



Take particular care of these areas, these often need further investigation

General Requirements

Supplier

- You might want to consider what type of company you want to engage with. Are you looking for a specific relationship, e.g. a development partnership? What information do you want to consider about the vendor – financial stability, market share, future plans? Any specifications you wish to make can be elaborated on within the Invitation to Tender (ITT) itself.

Access and Security



- What security model(s) do you need? A 'horizontal' model (access based on system functionality), a 'vertical' model (access based on data values) or both? Does it vary across different business components (e.g. do student marks' recording requirements differ from student application records?). Do you need access/sign-on to converge with other existing protocols, e.g. are you looking for single sign-on to all organisation applications?

Data

- Consider the typical level of 'set-up' data volatility (how much it changes) and if this requires regular reconfiguration (e.g. changing organisational structures) think how you might draft this in as a requirement in terms of flexibility and streamlining of reconfiguration.
- What capabilities do you need to extract, transform and load data from other systems? Does this include storage of items other than data, e.g. scanned documents?
- What are your data management requirements in terms of auditing, tracking, validation and error-trapping?
- Ensure you have covered statutory and legislative requirements - e.g. external auditing, external agencies, Freedom of Information Act and Data Protection Act compliance.
- In relation to the point above, consider specific requirements for archiving and destruction of data (this will vary between business areas).

Integration

- What interfacing capabilities do you need to other products? Do you need to consider packages such as messaging/email facilities as well as other business and learning systems? How do the interfaces need to operate – do they need to pull data from other systems or push data out? Do they need to be real time? Do you require workflow capabilities within the product or other automation requirements such as diary/scheduling or automatic triggering of reports?

Usability

- Do you have any specific requirements for the user interface, navigation, report layouts, help and search facilities? Do you require a web interface? Are you considering self-service or portal functionality?
- Consider the user base and training implications – does this lead to specific requirements such as drop-down lists containing intuitive descriptions rather than specialist codes? Do you need facilities for 'fast track' data entry?

Technical Requirements



- Consider the skillsets you have available to you to support the hardware and software. What are the limitations in terms of resources and training? Coupled with your IT architecture/strategy/policy, does this lead you to any specific requirements? What are your likely support requirements?
- Do you have specific customisation/localisation requirements, and if so **take care** to investigate whether the methods proposed by the vendor are supported (i.e. are upgrade-proof) and are not localisations that require consultancy and recoding every time you upgrade.
- Do you have existing or desired service standards to which the product must comply? What are your requirements for backup and disaster recovery facilities?
- Consider transaction and record volumes, peak processing times, and state scalability requirements.
- Are there resources or scheduling constraints whereby you need to state limits on frequencies and scale of upgrades and desired length of support for previous versions?
- Consider the number of environments you are likely to need (e.g. training, development, production and testing areas) and the resource implications of these.
- Are there any technical standards you require for interaction/interfacing/interoperability with other products?
- Do you want to specify any constraints about use of third party suppliers (sub-contracting)?
- Are there any stipulations you wish to make about licensing structures?
- Are there limiting on running software relating to the kit available to users, e.g. specification of PCs?

Functional Requirements

These detailed requirements should fall naturally out of your process review, but it is worth paying particular attention to:



- Any specialist areas of business - e.g. specific data requirements or reporting for professional bodies within a subject specialism or legitimately differing processes for a satellite campus;
- New requirements arising from aspirations of greater interoperability between systems.
- Do you require all functionality outlined to be in one core product or set of products from one supplier? If so state this up front – there could be third-party 'bolt-ons' hidden within the proposed solution with additional implications for licensing and ongoing maintenance.
- Remember to state expectations of coverage of statutory obligations such as for UCAS or HESA.