Software as a Service (SaaS) Checklist

 Considerations prior to acquiring a SaaS solution.

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|   |   |   |   |  **Comments** |
|  **Client** |   |  |   |   |
| Have you clearly identified your business requirements and processes regarding this software? | yes | unsure | no |  |
| Are you confident that the software meets your business requirements and process? | yes | unsure | no |   |
| Have you ensured there are no other systems on campus that can meet your needs? | yes | unsure | no |   |
| Have you checked that there are no other units on campus looking to fulfill the same needs? | yes | unsure | no |  |
| Have you reviewed at least two other products? | yes | unsure | no |  |
| Will the application be used for no more than 3 years? | yes | unsure | no |   |
| Did the system demonstration address your use cases? | yes | unsure | no |   |
| Have the impacts to your unit’s roles and responsibilities been identified? | yes | unsure | no |  |
| Do you have the data you need for input into the system? | yes | unsure | no |  |
| Have impacts to your business processes been identified?  | yes | unsure | no |   |
| Are you prepared to change your business processes to align with the proposed solution? | yes | unsure | no |   |
| Do you know of other Canadian Universities using this software? If yes, have you consulted with them? | yes | unsure | no |  |
| Has SMS been involved or consulted? | yes | unsure | no |  |
| **Data** |   |   |   |   |
| The software needs to integrate with another system on campus: | no | unsure | yes | If “yes” the proposal will need to be reviewed and approved through IT Governance    |
| * CCID - single sign-on
 | no | unsure | yes |
| * PeopleSoft – Campus Solutions, HCM, Financials
 | no | unsure | yes |
| * eClass
 | no | unsure | yes |
| * Google
 | no | unsure | yes |
| Are the data ownership, sharing, retention, encryption, and portability compliant with the U of A policies? | yes | unsure | no |
| Do you know how you will get the data out of the system when you wish to stop using it? Will it be in a format that can be archived and/or moved into a different service? Have provisions for data return been agreed to in the contract? This might be required, for example, if you decided to switch to another service. | yes | unsure | no |   |
| Private, personal or sensitive data will be used in the system | no | unsure | yes | If “yes” the software will need a security and privacy review and may need to go through the appropriate governance committee |
| **Support** |   |   |   |   |
| Will the vendor provide helpdesk support for the Application? | yes | unsure | no |   |
| Does the support address your needs? | yes | unsure | no |   |
| Does the training content and delivery method meet your needs? | yes | unsure | no |   |
| Is there ongoing support and maintenance provided by the vendor? | yes | unsure | no |  |
| If ongoing vendor support is provided, do they do so onsite, remotely, or both? | yes | unsure | no |  |
| **Product** |   |   |   |   |
| The product has been available over 2 years | yes | unsure | no |   |
| The product is upgraded at least once a year | yes | unsure | no |   |
| The product is used by over 100 organisations | yes | unsure | no |   |
| The references from users have been positive  | yes | unsure | no |   |
| The service contract includes all costs for:  |  |  |  |  |
| * User Licenses for all your users
 | yes | unsure | no |   |
| * Storage
 | yes | unsure | no |  |
| * Training
 | yes | unsure | no |  |
| * Support
 | yes | unsure | no |  |
| * Upgrades
 | yes | unsure | no |  |
| * Data repatriation
 | yes | unsure | no |  |