PROJECT PERFECT
Pty Ltd

Business Evaluation User Guide

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Document Origin

No.	Author	Department
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Change History

Version	Date	Changes
1.0	1 Feb 09	Initial Version

Overview

Purpose	The purpose of this document is to provide guidance as to how to set up a review of the software from a business perspective. The business testing is to ensure the software will meet the requirements previously identified.
What to test	There are three areas to test: • Functional Evaluation • Data Evaluation • Report Evaluation
Functional Testing	The functional testing is based around the business processes and functional decomposition. Are the functions you require within the software?
Data Evaluation	The data evaluation is based on the data modelling exercise. Is the data you want to store and manage available within the software?
Report Evaluation	Are the reports you require able to be generated from the system? Do we need to build new reports or modify existing reports?

Functional Evaluation

Who

The functional evaluation is normally undertaken by the business area in conjunction with the vendor's technical staff.

Basis for the testing

The basis for the testing are the functional decomposition and data modelling from the Final Requirements. A good logical approach is the following.

Step	Action
1.	Take each business process and translate that into a series of steps
2.	Look for variations in the process.
3.	Add to the list for testing

Recording results

You can record the outcome as one of four situations. The answer to the question 'Meets Requirements" is:

Result	Description
Yes	The result meets the requirements
No	The result does not meet requirements
Partially	The result partially meets requirements although some component of our needs is not met
Alternative	An alternative approach is available which is not how we required it to be done but it will still work for us.

Comments

Add a brief comment regarding the answer if appropriate. If the comment is going to be extensive (e.g. a page or more) then refer to the document rather than try and record in a single cell.

Example Functional Evaluation

Overview

The following is an example of how a functional evaluation might look.

Process Name: Register new client

Steps	Variations	Meets Reqts	Comments
Enter client	Standard Process	Y	
	Client belongs to existing company	P	Difficult to link to existing company
	Client already registered	Y	Warns of duplicate record
Enter address	Standard Process	Y	
	No postcode	Y	Forces entry
	No state	N	Cannot validate against list of states

Meets Requirements

Legend:
Y=Yes, N=No, P=Partially, A=Alternative approach available

Data Evaluation

Overview

The system is not going to produce results if the appropriate data is not stored. You need to discuss information stored with the vendor's technical staff. The intention is not to do an analysis of the database design. The intention is to ask questions such as "If we want a report of left handed clients, can the system tell us?" In other words, does the system allow you to store whether the client is left handed, right handed or ambidextrous.

Recording

Take the data modelling worksheet and add two additional columns:

- Available
- Issues

You can now work your way through the data and confirm it is available.
In the template we have used colours to indicate a problem area (red for problem, green for no problem)
An example is on the next page.

Example Data Evaluation

Example Data Evaluation The following example is the data model sheet with additional columns.

Data Evaluation Worksheet

Name	Attribute	PK/FK	Ref. Table	Note	Example		Available	Issues
Client	Client No	PK	No	Only credit customers, not cash sales	10001, 10002, 10003		All fields available	
	Surname				Smith			
	First Name				John			
	Credit Rating	FK		FK to Credit Rating Entity	15 day, 30 day, 45 day			
Products	Product No	PK	No	Both our own products and ones we sell as distributor	123456			
	Distributor's Product No			The number we use to purchase from the manufacturer	J97, 4444444, PHR0964329		No number available	There are some custom fields we can use. This may need to be configured

Report Evaluation

Overview	Every organisation has a collection of reports that are important, and unfortunately a collection of reports that probably never get used. Implementation of a new system is an opportunity to get rid of the latter. You might also find that the reporting in a new solution is more flexible and configurable than the fixed reports issued from the old system. Instead of a report showing sales in each branch, you may be able to select options in the reporting to show one branch for any period, by any number of different criteria.
Internal Report review	Gather together all your existing reports (or at least a few sample pages of each) and decide if you want to continue receiving those reports. Also see if there are additional reports you would like to see in the new system. Add them to a list.
Report Evaluation	Work through each report with the vendor's technical staff and determine if the report exists or a report that presents the same information exists. If not, decide if it can be built, or if it is no longer available.

Example Report Evaluation

Overview

Use a reference to the existing reports. If necessary create a numbering system to identify reports. Sometimes reports end up with the same name and are hard to identify without a number. Branch sales report may actually be two reports. One by product and one by customer.

Report	Avail	Comments
Total Sales	Y	
Customer Sales by Category	N	Need to build this report
Customer Sales by Product	M	Add subtotal for each product group

Meets Requirements

Legend:
Y=Yes, N=No, M= Yes but Modifications Required, A=Alternative report available