

Evaluating Repository Solutions

Checklist to Assist with the Evaluation Process

The following checklist is a suggested guide as to the considerations and potential elements that can be associated with the evaluation of repository software solutions. This is not intended to be an exhaustive checklist list but rather a base guide and starting point to provide initial direction for this process which can then be easily modified, customized or extended to suit the needs of your organization.

Prior to Evaluation

- Approximate budget (or lack of) has been identified or is known
- Consideration has been given to the differentiation between open source software versus proprietary software solutions and the corresponding product development and support available into the future
- Business requirements have been identified for the repository
- Potential repository solutions have been identified for evaluation
- Available information, specifications, manuals, etc has been sourced on systems to be evaluated
- Evaluation criteria has been determined and/or documented
- Staff involved in the evaluation process have been identified and have criteria or guidelines against which to test/evaluate
- A test or PILOT system has been established, or can be accessed by those required
- A timeline for evaluation has been determined

During Evaluation

- Support requirements for the repository solution have been identified: technical, maintenance, users
- Technical specifications have been determined including hardware and software
- Compliance with required standards, and interoperability requirements have been identified
- Solution has been evaluated based on pre-determined evaluation criteria
- Questions and issues raised from evaluation have been referred to the Vendor and suitable responses, resolutions and/or information has been received
- Exit strategies for migration of repository content/data to a future system have been investigated and are acceptable
- IT technical staff have reviewed and advised on hardware, software, maintenance,

support, storage and implementation issues

- Workflow models have been considered and are compatible with needs and can be supported
- Costs have been identified : hardware/software, (or hosting), licences, maintenance, support, staffing, ongoing costs, etc

On completion of Evaluation

- Document/report reflecting information gathered via the evaluation process, and or reporting against the evaluation criteria
- A list of issues that have arisen from the evaluation process that need to be noted, investigated further, or that may guide decision making
- A recommendation as to the outcome and/or the way forward

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