UR Requirements Review - Accept Invitation

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UR Finance/HCM Requirements Review - Accept Invitation

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Please Note

While this page was initially written for the first DecisionDirector activity at UR, the steps for accepting an invitation to participate in ANY activity (requirements review, bid evaluation, demo evaluation, et cetera) are the same.

Welcome

Thank you for agreeing to participate in the requirements review activity in DecisionDirector. This page explains how to accept the invitation to contribute to this important step.

Fast Track to Invitation without the Invitation Email

- 1. Go to https://advantiv.decisiondirector.com/
- 2. NOTE: You do not need to create a DecisionDirector account it has already been created for you.
- 3. Login with your email address and your initial password, which is "URichERP22#" (without the quotes).
- 4. Click your name in the top, dark blue header (shown below).
- 5. Click Concierge from the pull-down menu (shown below).
- 6. Click the Invitation to Contribute presented in the Concierge.

| decision 🏷 director | URichmond Trainer03 - | Quick Nav 👻 Learn More 👻 Support 🛩 |
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| URichmond Trainer03 | My Dashboard Concierge Messages Account Settings | Messages Access Account Settings |
| Organizations Click Your Name Workspaces | Logout + | + |
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| Getting started | | | | Messages |
|---|---|---------------------------|--|-------------------------|
| DD Overview | ^ | You have 1 unread message | s, 1 require action. | View all messages |
| A quick review of DecisionDirector's purpose | | Created On | Title [click to navigate to the message] | |
| DD Subscriptions - NEW How DD subscribers use DD after their first project DD for Vendors Helpful information and step- by-steps for RFP respondents. | | ⑦ 7/13/2022 12:50 PM Clic | k this Invitation to Contribute | request for Finance/HCM |
| - | ~ | | | |

Continue on to the **Accepting the Invitation** section further below.

Invitation by Email

You will receive an email from notify@decisiondirector.com with the subject line: "DecisionDirector - INVITATION to Contribute -> Contributor request for Finance/HCM Requirements Review". The body of the email is shown below.

- 1. Click the link that is provided in the email. The link will take you to the login page for DecisionDirector.
- 2. NOTE: You do not need to create a DecisionDirector account it has already been created for you.
- 3. Login with your email address and the password "URichERP22#" (without the quotes).

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When you've logged in, you will be taken to the Invitation message. Follow the steps below to accept the invitation.

DecisionDirector Login Page

DecisionDirector® - A Collaborative Planning and Complex Procurement Support System

Accepting the Invitation

1. Click Accept...



2. Click Accept on the pop-up that will appear

| | URichmond ERP Your DecisionDirector account has already been created for you | |
|---|---|--|
| DecisionDirector - Invitation Change Sta | atus It. You | |
| Invitation - Accept | Cancel / Close Window | |
| Thank you for accepting this invitation to Finance/HCM Requirements Revie | to assist with Finance/HCM Requirements Review. Upon your acceptance, access www.ill appear on your dashboard. | |
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| Click the Next Accept | | |

3. Click the **Dashboard** tab

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| 7/13/2022 12:50 PM INVITATION to Contribute -> Contributor request for Finance/HCM Requirements Review | INVITATION to Contribute -> Contributor request for Finance/HCM Requirements Review Regarding: Finance/HCM Requirements Review Created On: 7/13/2022 12:50 PM MST Message Type: Invitation You have been invited to participate as a contributor in the Finance/HCM Requirements Review activity. If you are able to participate, please Accept this invitation, and the activity will appear on your dashboard. Otherwise, you may Decline this invitation. Additional Message Text URichtmond ERP Your DecisionDirector account has already been created for you. Your username is your Campbelle mail address, the same address to which this invitation was sent. Your initial password is URichERP22#; You may change it after you log in. For more information, visit: https://help.decisiondirector.com/help/ur-fin-hcm-requirements-review Invitation expires on: 7/19/2022 8:00:00 PM Invitation (Current Status = Accepted): Accept Decline | | | |
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| Click Dashboard | | | | |

4. Click **Collaborate** to review the requirements (for further instructions, see UR Finance/HCM Requirements Review.

| DECISION S DIRECTOR | URichmond Trainer 👻 Quick Nav 👻 Learn More 👻 Support 👻 | | |
|--|--|--|--|
| URichmond Trainer | Dashboard Messages Access Account Settings | | |
| Organizations | + Click "Collaborate" to Begin | | |
| Workspaces Activities | + - | | |
| Finance/HCM Requirements Review Organization: University of Richmond > Workspace: FINHCM System Selection Project Collect requirements reviews from project stakeholders | Collaborate | | |
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| Click Collaborate to Review the Requirements | | | |

Requirements Validation Instructions

See UR Finance/HCM Requirements Review for complete instructions.

OPTIONAL: Setting a New Password

Although not required, you may wish to set a new password for your DecisionDirector account.

To set a different password:

- 1. Click the dropdown menu by your name and select " Account Settings"
- 2. Navigate to "Credentials / Change Password" on the left hand menu
- 3. Click "Change Password"
- 4. Enter your new password and click "Save". This will set a permanent password for your account.

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.