

IT Checklist for Buyers of Records Management Software



Be sure that the solution will work in your IT environment.

When evaluating an RM software solution, it is essential to look beyond the features and benefits to understand the technical aspects of the solution. Without a clear understanding of the technology involved, you run the risk of system incompatibility, project delays and performance issues.

We prepared this IT checklist to help you avoid these issues. You can use this document to:

- gather essential technical information from your RM software vendor
- debrief your internal IT team
- identify incompatibilities, gaps and other challenges that could derail the deployment of your solution.

Every reputable vendor should have the following information readily available. For example, **you can get a full list of technical requirements for TAB FusionRMS [here](#).**



Software / Vendor Background

1. How long have you been in business?

2. How long has the software been commercially available? What is the release history?

3. Who are some of your current clients and how long have they been using the software? Can you provide references or testimonials?



Updates

1. How are we alerted about essential updates and patches? How are they performed? Can we make the updates ourselves?

2. Are we upgraded to the latest versions whenever they are released? Do we have to pay for new versions?

3. Do we receive copies of the software?



System Administration

1. Is it possible to administer and configure the software ourselves?

2. What training, help and documentation do you provide for administrators?

3. Which administrative functions (e.g. updates, user management, configuring reports) can we perform in-house?

4. Which administrative or configuration functions require your assistance? Is that assistance included in our software fees or does it cost extra?

5. What kind of technical support do you offer for administrators?





User Training And Support

1. What training programs do you offer for end users? Are these included in our software fees?

2. What kind of instructional documentation is available for the software? (e.g. manuals, tutorials, videos)

3. What kind of help and troubleshooting is available when users are having issues?

4. What are the full details of your end-user technical support program? (e.g. phone numbers, hours of operation, turnaround times, limits)



Compatibility

1. What are the high-level system and network requirements for the software?

2. Are there any technologies, hardware or software that are known to be incompatible with your solution?





Backup, Import, Export

1. How is system backed up? Can we do this ourselves?

2. Can we export data for use in other software or systems? Can we import data from other systems or software?

3. Can we export data for use by staff or partners that don't have access to the software?

4. Can we import data from other systems or software?



Security And Disaster Recovery

1. What security measures are in place for the solution?

2. How do you control access to system data?

3. Do you have disaster recovery plans in place to keep the software available in the event of emergencies or disasters?



Hardware Requirements

What are the required or recommended specifications for the following hardware components of the solution?

1. System Server

(This is the dedicated computer that hosts the software and in some cases the data created and used by the software.)

Operating System (OS):

e.g. Windows Server 2012

OS Version / Software Pack:

e.g. SP 1, SP 4

Installed Frameworks or Services:

e.g. Microsoft .NET framework, MS IIS, Windows Mobile Device Center, SMTP server

Processor Speed: _

e.g. 1 GHz 32-bit (x86), 1.4 GHz 64-bit (x64)

System Memory (RAM):

e.g. 2 GB

Hard Disk Space (for the application):

_____ GB

Hard Disk Space (file storage):

_____ GB (TAB recommends > 40 GB)

Hard Disk Space (document images):

_____ GB

Database Server Software:

e.g. SQL Server 2014

Database Server Software Pack:

e.g. SP 1, SP 4

How much space do you need for document images?

Server hard disk space can become an issue when implementing document imaging. If you are planning to scan your documents, keep in the mind the following when planning how much hard disk space to allocate:

- Average image size. This will depend on your business requirements. Documents can run from 30KB - 45KB for basic text up to several MBs each document for rich PDFs.
- How many documents you need to scan for the “back file” conversion
- How many new documents will be scanned per workday
- How long, on average, a document image will remain in the system

2. Server Workstation

(This is the dedicated PC used to administer the server.)

Operating System (OS)

e.g. Windows 8

OS Version / Software Pack:

e.g. SP 1, SP 4

Processor Speed:

e.g. 1 GHz 32-bit (x86), 1.4 GHz 64-bit (x64)

System Memory (RAM)

e.g. 2 GB

Graphics Memory (RAM)

e.g. 128 MB

Hard Disk Space (application):

_____ GB

Hard Disk Space (file storage):

_____ GB

(TAB recommends > 40 GB)

Office Applications:

Browsers:

| No | Yes | Version # |
|----|-----|-----------|
|----|-----|-----------|

Microsoft Internet Explorer

| | | |
|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
|--------------------------|--------------------------|-------|

Firefox

| | | |
|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
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Chrome

| | | |
|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
|--------------------------|--------------------------|-------|

Safari

| | | |
|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
|--------------------------|--------------------------|-------|

Other _____

| | | |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

3. End-user Workstations

(These are the PCs that staff will use for everyday tasks.)

Operating System (OS) _____
e.g. Windows 8

OS Version / Software Pack: _____
e.g. SP 1, SP 4

Processor Speed: _____
e.g. 1 GHz 32-bit (x86), 1.4 GHz 64-bit (x64)

System Memory (RAM) _____
e.g. 2 GB

Graphics Memory (RAM) _____
e.g. 128 MB

Hard Disk Space (application): _____ GB

Hard Disk Space (file storage): _____ GB
[TAB recommends > 40 GB]

Office Applications: _____

Browsers:

| | No | Yes | Version # |
|-----------------------------|--------------------------|--------------------------|-----------|
| Microsoft Internet Explorer | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Firefox | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Chrome | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Safari | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Other _____ | | | _____ |



Storage Devices

What are the recommended technologies for mass storage of images and other documents?

For image storage under 500 GB: _____

For image storage greater than 500 GB _____

For write-once, read-many (WORM) storage: _____



Printing And Scanning Devices

What are the requirements for printing and scanning devices?

Label printers

Color inkjet printers:

Color laser printers:

Mobile bar code scanners:

Desktop bar code scanners

Document scanners:

Depending on your business and requirements, there may be other technical factors to consider. Be sure to ask your prospective provider.



Learn More:

Please contact a member of our team if you need any assistance with the technical aspects of records management software.