

iii. Connections to clients:

2. Workstation Requirements (Client)

a. What are the workstation requirements for this product?

i. Processor: _____

ii. Memory: _____

iii. Storage: _____

iv. Network: _____

v. Operating System: _____

vi. Other: _____

b. Are there any firewall requirements to allow the client to run as designed?

i. Connections to internal servers (Database, Email, Other):

ii. Connections to external servers (Updates, Licensing, Content, Other):

iii. Connections to external services (Support, Training, Other):

c. Is there any prerequisite software installation required?

i. Java (JRE) Version: _____

ii. .NET Framework Version: _____

iii. Visual C++ Redistributable: _____

iv. Adobe Flash Version: _____

v. Adobe Reader Version: _____

vi. Microsoft Silverlight Version: _____

vii. Other Software and Version: _____

d. Are there any additional peripherals required in order to use this product? _____

i. What are the peripherals? _____

ii. What is the estimated cost of the peripherals? _____

iii. Does your company provide the required peripherals? _____

e. Can this software run in a Citrix XenApp or RDS environment as a published application? _____

f. How are updates to the client installed?

- i. Can a normal user install updates without local administrator rights? _____
- ii. Can updates be installed remotely? _____
- iii. Do updates require manual installation? _____
- iv. How often are software updates released? _____

3. Browser Requirements (Cloud)

- a. What are the browser requirements for this product? _____
- b. Does this product require any third-party add-ons or plug-ins? _____
 - i. If so, what are they? _____

Section III – Technical Support

- 1. What are the methods for contacting technical support? _____
- 2. What are the hours of operation for technical support? _____
- 3. Who can call in for technical support questions? _____
- 4. How do you authenticate users calling for support? _____
- 5. How do you authenticate users requesting account changes? _____
- 6. Will technical support routinely ask for remote access to client or server desktops? _____
 - a. If so, what software do you use to establish these connections? _____

Section IV – Data Integrity and Security

- 1. Is this software used to store or transmit PII or PCI data? _____
- 2. Is this software certified to be compliant with the latest PCI standards? _____
- 3. Is this software certified to be compliant with the any other industry standard? _____
- 4. What safeguards are in place to secure company data? _____
- 5. Are all IP connections encrypted? _____
- 6. What information is being stored? _____
- 7. How long is information stored? _____
- 8. What restrictions can be placed on the type of information stored? _____
- 9. If our data is stored offsite, how will it be isolated from other user's data? _____
 - a. Separate VM instance for our account? _____



- b. Separate database on a shared server? _____
 - c. Separate tables in a shared database? _____
 - d. Shared tables with unique account identifiers? _____
 - e. Some other method? _____
10. If data is stored on a SQL server, does the application use a service account to access the database, or must individual users be given access to the database?

11. Can information be exported? _____
12. What formats are used when exporting data? _____
13. Can all data be exported at once? _____
14. Are there logs detailing who has exported data? _____
15. Can files be uploaded to the server? _____
16. What restrictions are available on who can upload files? _____
17. What restrictions are available on file types that can be uploaded? _____
18. Are these restrictions user modifiable? _____
19. Are files scanned for malicious content? _____
20. Can files be downloaded from the server? _____
21. What restrictions are available on who can view or download files? _____
22. What types of restrictions can be placed on users or groups? _____
23. Can restrictions be implemented on who can make changes to data? _____
24. Are logs easily accessible for data that has been changed and who made those changes? _____
25. Do these logs include changes made by internal and external support personnel? _____
26. Are logs easily accessible for data that has been viewed and who viewed that data? _____
27. Do these logs include data viewed by internal and external support personnel? _____
28. Can IP restrictions be implemented on where this product can be accessed (Cloud based)? _____
29. Can a demo account be created to review available settings and restrictions? _____
30. Is a user guide or admin guide available for review? _____

