Interview Attendees:

The purpose of this document is to provide a framework for information gathering for newly initiated projects. The following questions will allow Information Services to understand the requirements and parameters of a requested project to better gauge needs for and impacts on university systems, processes, and resources.

An “ideal” project/system positively answers the following questions:

**Functional** – Does the system meet business requirements and support University goals?
**Infrastructure** – Can we support the system with existing facilities, resources, and skill sets?
**Security** – Does the system protect University data?
**Cost** – Is the proposed solution less costly than the problem (what is the net University impact)?

**Project Description (goals, benefits, impacts)**

1) What goal are you trying to accomplish for your department or division?

2) What problem will this solve and how will that be accomplished?

3) What are the expected benefits?
   a. Cost savings?
   b. Task reduction?
   c. Process efficiency?
   d. Enhancements/features to make the University more competitive?
   e. Other (please explain):

4) What offices/groups will benefit?

5) What offices/groups upstream or downstream will be impacted?
   a. How?
   b. Will they need to be involved in project discussions/decisions?

6) How many system users do you anticipate?
   a. Backend (Administrative)
   b. Users of the system

7) Who is the project sponsor (the person who can make financial and final decisions about the application)?

8) Who within the functional office will be the “application owner” (the contact within the department who supports the application itself and will support users of the system, creating/managing user accounts and security, managing upgrades, customer support, vendor access)?

9) Who will be the functional project manager (the person working with IT to install the application during this project)?
Potential Vendor/Product Information (if known)

1) Name of vendor(s)/company(s):

2) Name of product (and modules) you are interested in acquiring:

3) If the vendor has already provided technical recommendations and specs please email them to sysnetpmo@richmond.edu

4) Do you have a contract, licensing agreement and / or statement of work from the vendor?
   a. If yes, has it been reviewed by Univ. Counsel?

5) What other vendors or products did you research/consider?

6) What made you choose this vendor/product over the others?

Technical Specifications and Requirements

7) Will this system be hosted off site (SaaS) or on a server on campus?

8) If this is a hosted off campus we will need to have a technical call with the vendor to answer questions like the following.
   a. If we separate from the vendor, how do we get our data?
   b. How do users authenticate to the application, we accept local login or Shibboleth?

9) If this on a server on campus we will need to have a technical call with the vendor to answer questions like the following. If the vendor has already provided technical recommendations and specs please email them to sysnetpmo@richmond.edu
   a. Software/application installation
   b. Hardware requirements
   c. Operating System
   d. Database
   e. Network
   f. Test and/or Development System Needed
   g. Storage requirements
   h. Desktop/end user requirements

10) Will this system need to integrate with other systems (Banner, OneCard, external organizations, etc)?
    a. Which systems
    b. How?

11) What types of data will be stored/manipulated by this system? Data owner approval is required in many instances.

12) Are there any regulatory constraints associated with this data (i.e., FERPA, HIPAA, PCI, etc)? Which?

Project Parameters, Costs, and Support Needs

13) What is the desired timeline for this project?
    a. System ready for application owner to configure/test:
    b. Production/"go live" date:
14) What are the business cycle time constraints?

15) Can the project be broken into phases?

16) Is there already an approved budget for this project? If so, where will the budget come from and when will it become available?

17) If not, what are the plans for funding this project and when will you know if you have the budget?

18) Budget and expense items to be considered
   a. Initial hardware/storage/backup costs
   b. Initial software costs
   c. Vendor implementation/integration costs
   d. Training costs
   e. On-going (annual) hardware maintenance
   f. Five-year hardware replacement
   g. On-going (annual) software maintenance/vendor support

Information Services Assessment and Comments (recommendations, concerns, risks)