

Trinity U ERP Vendor Bid Evaluations

Last Modified on 03/04/2020 4:44 pm MST

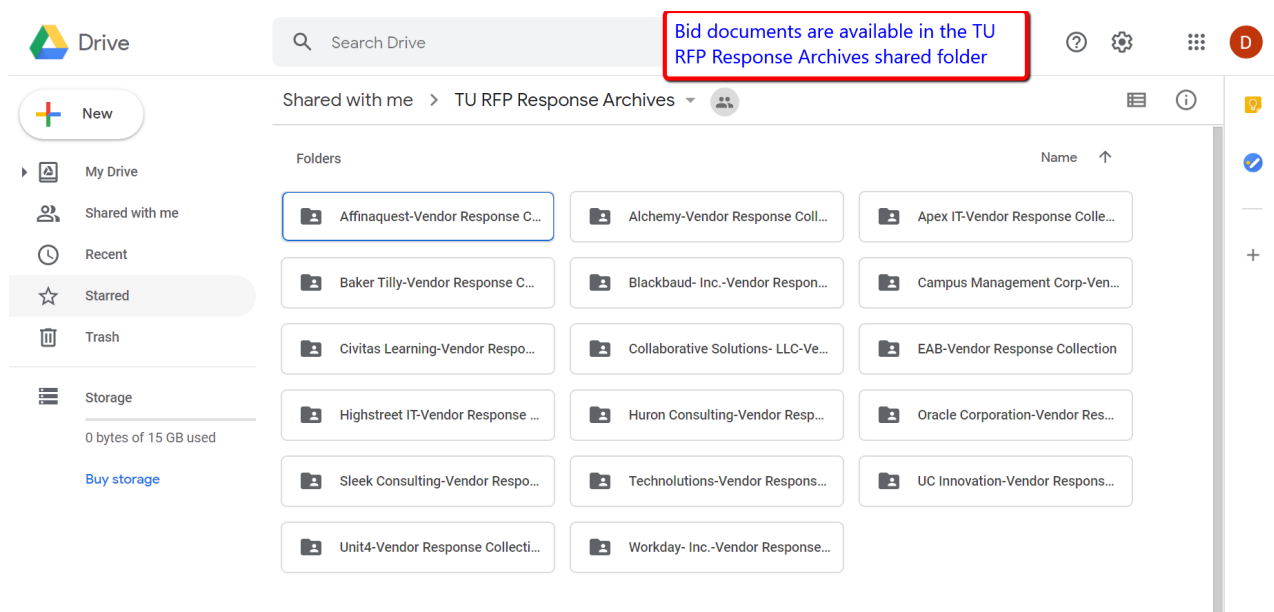
Welcome

Thank you for agreeing to participate in the evaluation of vendor responses to our **Trinity University RFP 12202019 ERP Request For Proposal**.

Please read on for an explanation of the evaluation plan and how we will be using DecisionDirector to collect your ratings.

Bid Documents on Shared Drive

This evaluation activity is focused on the vendor bid documents.



RFP Requirement Rating Scale

Requirements within a category are weighted equally and rated according to the following scale.

Requirements Rating	Score	Definition
Exceptional	10	The requirement is satisfied in an exceptional manner
Good	7	The requirement is satisfied in a manner that stands out
Acceptable	4	The requirement is satisfied
Marginal	1	There are faults in how the requirement is satisfied
Unacceptable	0	The requirement is not satisfied

Accessing DecisionDirector

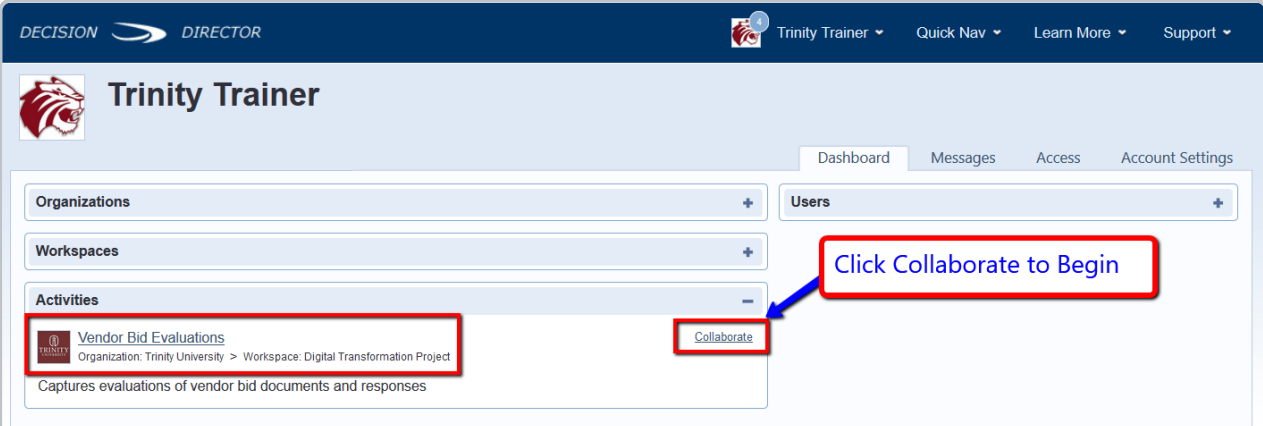
If you do not already have a DecisionDirector account, click [here](#) to learn how to create one and how to accept an invitation to participate in this evaluation activity.

Video Walk-Through of the RFP Evaluation Process

Click [here](#) for a complete walk-through of this process.

Providing Ratings in DecisionDirector

Once you've logged in and accepted the invitation to participate, you will find the evaluation activity on your dashboard. Click the "Collaborate" link to reveal the list of evaluation documents. Use can use either the list or the tree on the left to navigate to the document(s) and requirements to which you have been assigned.



DECISION DIRECTOR

Trinity Trainer

Dashboard Messages Access Account Settings

Organizations +

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Activities -

Vendor Bid Evaluations
Organization: Trinity University > Workspace: Digital Transformation Project
Captures evaluations of vendor bid documents and responses

Collaborate

Click Collaborate to Begin

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Powered by the DecisionDirector® platform

Your DecisionDirector will look something like this

DECISION
DIRECTOR

Trinity Trainer
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Activity: Vendor Bid Evaluations
Organization: Trinity University > Workspace: Digital Transformation Project

Dashboard
Collaborate

Step: Eval collection (3/2/2020 5:00 AM MST - 3/13/2020 8:00 PM MST)

Documents
Collaboration Summary

List

- BID-Affinaquest
- BID-Alchemy
- BID-Apex IT
- BID-Baker Tilly
- BID-Blackbaud
- BID-Campus Management Corp
- BID-Civitas Learning
- BID-Collaborative Solutions
- BID-EAB
- BID-Highstreet IT
- BID-Huron Consulting
- BID-Orade Corporation
- BID-Sleek Consulting
- BID-Technolutions
- BID-UC Innovation
- BID-Unit4
- BID-Workday

Collaboration Summary

Bookmarks: 0
Instructions
Step Mode: Edit

Document	My Contribution
	Complete Complete/Total
BID-Affinaquest	4% 3 / 69
BID-Alchemy	0% 0 / 48
BID-Apex IT	0% 0 / 67
BID-Baker Tilly	0% 0 / 48
BID-Blackbaud	0% 0 / 72
BID-Campus Management Corp	0% 0 / 72
BID-Civitas Learning	0% 0 / 48
BID-Collaborative Solutions	0% 0 / 48
BID-EAB	0% 0 / 68
BID-Highstreet IT	0% 0 / 48
BID-Huron Consulting	0% 0 / 48
BID-Orade Corporation	0% 0 / 72

Each vendor has their own bid evaluation document

Each has only those items for which the vendor provided a response

Click on the vendor name for each you will evaluate

List of Evaluation Documents

Entering Your Ratings

You can use the tree on the left to open any document and navigate to the sections of interest. Each section contains one or more requirements, and each requirement has its own evaluation form.

For each requirement, select the rating that you feel is appropriate for the vendor you are evaluating, and please provide a brief (or longer if necessary) statement in the Rating Comment field explaining your rating.

If you desire additional information from the vendor for the requirement, check the Inquire Further box and explain what you need in the Inquiry Request field.

You will be prompted to Save your work. You do not have to complete all of your ratings in one sitting, You can come back at anytime to continue or alter your ratings.

The screenshot displays the DecisionDirector web application interface. At the top, the header includes the 'DECISION DIRECTOR' logo and navigation links for 'Trinity Trainer', 'Quick Nav', 'Learn More', and 'Support'. Below the header, the page title is 'Activity: Vendor Bid Evaluations' for 'Organization: Trinity University' and 'Workspace: Digital Transformation Project'. The main content area is titled 'Step: Eval collection (3/2/2020 5:00 AM MST - 3/13/2020 8:00 PM MST)'. On the left, a 'Documents' sidebar lists various bid items, with '2.1.1 - Account References' highlighted. The main panel shows the evaluation form for this item. The form includes a 'Responses' section with a progress indicator '1/1 Items answered, 0 answers to be saved.' and buttons for 'Save' and 'Cancel'. The evaluation form itself has a title '2.1.1 - Account References' and a description: '1 - Provide three references and contact information to verify bidder direct experience in servicing accounts of a similar size, complexity, and business volume to Trinity University. Trinity University prefers references from similar sized liberal arts institutions. For each reference Bidder must state contact names and telephone numbers and a brief description of the nature and outcome of each project. Ensure that contact information includes name, title, address, e-mail address, and phone number of each reference and that you have verified that this is current information for these individuals/companies.' Below the description, there are two columns: 'Rating' with a dropdown menu set to 'Good' and 'Rating Comment' with a text area containing 'I felt that they...'; and 'Inquire Further' with a checkbox and 'Inquiry Request' with a text area containing 'would like to know more about...'. At the bottom right, it says 'Last saved: 3/3/2020 6:34 PM MST' and 'Input Complete'.

Example of a Requirement Evaluation Form

Questions?

If you have questions about the requirements review process, please contact:

David Perales, Senior Director for Operations, ITS

210-999-7475

Dperales@trinity.edu

For questions about DecisionDirector, please contact support@advantiv.com.