

Database Evaluation and Integration Checklist

Directions:

Step 1:

Determine the content of the database and the manner in which it is stored and distributed within the target company. The Database Content checklist identifies 10 areas of critical data.

Step 2:

Now, for each of the 10 critical data sets, create a profile using the Data Profile worksheets. The checklists are structured in a hierarchal basis with the data or content being at the top so that each set of data can be individually profiled. These individual profiles can be aggregated into a system profile.

Step 1: Database Content Checklist

Target Company		Prepared By	
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Does the target's database include any of the following ten critical data:

- Contact information**
- Personal and business information**
- Customer order history and preferences**
- Order and fulfillment dates**
- Credit information and payment history**
- Prospect inquiries and sales in process**
- Service and support records**
- Website registrations**
- Demographic information about customers and prospects**
- Response to marketing campaigns**

How is the target's data stored and distributed:

- In one integrated system –
 - On a single machine
 - Over a LAN
 - Over a WAN (private)
 - Over a WAN (web-based)
- Across several software/hardware configurations –
 - On a single machine
 - Over a LAN
 - Over a WAN (private)
 - Over a WAN (web-based)

Data Collection Methodology:

- Who inputs the data?
- At what point is the data entered?
- How is the data validated?
- How “real-time” is the data?
- What is the source and history of the data?
- What is the time horizon for the available data?
- Is data from any third-party source appended to the company’s data?

Application and Uses of the Data:

- Who uses the data
- How is the data used
- Is there a library of standard searches and sorts? If so, obtain a list.
- Can custom searches be performed?
- What level of competence is required to perform a custom search?
- Is there a library of standard reports? If so, obtain a list.
- Can custom reports be generated?
- What level of competence is required to prepare a custom report?
- Are users granted full access or can access be limited?
- Is the data integrated with any other systems
 - Which system(s)?
 - How is the data used?

System Administration and Management:

- Who manages the system?
- What are their credentials and experience?
- Is a procedures manual available?
- Describe data backup procedures and policy?