 - c. What network/cost/happy with:
 - d. Number types of printers/happy with:
7. Describe your general/overall level of satisfaction with the program/vendors services:
__ Very satisfied __ Somewhat satisfied __ Somewhat dissatisfied __ Very dissatisfied

I. SYSTEM ISSUES

1. Multi-User Capability:

- a. Are there limits to the number of concurrent users?

b. Does the system slow down or crash with more users? Describe:

2. Technical Capacity/Support:

a. Underlying Software:

- i. Does the underlying software support the program?
- ii. Have you used other programmers (who know underlying program) to debug or do modifications?

b. Knowledgeable and available staff:

- i. Who are the individuals you work with when you need help?
- ii. Are they knowledgeable?
- iii. Are they accessible?
- iv. Particular strengths:
- v. Particular weaknesses:

3. Ease and Speed of Use (e.g., screen changes, jumping around):

- a. Describe how long it takes to switch screens?
- b. What can make the system perform fastest?
- c. What can degrade performance?
- d. Can user jump over screens?

4. Stand-Alone/Batch Processing Capacity:

- a. Do you use the system to add batches of data from separate satellite branch?
- b. If yes, any problems?

5. Database Integrity Protections (tiered password protections; back-up processes)

- a. Do you use levels of password protection? If yes, describe:
- b. Have you experienced any losses of big chunks of data? What happened?

6. Ease of Modification of Fields (contents of selection categories); Reports (data included):

- a. Have you added “categories” and “types” within structured fields (e.g., new categories

For pull-downs)?

- b. Have you added fields?
- c. Have you modified the reports; to what extent? Strengths/weaknesses?

7. Cost:

- a. Did the vendor come in at the original projected budget? If no, why not?
- b. What is the rate for ongoing support?

8. Timing:

- a. Did the vendor meet timelines set forth. If no, why not?

9. Willingness to Grant Ownership:

10. General Compatibility:

- a. Do you enjoy working with the vendor?

II. PROGRAM DESIGN ISSUES:

Please describe how well your current program handles each of the following --

- 1. Ability to Recall Clients (non-duplication):
- 2. Letter Generation:
- 3. Generally User Friendly (prompts, pull-downs):
- 4. Reporting Capacity -- Flexible, Friendly and Powerful:
- 5. Good documentation (printed manuals and internal to system):
- 6. Time tracking (phone and non-phone time)
- 7. Tickler system

Anything else you'd like to add?