

Vendor Selection Scorecard					
		<i>Vendor #1</i>	<i>Vendor #2</i>	<i>Vendor #3</i>	<i>Vendor #4</i>
Criteria (Rate 1-5, 5=Excellent)					
Technical					
1	Operating System (Windows NT, XP, etc.)				
2	Database format (SQL, Oracle, etc.)				
3	Supports concurrent users				
4	Data import or export requirements				
5	Required number of concurrent users				
6	Archiving requirements.				
7	Barcoding, PDAs and remote devices				
8	Single or multi-site functionality				
9	Graphical, hierarchical data structure				
10	Ease of implementation				
11	Additional database software required				
12	System maintenance				
13	Access to data from various areas				
14	Supports distributed file stores				
15	Support multiple datasets				
16	Simple login process				
17	Security controls				
18	Speed				
19	Customizable screens				
20	Overall ease of use				
21	Ease of access to reports				
22	Customizable reports				
23	Format of reports (graphical/text)				
24	How are updates delivered				

25	How often are updates released				
26	How are bugs addressed				
27	How are fixes delivered				
28	System scalable				
29	How much IT training is involved (hours, days)				
30	Cost				
31	•Potential future cost				
32	•Implementation cost				
33	•IT Training cost				
34	•Cost of customization				
35	•Cost of software				
36	•Cost of hardware				
	Software Features & Functions				
37	Indexing and retrieval				
38	What kind of file types				
39	Wildcard searching				
40	Document Content searching				
41	The ability to search and retrieve based on an index field				
42	The ability to do Boolean searches (A and B, A, or B, A less than xxx, more than xxx, etc.)				
43	The ability to do full text search of OCR'd documents				
44	The ability to display search words highlighted in the document				
45	Ability to create look up sets				
46	The ability to retrieve the document and change the index information after initial filing.				
47	The ability to track changes made to records				
48	Can it handle various formats				
49	Can documents be viewed in native format				
50	Check in/check out				
51	Version control - How many versions				
52	Audit log capabilities				
53	Print capability				
54	Workflow				
55	Record update capabilities				
56	Litigation hold				
57	Web-based system				

58	E-mail management				
59	Archival management				
60	Space management (Records Center)				
61	Barcode tracking				
62	•Automatic generation of barcodes for tracking Barcode tracking				
63	•Applies barcodes and color-codes on one easy-to-apply label strip				
64	•Generate new labels automatically with information from host database or keyboard				
65	Manage physical and electronic				
66	•Paper and electronic audit trail				
67	•Paper file tracking				
68	Reports				
69	•Processing history report				
70	•Retention reports				
71	•Missing documents report				
72	•Productivity report				
73	•Requestor exceptions report				
74	•File history report				
75	• Compliance report				
76	•Audit reports				
77	Filtering and searching friendliness.				
78	Document imaging and electronic tracking				
79	Web access to information				
80	Multiple retention schedule management				
81	Instant location of hard copy records				
82	Support TWAIN compliant scanners				
83	Remote scanning capability				
84	Chain of custody capability				
85	Security access controls				
86	Creates of alphabetic, numeric, or custom index filing systems				
	Vendor information				
87	On-Site Software training				
88	Off-Site Software training				
89	Web-Based Training				
90	Instructor led training				

91	Training manuals				
92	•Hardcopy				
93	•Electronic				
94	Is training part of the contract				
95	Vendor can create conversion plans				
96	Vendor can provide file strategy consultation				
97	Vendor can provide file-to-file conversions and data input into physical and electronic records management system				
98	Vendor supports unique requirements for physical and electronic records management				
99	How long has vendor been in business				
100	How many employees				
101	Where is the main headquarters located				
102	How many customers use the system				
103	What provisions have been made for users to protect their investment if the vendor company goes out of business				
104	What is the exit strategy for a company wishing to disengage from the vendor's system? Can the database be exported in native format with indexes?				
105	Five companies to contact for reference				
106	Is there in house tech support				
107	How long will in house tech support be provided from inception				
108	How is communication with tech support handled				
109	•Web interface				
110	•Email				
111	•Phone				
112	What kind of response time for support				
113	What are the costs associated with the various types of support				