



PROJECT **PERFECT**
Pty Ltd

Technical Evaluation User Guide

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Document Origin

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Change History

Version	Date	Changes
1.0	1 Feb 09	Initial Version

Overview

Goals The technical evaluation is designed to understand if the solution will deliver a technically stable and manageable platform for the organisation. It is also to understand the likely effort required to implement the package.

What it is not The technical evaluation is not about finding out if the solution will fulfil all the functions that the business desire. That will be addressed in the functional evaluation. The only area of overlap is where the solution may be able to perform the function, but the way in which it does it will cause problems for the system infrastructure or data. For example, remote printing that will not work over the corporate WAN without substantial bandwidth increases.

Key Areas to Review

Key Areas

The following are the key areas to examine. For each selection there may be other areas that are relevant to that solution.

Area	Description
Installation	How the software installs on the company system
Data Conversion	How data is converted and what data issues may arise? This includes corrupt data, new data and data to be reformatted. Also availability of data cleanup or modification tools.
Client installation	Issues around the installation and running of software on client machines. Remote management
Database	The interface to a database
Interfaces	Interfaces to other software
Backup and Recovery	Any problems around backup and recovery of a system
Environments	What environments will be required (e.g. testing, production, development)
Performance	System response times and load balancing
Security	Suitability of the security model. Anti virus if applicable
Space considerations	What equipment will be required and where will it be located
Support	Reviewing documentation provided and support facilities including help screens
Customisation	What can be customised and how difficult is it to do?
Skills	What skills do we need to operate and customise the solution? What training will be required?
Upgrade path	How often do upgrades occur and what effort is required to upgrade?
Implementation Tools	Are any tools provided to assist in implementation? For example test management tools or requirement management tools
Implementation Support	What level of support is provided for installation and setup?
Compatibility	Ability of the system to use current infrastructure such as printers, routers, modems etc.

Approach

Overview The best approach is to develop a list of things to be checked under each section. Work with the vendor technical specialist to go through each transaction and explore the way in which it is undertaken, and any unusual things that may arise.

Example If reviewing a backup and restore, you might have the following checklist:

- Run full system backup
- Run partial system backup
- Run incremental backup
- Run backup while system in use checking records being modified
- Run full system restore
- Run incremental restore
- Review automation of backup
- Review error checking in backup
- Etc.

Workshop An initial list can be created by the project manager in conjunction with technical specialists but the best way to ensure all areas are covered is to run a workshop with technical people, plus a few business people to review and add to the list. Often this brings out things to test that are not initially considered.

Reporting

Overview Use the following reporting structure

Backup & Restore The backup and restore function was tested and the following were the findings.

Tested	Result	Implications
Full System Backup	No issues. Took 30 minutes	Nil
Partial System Backup	Difficult to set up due to cumbersome file selection process	Will take a few days for our DBA to set this up during installation. Needs to be built into implementation plan
Incremental Backup	Works fine but file ID is complex	Review current file library system and adjust to suit.
Etc.		

Data The following findings were made regarding data.

Issue Name	Description	Action Required
Blank Addresses	Our addresses have a large number of blanks	Need to complete all addresses prior to conversion. A manual cleanup required.
Speed of upload	We uploaded 1,000 clients into the database as a test and it took 1 hour. We have 100k clients	Need to find out why upload is slow and make sure we can convert data in a shorter time.
Etc.		

Vendor Response

Overview It is reasonable to allow the vendor to comment on the observations from the technical assessment. After you have prepared the document, discuss with the vendor and get their input.

Benefit The vendor will know the solution far more comprehensively than the company will. The vendor may be able to suggest another course that will be more beneficial to the implementation or ongoing use of the software. Another benefit is that as we draw towards a decision, and negotiation of details, the vendor may use perceived limitations in the software to enhance their offer.
An example may be where a particular security feature is not available. The vendor may offer to build that feature at no cost in order to close the sale.
