

UR Finance/HCM Requirements Review

Last Modified on 07/19/2022 2:19 pm MST

UR Finance/HCM Requirements Review Instructions

Table of Contents

- [Welcome](#)
- [Video Overview](#)
- [Accessing DecisionDirector](#)
- [Selecting a Document](#)
- [Entering Your Reviews](#)
- [Saving Your Work](#)
- [Review Only Requirements That Pertain to You](#)
- [Suggesting Additional Requirements](#)
- [Helpful Features](#)

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 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.

DECISION DIRECTOR

URichmond Trainer

Dashboard Messages Access Account Settings

Organizations +

Workspaces +

Activities -

Finance/HCM Requirements Review
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project
Collect requirements reviews from project stakeholders

Collaborate

Click "Collaborate" to Begin

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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.

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URichmond Trainer

Quick Nav Learn More Support

Activity: Finance/HCM Requirements Review
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Dashboard Collaborate

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents Collaboration Summary

List

- Budget and Planning
- Finance
- HCM
- Payroll
- Cross-System

Document

	★	My Contribution	
		% Complete	Complete/Total
Budget and Planning		0%	0 / 5
Finance		0%	0 / 36
HCM		0%	0 / 29
Payroll		0%	0 / 6
Cross-System		0%	0 / 3
Total		0%	0 / 79

Reports / Extracts

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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.

DECISION DIRECTOR

URichmond Trainer Quick Nav Learn More Support

Activity: Finance/HCM Requirements Review

Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents Collaboration Summary

List

- Budget and Planning
- Finance
- HCM
- Payroll
- Cross-System

Click a document to access requirements

Document	My Contribution
	% Complete Complete/Total
Budget and Planning	- 0% 0 / 5
Finance	- 0% 0 / 36
HCM	- 0% 0 / 29
Payroll	- 0% 0 / 6
Cross-System	- 0% 0 / 3
Total	- 0% 0 / 79

Reports / Extracts

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Click a Document to Access Requirements

DECISION DIRECTOR

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Activity: Finance/HCM Requirements Review

Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents Collaboration Summary Responses

List

- Budget and Planning
- Finance
- HCM
- Payroll
- Cross-System

The Finance document has been selected

Finance

- 1 - General Ledger
- 2 - Purchasing
- 3 - Accounts Payable
- 4 - Accounts Receivable
- 5 - Investment Management & Debt Management
- 6 - Assets
- 7 - Contracts and Grants

Click "Summary" to see the table of contents and your progress-to-date

Summary

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Select the Document and Click Summary

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DIRECTOR
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Quick Nav
Learn More
Support

Activity: Finance/HCM Requirements Review
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents
Collaboration Summary
Responses

List

- Budget and Planning
- Finance**
 - 1 - General Ledger
 - 2 - Purchasing
 - 3 - Accounts Payable
 - 4 - Accounts Receivable
 - 5 - Investment Management & Debt Management
 - 6 - Assets
 - 7 - Contracts and Grants
- HCM
- Payroll
- Cross-System

Finance

Document / Section	My Contribution
	% Complete Complete/Total
Total for: Finance	0% 0 / 36
Finance	- -
General Ledger	0% 0 / 10
Purchasing	0% 0 / 10
Accounts Payable	0% 0 / 5
Accounts Receivable	0% 0 / 3
Investment Management & Debt Management	0% 0 / 2
Assets	0% 0 / 1
Contracts and Grants	0% 0 / 5

This area provides summary counts of requirements and the number of requirements you have reviewed

Select a section of requirements to review

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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:

- 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
- 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**.

The screenshot displays the 'Activity: Finance/HCM Requirements Review' interface. The top navigation bar includes 'DECISION DIRECTOR', 'URichmond Trainer', 'Quick Nav', 'Learn More', and 'Support'. The main header shows the organization as 'University of Richmond' and the workspace as 'FIN/HCM System Selection Project'. The current step is 'ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)'. The left sidebar lists various system components under 'Documents', including 'Budget and Planning', 'Finance', 'HCM', 'Payroll', and 'Cross-System'. The main content area shows a list of requirements. Requirement 1, '[COA] (Critical) Describe how the system provides a comprehensive and flexible chart of accounts structure and general ledger processing which allows standard transactions to be automatically updated, as well as an accessible audit trail of all transactions', is highlighted. A red box labeled 'Requirement' points to this requirement. A red box labeled 'Suggested Need Level' points to the 'Need Level Feedback' dropdown menu, which is currently set to 'No Change - Keep As-Is'. A red box labeled 'Options for Need Level Feedback' points to the dropdown menu options: 'No Change - Keep As-Is', 'Change to Critical', 'Change to Important', 'Change to Desired', 'Change to No Need', and 'Unsure/Unknown'. A red box labeled 'Click [view in full] to view the context for this requirement' points to the '[view in full]' link next to the requirement description. The interface also includes a 'Responses' section with a progress bar showing '1/10 items answered, 1 answers to be saved'. The bottom of the screen shows the 'Requirements Review' title.

Saving Your Work

You will be prompted to Save your work.

Activity: Finance/HCM Requirements Review
 Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents | Collaboration Summary | Responses

Progress: 2/10 items answered, 2 answers to be saved. [Save] [Cancel]

1 - General Ledger

1 - [COA] [Critical] Describe how the system provides a comprehensive and flexible chart of accounts structure and general ledger processing which allows standard transactions to be automatically updated, as well as an accessible audit trail of all transactions. [view in full]

* Need Level Feedback: No Change - Keep As-Is

Comment: Context looks great

Attachment: [Add File]

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@moranttechnology.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.

DECISION DIRECTOR URichmond Trainer Quick Nav Learn More Support

Activity: Finance/HCM Requirements Review

Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Step: ReqReview (7/8/2022 8:00 AM MST - 7/31/2022 8:00 PM MST)

Documents Collaboration Summary Responses Bookmarks: 0 Instructions Step Mode: Edit

Progress: 0/10 items answered, 0 answers to be saved. Save Cancel

2 - Purchasing Reports/Extracts Summary

1 - [GENPURCH] (Critical) Describe support approvals as needed based on threshold purchasing activity flow, and accessible

* Need Level Feedback Unknown/Unsure

Comment

Attachment Add File

2 - [PO] (Important) Describe capabilities to fulfillment.

* Need Level Feedback Unknown/Unsure

Comment

Attachment Add File

3 - [NONPO] (Important) Describe system capabilities that support processing transactions without a PO.

Input Incomplete

Bookmarks

Every requirement and section heading has a star.

Need to think about a requirement or get an answer to a question before you can complete your review of it?

Click the star to create a bookmark with a note to yourself. You can easily find all your bookmarks later and provide your feedback.

DecisionDirector

Bookmark Close Window

Need to check with Jean on this before I respond....

Save

1 - [INVESTDEBT] Describe support for investment accounts including: funds commitments, cash forecasting; endowment fund utilization; gains distributions to cost centers. [view in full]

* Need Unknown – unsure/unaware of need

OPTIONAL: Comments related to CMU Context

2 - [INVESTDEBT] Describe support for managing institutional debt obligations. [view in full]

Input Incomplete

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.
