Commissioning and completions software: evaluation scorecard

Yellow cells are for you to fill in. Free template from Deskely · deskely.com/resources/commissioning-software-evaluation-template

Evaluation for (project or organisation)	Document number	Revision

Evaluation team	Date	Decision due

Score each vendor 1 to 5 on what you saw in the demo or the trial, not on what you were told. 1 = not available 2 = only with a workaround or custom work 3 = meets the need with configuration 4 = meets it well as standard 5 = meets it well and proven on projects like yours. Weights are an example: set your own, they must total 100 %. Mark the criteria a vendor must meet; a must-have scored below 3 is flagged.

Summary

Weights: 100 % (OK) **Criteria: 20** **Vendors named: 0** **Highest weighted score: none scored yet**

					Vendor names (fill in)				
No.	**Criterion**	**What good looks like**	**Must-have**	**Weight (%)**	**Vendor 1**	**Vendor 2**	**Vendor 3**	**Vendor 4**	**Notes**
TAG REGISTER AND SYSTEMISATION									
1	Tag register with the system and subsystem hierarchy	Every tag in one register, split by system and subsystem, with your own numbering kept	*Yes*	*6*					
2	Building the register from drawings and existing lists	Import from Excel and engineering data; a clear account of how the register is built from P&IDs and how long it takes		*5*					
3	Drawing revisions and change	A new revision shows which tags and signed records it touches, with history kept		*3*					
ITRS AND CHECK SHEETS IN THE FIELD									
4	Your own ITR and check sheet templates	Your forms set up without code, by your own administrator, and versioned		*5*					
5	Tablet and phone app that works offline	Records filled in, photographed and signed without signal, then synced without conflicts	*Yes*	*6*					
6	Checks as records are filled in	Readings checked against range and tolerance, required fields and photos, and who may sign		*5*					
PUNCH									
7	Punch raised in the field	Raised on the walk with a photo, the tag and its location, then assigned to a discipline or contractor		*4*					
8	Punch categories and closure	Category A and B, closure with evidence, and open A items blocking the certificate		*4*					
TEST PACKS									

No.	Criterion	What good looks like	Must-have	Weight (%)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Notes
9	Pressure test packs	Packs built from the line list, with test limits, spades and blinds, and reinstatement tracked to closure		*6*					
CERTIFICATES AND HANDOVER									
10	Completion certificates	MC, RFC, RFSU and handover certificates per subsystem, checked against open ITRs and punch before signature	*Yes*	*5*					
11	Handover dossier	Dossier assembled from the records already held, with gaps shown before the client review		*5*					
DOCUMENTS AND DRAWINGS									
12	Drawings linked to tags	Open the drawing from the tag and the tag from the drawing; markups and revision control		*5*					
REPORTING									
13	Progress reporting	Progress by subsystem, system and area; S-curves; export to Excel		*4*					
14	Reports and dashboards without the vendor	Your engineers build and share reports and dashboards themselves		*3*					
INTEGRATIONS									
15	Interfaces and API	Working interfaces to engineering data, document control, planning and maintenance systems; a documented API		*6*					
SECURITY AND HOSTING									
16	Hosting, data location and access	Hosting options, data location, backups, single sign-on and roles; your data returned in full at the end	*Yes*	*4*					
17	Security assurance and audit trail	Independent security certification or audit, and a trail of every change and signature		*4*					
IMPLEMENTATION									
18	Time to first record on site	A dated plan from contract to the first ITR signed on site, with named roles on both sides		*6*					
PRICING MODEL									
19	Pricing basis and what is extra	A clear basis (users, tags, project or licence), contractor access, and what would cost extra as scope grows		*6*					
REFERENCES									
20	Comparable references	Projects of your type and size, with people you can call who used it daily		*8*					

No.	Criterion	What good looks like	Must-have	Weight (%)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Notes
RESULTS									
Weights total (%)				**100**	**Weights total 100 %: OK**				
Criteria scored					0 of 20	0 of 20	0 of 20	0 of 20	
Weighted score (out of 5)									Over the criteria scored so far
Weighted score (%)									
Must-haves scored below 3									Any number above 0 needs a decision
Rank									

Sign-off	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

Demo questions to ask every vendor

Ask each vendor the same questions, on your own drawings and data where you can. Note what you saw, not what you were told.

Evaluation for	Demo dates	Attended by

Answered

Vendor 1: 0 Vendor 2: 0 Vendor 3: 0 Vendor 4: 0 of 23 questions

No.	Area	Question	What a good answer shows	Vendor 1	Vendor 2	Vendor 3	Vendor 4
1	Register	Show the tag register for one system on a real project. How was it built, and how long did it take?	A live project, the source of the data and an honest time				
2	Register	Issue a new revision of one drawing. What happens to the tags and the records already signed against it?	Affected tags and signed records flagged; history kept				
3	ITRs	Switch the tablet to flight mode, fill in an ITR with a photo, sign it, then reconnect.	Works offline end to end and syncs cleanly				
4	ITRs	Enter a reading outside its tolerance. What happens before the signature?	The value is flagged before the record can be signed				
5	ITRs	Set up one of our check sheets as a template. Who does it, and how long does it take?	Done by your own administrator, without code, in hours or days				
6	Punch	Raise a punch item on the walk, assign it to a contractor and close it with evidence.	Photo, tag and location captured; closure needs evidence				
7	Punch	Show an open category A item stopping a certificate from being signed.	The certificate is blocked and the reason is shown				
8	Test packs	Build a test pack from a line list extract. How are spades, blinds and reinstatement tracked?	Every temporary item listed and ticked back before closure				
9	Certificates	Try to sign an MC certificate for a subsystem with an open ITR.	Signature refused, with the open records listed				
10	Dossier	Produce the handover dossier for one subsystem. How are missing records shown?	Assembled from the records, gaps listed				
11	Reporting	Show progress for one system by subsystem and export it to Excel.	Live figures from the records, a clean export				
12	Reporting	Can our engineers build a new report without you?	Yes, shown in the demo				
13	Integrations	Which interfaces run today, with which systems, and where is the API documented?	Named systems in production and public documentation				

No.	Area	Question	What a good answer shows	Vendor 1	Vendor 2	Vendor 3	Vendor 4
14	Access	How do contractors and subcontractors get access, and who pays for it?	A clear, written answer that scales with the project				
15	Security	Where is our data hosted, who at your company can see it, and how do we get all of it back at the end?	Named region, access controls and a full export				
16	Security	Show the audit trail for one signed record.	Every change and signature with user and time				
17	Implementation	Walk us through the plan from contract to the first ITR signed on site.	Dated steps, named roles, what you need from us				
18	Implementation	What do you need from us, and when: data, templates, people?	A specific list with dates				
19	Pricing	What exactly is priced, and what would be extra: users, contractors, storage, templates, integrations, support?	A full list in writing, no surprises				
20	Pricing	How does the price change if the scope doubles, or the project runs a year late?	A formula you can check				
21	References	Name two projects of our type and size, and let us speak to people who used it daily.	Contactable users, not only sponsors				
22	Product	How often is the product updated, and how are updates tested and released?	A regular cycle, tested first, no downtime				
23	Product	What happens to our data and records if we stop using the product?	A full export in open formats				