

Title: **Site Visit Worksheet**

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The following guidelines are based on a series of questions that may need to be raised during a site visit. Additional questions, based on specific user requirements, may have to be added to this document.

Component:

Version:

Company Visited:

Visit Site – Address:

Visit Site – Telephone:

Visit Date(s):

Key Personnel Consulted:

Overall Summary:

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VISIT QUESTIONS

A major purpose of a site visit is to see the software package in operation. While observing the package, determine the following:

- What is the equipment configuration?

- What part (if any) of the configuration was purchased to run the package?

- What system software is being run to support the package?
 - Operating System
 - Telecom Monitor
 - Compilers
 - Report Writers
 - Screen Painters
 - Security Software
 - Program Library Management Software
 - Special Utilities
 - Other

- Which applications had to be converted, or system software upgraded, to install the package?

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- How are data entry errors handled?
 - Numerical error code
 - Cryptic error message/listing
 - Clear concise message
 - Audio signal (bell, buzzer)
 - Other

- Does the operator often refer to an instruction manual to complete an operation, or does the system guide the operation?

- How often and for how long is the operator forced to wait for the computer to respond?

- Which reports/features does the software provide that are not being used?

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- How easily can ad hoc reports be obtained?
 - Simple menu selection
 - Simple parameter setting
 - Complex computer-user dialog

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Discussion Outline

1.0 Each of Installation

- What problems were encountered in adapting the package to the user's needs?

- How much time and effort was spent in the installation of the package (answer in terms of hours and elapsed time, both for the user personnel and package supplier personnel)?

- Considering Data Conversion:
 - How was the data conversion accomplished?

 - Did the installation support include file conversion programs?

 - How much time (hours and elapsed time) was required for file conversion?

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- How much calendar time was required for parallel operation with the previous system and what problems were discovered with the package system?
- What problems were encountered in moving the package operation from a test to an operational environment (e.g. problems with operating instructions, etc.)?
- What problems were encountered with year end processing during testing?

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1.1 Training

- What training (and how much) was required for:
 - Project team
 - Management personnel
 - Clerical personnel
 - Programming personnel
 - EDP operation personnel

- Who conducted this training and was any material supplied for on-going use?

- Where was the training conducted?

- How effective was the training provided to each group?

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1.2 Documentation

- How useful was the user documentation supplied and was additional documentation required?

- How useful was the operations documentation supplied and was additional documentation required?

- How useful was the system and programming documentation supplied and was additional documentation required?

- What was the quality of the documentation content? Consider:
 - Structure
 - Whether the documentation was easy to follow
 - Index and Table of Contents
 - Precise description of operations (e.g., referring explicitly to keyboard keys to be hit rather than using “code” names.)
 - Practicality of format (e.g., binder, size, etc.)

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1.3 Ease of Use

- How easy is the package to use (i.e., is input data easy to prepare/enter)?
- What bulk/mass maintenance features are used?
- Are the standard reports presented in useful formats? Describe briefly.
- How much clerical effort is required for input/output and control balancing?
- How many program errors were encountered? Describe nature and impact.

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- Determine the frequency and quality of new program release enhancements.

- Describe any features in the package that are not used.

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1.4 Report Writer

- Which functions is the package supplied report writer used for?
- What report writer training was provided to the user?
- What has the experience been with the report writer?

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1.5 Throughput/Efficiency

- What throughput and/or response time problems has the user experienced?
- What are the user's present volumes for all files?
- What is the level of response times for significant inquiries?

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1.6 Supplier Support

- How timely was the supplier in meeting scheduled commitments?
- How much turnover of supplier personnel was present during the project?
- Describe the promptness, quality and cost of service to alleviate errors?
- How does the user rate the supplier's attitude, co-operation and willingness to help?

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Overall Satisfaction

- What has been the worst experience encountered by the user implementing and operating the package system?

- What is the users overall evaluation of the strengths and weaknesses of this package? If the user had to do it over again, what would be done differently?

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