Purpose

The purpose of this document is to initiate a request for the university to perform a Software Assessment (technical evaluation) of a potential new technology or tool. Please fill out this form and return it to the Software Fund Team along with the vendor’s documentation and completed technical questionnaire. Email to: [software@andrew.cmu.edu](mailto:software@andrew.cmu.edu)

Vendor & Solution Overview

|  |  |
| --- | --- |
|  |  |
| Vendor Name: | [Vendor Name] |
| Product Name: | [Product] |
| Vendor Contact: | [Contact information] |
| Purchasing Department: | [CMU department procuring solution] |
| Primary CMU Contact: | [Primary point of contact for this process] |
| Solution Type: | [Type of solution being purchased (i.e. Content Management System, Form Management)] |
| Solution Description: | [High level overview of the solution] |
| Website / Documentation: | [Link to solution website] |
| Is the university contracts office involved? | [Yes or No; if yes, is there a contract currently under review?] |
| IS THE PROCUREMENT SERVICES TEAM INVOLVED? | [Yes or No; if the purchase is >$150,000 procurement shall be involved in the process?] |

Goals & Objectives

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| Problem statement: | [What is the problem this software solution is trying to solve?] |
| Primary Use-Case: | [Please describe how this application will be used] |

Data & Technical Overview

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| --- | --- |
|  |  |
| Data overview: | [What type of CMU data will be stored in this application?] |
| Data Classification: | [What is the classification of data with which this system will interact per: https://www.cmu.edu/iso/governance/guidelines/data-classification.html] |
| Private & Restricted Data: | [If the answer above includes Private and/or Restricted, please list those data points (i.e. Personally Identifiable Information, FERPA, HIPAA, Export Control, etc.)] |
| Data steward: | [Is the data-owner / data steward aware?] |
| Integrations: | [What integrations with incumbent systems are anticipated? If any, please list] |
| User Profile: | [What type of users will access this system (i.e. students, faculty, staff, internal, external)] |
| Impact: | [How many users are anticipated to access the system?] |