

## **Resource Evaluation Guidelines**

- ❖ All resource evaluations must have a corresponding SR entered into the Service Request database to track results.
- ❖ Obtain product specifications and purchase justification from the customer who will be using the product. These details should be entered into the SR's Problem Description field.
- ❖ Record time spent and actions taken, including meetings, calls, or emails with the customer and vendors in the Staff Referral Comments field.
- ❖ If the customer is not a member of the IDT division, then provide a copy of this information to the IDT Operations Manager for review and confirmation. If the customer is a member of the IDT division, consider the above information confirmed.
- ❖ Once specifications and purchase justification are confirmed, search the product on the Internet. Associated search criteria:
  1. Print hardcopy of manufacturer's product specifications and system requirements.
  2. Give priority to the manufacturer, unless they push sales to distributors. If distributors handle sales, then always check with GovConnection or CDW Government, Inc (see Vendor database) for possible quotes on the product.
  3. Look for differences in price, length of warranty, availability of extended warranties, and delivery times from a variety of vendors. Print hardcopy of information supporting those differences.
  4. All vendors must have a brick and mortar address and their contact information must be printed for Tech Support, if not already in the Vendor database.
  5. All vendors must accept a PO, some exception can be made for Credit Card. Print hardcopy of their purchasing requirements.
  6. Provide at least 3 vendors, unless item is sole source/sole brand and then provide additional justification for sole source/sole brand.
- ❖ Provide customer and Tech Support with hardcopy of the Internet search results, when the evaluation is complete. This will facilitate turning the

evaluation into an actual purchase, if approved by management.

- ❖ Complete final comments and close the associated Service Request for the Resource Evaluation.