

Software Evaluation Spreadsheet Instructions

This document provides detailed instructions for using the Software Vendor Evaluation Spreadsheet. You can print this out to be used as a reference when you are inputting the data to the spreadsheet. Tips for each of the evaluation items are on page two. Note that the spreadsheet is embedded in a webpage and that this means that the "UPDATE" button must be clicked to force a recalculation.

Instructions

The process is quite simple. Within its first seven worksheets the spreadsheet details many of the factors that you have to consider in specifying your application software. When you have selected your vendors for evaluation you enter their details on the spreadsheet and add their score against each item on the list. If the listed item does not apply to you, simply leave it blank. The work sheets are as follows:

1. Overall Requirements
2. Admin and Security
3. Reports (Statistics)
4. Web Based Software (ASP Solutions)
5. Vendor and Vendor Support
6. User Defined Data (You can put your own data in here)
7. Cost (of the software and associated support and services)
8. Final Score (Automatically calculated)

Note: Worksheet six has been included for you to define your own features. For example, if you are evaluating ERP software you can add your own ten features that are specific to ERP software.

You also apply your own weighting factor to each individual item within the worksheets so that the final result is scored according to your specific requirements. Four vendors can be entered on each sheet. If you want to evaluate more than four vendors you can do it twice.

Vendors' Names

The first thing that you must do is to enter the relevant vendors' names in the boxes provided at the top of Worksheet 1, Overall Requirements, (Name Vendor 1, Name Vendor 2, etc.) This action will automatically populate the corresponding fields in the other sections.

Weighting Factor

Features that you may require in your software are listed in the description column on the left side of the sheet. The next column is titled "**Your W/F**". This is where you enter your weighting factor of 0 to 4 for each feature. This should reflect the importance of the feature to you. Typical weighting factor definitions are:

0 Not Important (Select 0 or ignore if the feature is not a requirement)

1 Has some Significance (Select 1 if the feature is not important but may have some use)

2 Significant (Select 2 if the feature is one that you want but upon which you could possibly compromise)

3 Highly Significant (Select 3 if the feature is one that you would not like to be without)

4 Absolute or mandatory requirement (Select 4 if the feature is an absolute necessity for which there is no compromise)

Vendors Score

When you have selected the weighting factor for the feature you should then move along the columns adding your score of 0 to 4 for this feature against each application that you are evaluating. The score should reflect how well the application handles each feature. Use the following tips as a scoring guide:

4. Fully meets requirement
3. Partially meets requirement
2. Can be modified or developed or will accommodate a "work around."
1. Available in next revision
0. Does not meet requirement

Progressively work through each worksheet in the spreadsheet entering your weighting and scores for each feature until you reach the end. At this point, if you click an "Update" button, the vendor scores will be recalculated and displayed for each vendor in the **Final Score** table at the bottom. Note: You need not enter data in sections that do not apply, e.g. if you are not considering web based software ignore this section. Note also that you **must** click one of the update buttons to force a recalculation.

Note: The more features you require the more expensive your software is likely to be. Do not specify items because they seem like a good idea. Select only those that know you will require now or in future.

Worksheet 1. Overall Requirements

1.1	Operating System (Windows NT, XP, etc.)	You may have a requirement for a particular operating system. If you are unsure of this you should speak to your IT people.
1.2	Database format (SQL, Oracle, etc.)	You may have a requirement for a particular database system. If you are unsure of this you should speak to your IT people.
1.3	Data import or export requirements	You should consider how important it is for you export or import data in the application. For example, you may want to export data to Microsoft Office applications for statistical purposes if the application is weak on reports. You may also require to interface some of the outputs with other software packages. Also, during implementation you may find that some applications are capable of importing data from other sources. This is more important during an upgrade to a new system than in a first time implementation.
1.4	The look and feel of the application.	Do you have strict requirements for the system to follow standard windows processes and procedures? Is it important to you that it does?
1.5	Filtering and searching friendliness.	This applies to database software. When searching for data on the system you should ensure that it meets your requirements for ease of use. There should be several optional ways of finding data that the users will need. How easy is it to find specific data such as a particular record? Also, how easy is it gain access to the documents and reference information that may be stored in the system?
1.6	Look ups	Look ups are tables or drop down lists that offer you a selection of data to choose from when using the system. It should maximise the use of these so that free text entry is limited. All data inputs should offer users a list where possible.
1.7	User configurability of look ups and lists	Most people prefer that the lists and drop downs mentioned above are user configurable. Users should be able to insert their own data to these meaning that their lists and drop downs can be populated with relevant and familiar data where applicable.
1.8	User configurability of tags and labels	Tags and labels are the identifiers that are displayed against each field on your software. For example Customer Relationship Software may refer to "Customers" where you would prefer this to be "Clients". Some systems allow this to be changed to the user's definitions.
1.9	Handling of links to ancillary information	Your system should meet your requirements with respect to its handling of links and hyperlinks to external records and information. For example, do you need it to be able to link to documents or data within other external systems?
1.10	Required number of concurrent users.	Does the application support the required number of users? Concurrent users are users that are logged on to the system at the same time. You may also want to ensure that your licence agreement allows you to install the software on any number of PCs. Multi-user licences often allow this.
1.11	Archiving requirements.	You may have a requirement to archive your data for a number of years. You should ensure that the system is capable of this.

1.12	Barcoding, PDAs and remote devices	The use of devices that support remote is much more common as this technology is improved. Consider whether you will be using PDAs (personal digital assistants), laptops or remote devices and ensure that the system is capable of supporting your needs.
1.13	Single or multi-site functionality	Must the application support multi-site operation or are you on a single site?
1.14	Graphical, hierarchical data structure	Database systems which display a graphical representation of a hierarchical structure (parent/child relationships) are generally preferred. These make searching easier and also help data configuration and implementation. For example in a company asset register the assets may be identified in a tree structure like Region > Site > Department > Location > Sub-location, etc.
1.15	Regulatory compliance support	In your industry are there any statutory standards to which the software must comply? For example if you are an ISO9000 organisation does the software comply with this?
1.16	Ease of implementation	You should consider the work required to implement the software. Is it simply a case of installing it on a server on your network and mapping drives to it? Or, does it require lots of expensive, on site consultancy?
1.17	Additional database software required	Some applications require that licences are purchased for additional database software such as SQL server. You should ensure that you clarify any requirement for this.
1.18	System maintenance	You should consider how much maintenance is required by the system. For example, are manual database backup and archiving processes required?
1.19	Paperless systems	You should consider your requirements with respect to paperless systems. Most applications generate paper reports or other hard copy. If you don't want these you should ensure that the system will function otherwise.
1.20	Access to data from various areas	System users may require to log on and input or check data from any work station that has the application installed. Is this important?
1.21	Equipment history	Display of equipment maintenance history over time should be easily achieved. This should take no more than two or three mouse clicks. Display of history is an important capability of your software as it can greatly help your maintenance people in both fault finding and equipment improvement. Some systems offer this as a report but it is better if it can be quickly displayed on screen.
1.22	Simple login process	This is a small but important point. Login should be achieved quickly and effortlessly.
1.23	Speed	The software should conform to your requirements with regard to speed of access and response time. It should also comply with your volume transaction handling requirements.
1.24	Customisable screens	You may want to consider customisable screens that allow the administrator to hide specific fields from defined users. This is not a security function. It is used to simplify the screens for certain users, hiding those fields that they do not use.
1.25	Resourcing	All software applications require resources to keep them running and administer them. Assess yours for this.
1.26	Alternative Languages	Score the package for its support of alternative languages if this is a requirement.
1.27	Overall ease of use	Taking all things into consideration you should score each package for its ease of use. Remember that you are assessing it not only for how easy you find it to use but also for the intended user group. Is the program suitable for the level of proficiency of your intended users?
1.28	Your Data	
1.29	Your Data	
1.30	Your Data	

Worksheet 2 - Administration and Security

2.1	Ease of use	Administration of the security features of some software systems can be very complex. You should ensure that your application has a useable administration module and that you have the IT structure to support this.
2.2	Tabular selection	Many security modules offer a table of functions for which permissions can be granted to each user or group. This is normally done by checking or ticking the relevant permissions boxes for each user or group. Score the application's usability here.
2.3	Password	Users should be allocated passwords. This need not necessarily be done on an individual basis. For example it may be enough for all people doing the same job and in the same section to have the same password.
2.4	Individuals and group settings	You should be able to set up individual users ID's as well as user groups. This allows users who require the same access level to be placed in the same group.
2.5	Audit trail	You may require an admin audit trail that would provide traceability to individuals for all changes to the administration and security module.
2.6	Customisation	Application customisation should be easy for the administrator. For example configuration of screens and user configurable data should be intuitive and not requiring a high level of IT knowledge.
2.7	Your Data	
2.8	Your Data	
2.9	Your Data	
2.10	Your Data	

Worksheet 3 - Reports (Statistical Output)

3.1	Ease of access to reports	Reports must be easily accessed and found on the system. There should be little delay in processing them. For reports that fall within a date range you may want to look for applications that offer a selectable calendar rather than requiring the user to type in actual dates.
3.2	Data export capability	Many systems provide a data export facility. For example they may allow you to export data to MS Excel. Some people prefer this as it provides them with additional flexibility when they can further process the data in Excel.
3.3	Customisable reports	Customisable reports allow the user to modify existing reports and save them as additional reports. This is much easier than creating reports from scratch.
3.4	Format of reports (graphical/text)	What functionality does the application have with respect to its handling of report output? Does it allow data to be displayed graphically?
3.5	Your Data	
3.6	Your Data	
3.7	Your Data	
3.8	Your Data	

Worksheet 4 - Web Based or ASP Software

4.1	Purchase or rent	Who owns the software? This is an important factor as some web based systems can be purchased and installed on your own Intranet. Others are rented and installed on the vendor's servers.
4.2	Data ownership	Is there any ambiguity with respect to the ownership of the data?
4.3	Functionality	Due to limitations in the programming of web browser based systems some of these packages have limited functionality.

4.4	Response Speed	Is the response time of the software satisfactory?
4.5	Company stability	If you are trusting your data to your software vendor's servers you must ensure that there is a mechanism in place to recover this data if the vendors shuts shop.
4.6	Cost analysis	If you are renting web based software you will have to carefully assess the cost against that of buying a web based package for installation on your Intranet.
4.7	Internet access	Do all the PC's that you intend to use a web based system already have Internet access. If not what will this cost?
4.8	Customisation	Web based software must often be used without customisation. If this is the case, will the application meet your requirements as it stands?
4.9	Spare	
4.10	Spare	

Worksheet 5 - Vendor Assessment and Vendor Support

5.1	Stability	Each vendor's stability must be assessed. How long have they been in business? How long have they been selling this type of software? When was this application first developed? How many local and international clients do they have for the application?
5.2	Professionalism	Assess each vendor for the professionalism displayed in dealing with your inquiry and in demonstrating their products.
5.3	Service level agreement	Assess each vendor for the level of future service and support that they offer. Do they provide telephone support at the times you require it? Do they provide online help? What does it cost for the level of service that you require?
5.4	Provision of customisation	If you require the application to be customised you should assess each vendor for the service they offer in this and costs involved. You may also require that the software is user customisable.
5.5	Upgrade path	If the application is an entry level system that you may upgrade in future assess the vendor for the upgrade path offered and cost of these upgrades.
5.6	Customer base	How many packages has the vendor sold and who buys them?
5.7	Support for add-ons	Some software packages use add ons to make them more comprehensive. If the use of add-ons or third party modules is important evaluate the software for this.
5.8	Your Data	
5.9	Your Data	
5.10	Your Data	

Worksheet 6 - User Defined Data

6.1	Your Data	Use this section to score additional features of your own choosing
6.2	Your Data	"
6.3	Your Data	"
6.4	Your Data	"
6.5	Your Data	"
6.6	Your Data	"
6.7	Your Data	"
6.8	Your Data	"
6.9	Your Data	"
6.10	Your Data	"

Worksheet 7 - Software and Associated Costs

7.1	Cost of software	Assess the application for bottom line cost for the configuration and number of users that you require?
7.2	Cost of hardware	What is the bottom line cost of any additional hardware required to make the implementation work with this application?
7.3	Potential future cost	Assess for potential for significant future costs.
7.4	Implementation cost	Implementation costs may include items such as installation of the software and consultancy. You should consider this for each application. (Training is in the next column.)
7.5	Training cost	Assess for training costs involved in implementing this application?
7.6	Cost of customisation	Assess the application for any costs involved in customising it for your requirements.
7.7	Spare	
7.8	Spare	
7.9	Spare	
7.10	Spare	

Worksheet 8 - Final Score

Worksheet 8 is not editable. This is where the final scores are calculated and displayed. Note that the "Update" button must be clicked to update the spreadsheet each time you update the data. This may take a few seconds. There is an Update button at the top and the bottom of each worksheet. Clicking the button within any worksheet will update the final score. In other words the whole spreadsheet is updated from any of the Worksheets.