UR Finance/HCM Requirements Review

UR Finance/HCM Requirements Review Instructions

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Welcome

Thank you for agreeing to review requirements in advance of the upcoming RFP.

The requirements you will review in this exercise were derived from the many workshops recently conducted by Moran Technology Consulting.

The purpose of this review is to confirm the scope, priority, and articulation of the capabilities that you desire in a new ERP (Finance and HCM) platform. You will also be given the opportunity to comment on any requirement.

The result of this review activity will be a a set of well-defined requirements that will be incorporated into the upcoming RFP and referenced throughout the vendor evaluation phase.

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

Video Overview

The following video covers:

- an overview of the project

- the purpose of the requirements review

- receiving the emailed invitation from DecisionDirector

- logging in to DecisionDirector

- navigating through the requirements

- providing and saving review input, and

- bookmarking items for future reference

To access the recording, click on the link below. For optimal viewing, please use the Full Screen option in the upper right of the video.

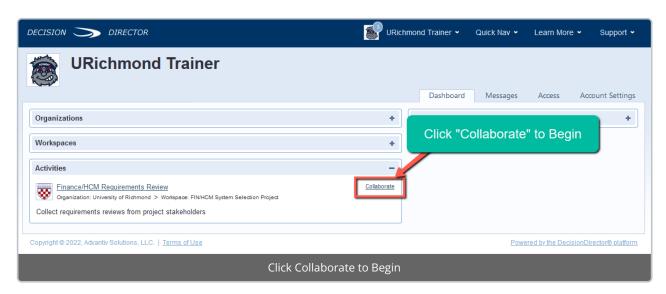Requirements Review in DecisionDirector

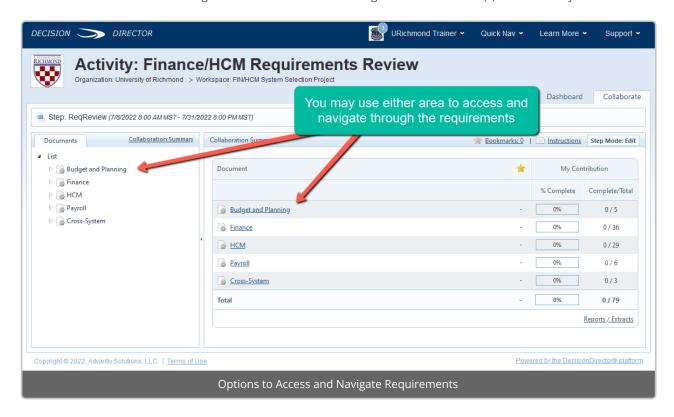# Accessing DecisionDirector

For access instructions, see:

UR Requirements Review - Accept Invitation

Reviewing Requirements in DecisionDirector

Once you've logged in, you will find the requirements review activity on your dashboard. **Click the "Collaborate" link to reveal the list of requirements documents.**
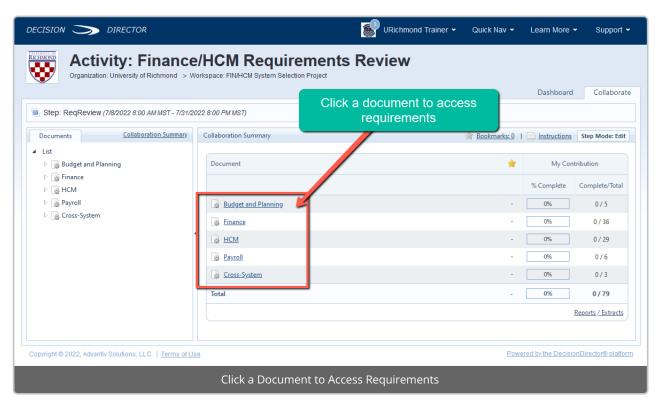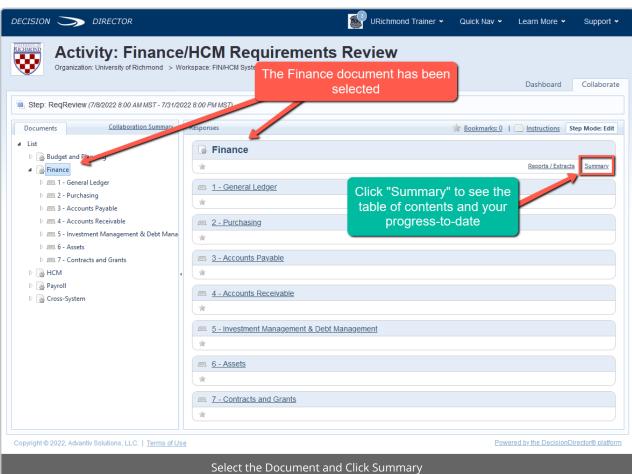

Click Collaborate to Begin

You can use either the list on the right or the tree on the left to navigate to the document(s) of interest to you.
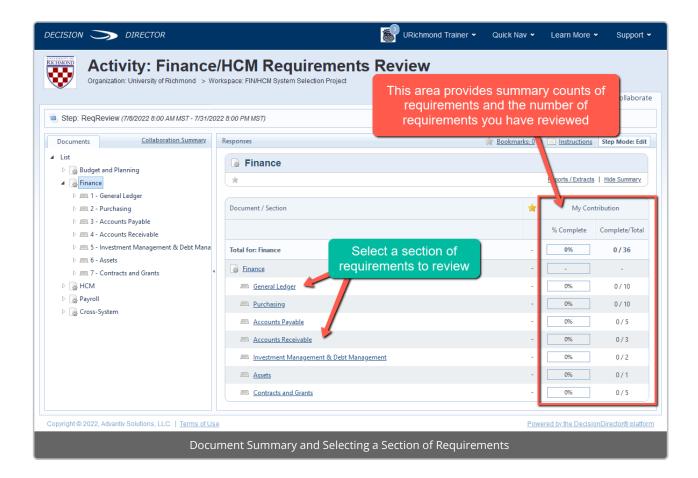

Options to Access and Navigate Requirements

Selecting a Document

Click on a document title to bring that document into focus. Click the Summary link to see even more, including your progress to-date.

Click a Document to Access Requirements

Select the Document and Click Summary

Document Summary and Selecting a Section of Requirements
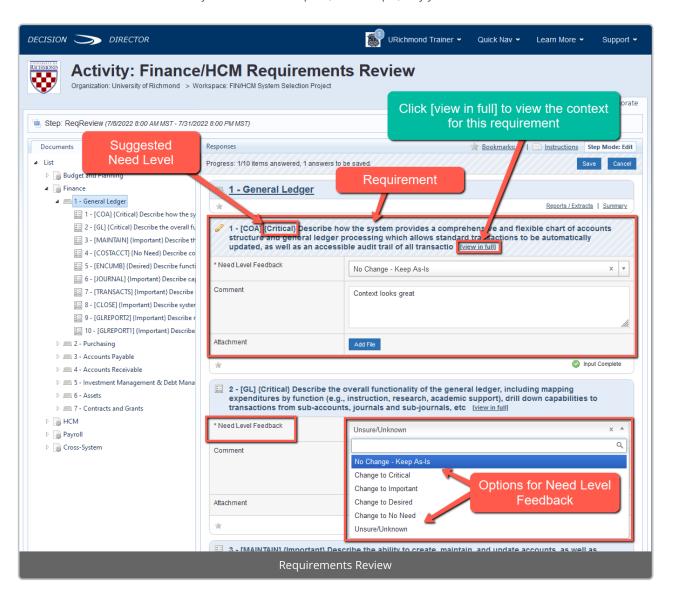
Entering Your Reviews

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 review form. You are not expected to review all requirements - but you certainly are free to look around. For your review, though, please focus on areas of your specific work, interest, or expertise.

For each requirement that you wish to review, you will be invited to provide:

1. Feedback on the suggested **Need** level for the requirement, according to the following options:

   ○ **No Change - Keep As-Is** - you agree with the suggested level of need presented in the braces, e.g. {Important}

   ○ **Change to Critical** - we must have this capability in a system, or it is a compliance prerequisite

   ○ **Change to Important** – this is a high value capability that we could live without but which it would be difficult to do without

   ○ **Change to Desired** – capability that is nice-to-have or an extra / new feature above and beyond expectations

   ○ **Change to No Need** – you do not know of a current or possible use case for this capability

   ○ **Unsure/Unknown** - you do not have an opinion regarding the level of **Need**, or are unsure or unaware of the need

2. Any comments you may have regarding the requirement:

   ○ If present, click "**view in full**" next to the text of the requirement you are reviewing.

   ○ Review the requirement and the provided context. Is the context as currently described accurate and complete?

   ○ If not, close the pop-up window and share any feedback you may have on this item in the **Comments** box
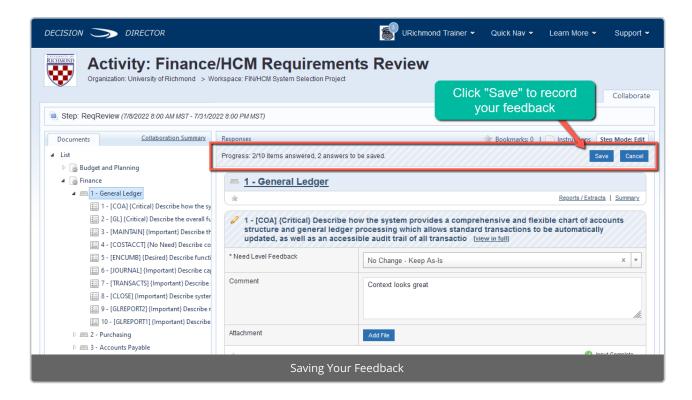
below the requirement.

- If your comments regarding the context are extensive, you may wish to copy the context into a Word document, provide your comments or edits (track changes would be appreciated), and then use the **Add File** button to attach your document.

- This comment area may also be used to explain, for example, why you selected a different level of **Need**.

Requirements Review

Saving Your Work

You will be prompted to Save your work.

Saving Your Feedback

Review Only Requirements That Pertain to You

You are not expected to review all requirements - but you certainly are free to look around. For your review, though, please focus on areas of your specific work, interest, or expertise.
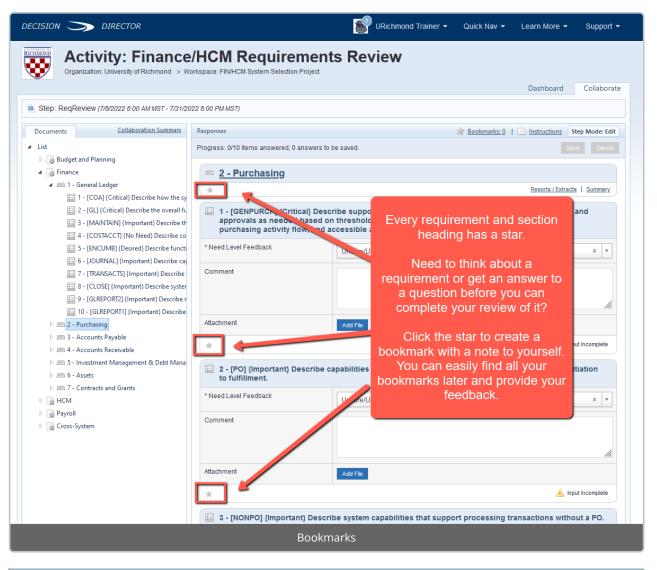
You do not have to complete all of your ratings in one sitting, You may come back at anytime to continue or alter your ratings.
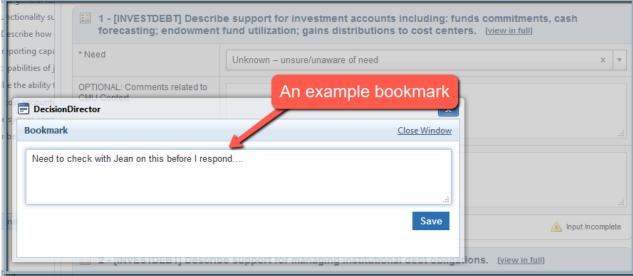
Suggesting Additional Requirements

Once you have completed your review, if there is a requirement you believe should be added you may suggest it by emailing the proposed requirement to richmond@morantechnology.com, along with its level of Need, relevant CMU Context, and any Ratings Scale Items or additional comments you would like to provide for it.

Helpful Features

DecisionDirector provides some helpful features to make your review process fast, easy, and productive.

Bookmarks

An example bookmark

Questions?

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

Kris Nordlie and Craig Foley with Moran Technology Consulting at:

richmond@morantechnology.com

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