UR Finance/HCM RFP - Bid Evaluations - Software

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Welcome

Thank you for agreeing to participate in the evaluation of the software bids.

Evaluators: These instructions also apply to the <u>SI Bid Evaluation</u> and the <u>Software Demo Evaluation</u> activities.

The content is different but the steps are generally the same.

Video Overview

The following video covers:

- receiving the emailed invitation from DecisionDirector
- logging in to DecisionDirector
- accessing the software bids
- navigating through the bid evaluation forms, and
- providing and saving review input

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.

Bid Evaluation in DecisionDirector (8:12)

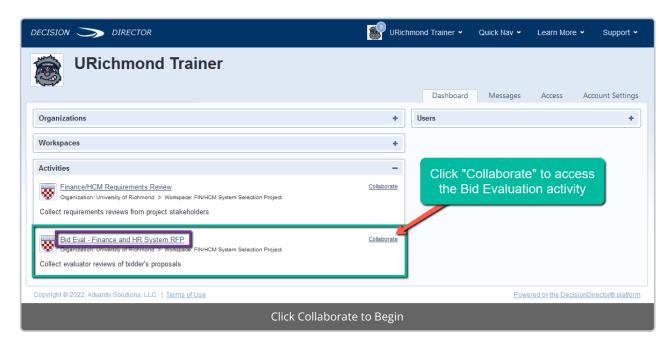
Accessing DecisionDirector

For access instructions, see:

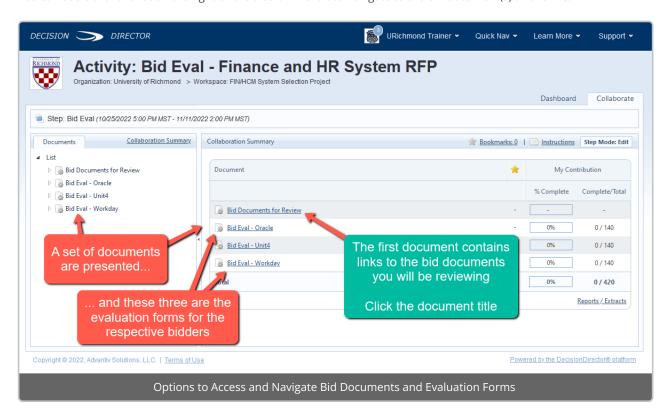
UR - Accept DecisionDirector Invitation

Reviewing Bids in DecisionDirector

Once you've logged in, you will find the Bid Evaluation activity on your dashboard. Click the "Collaborate" link to reveal the list of associated bid documents and evaluation forms.

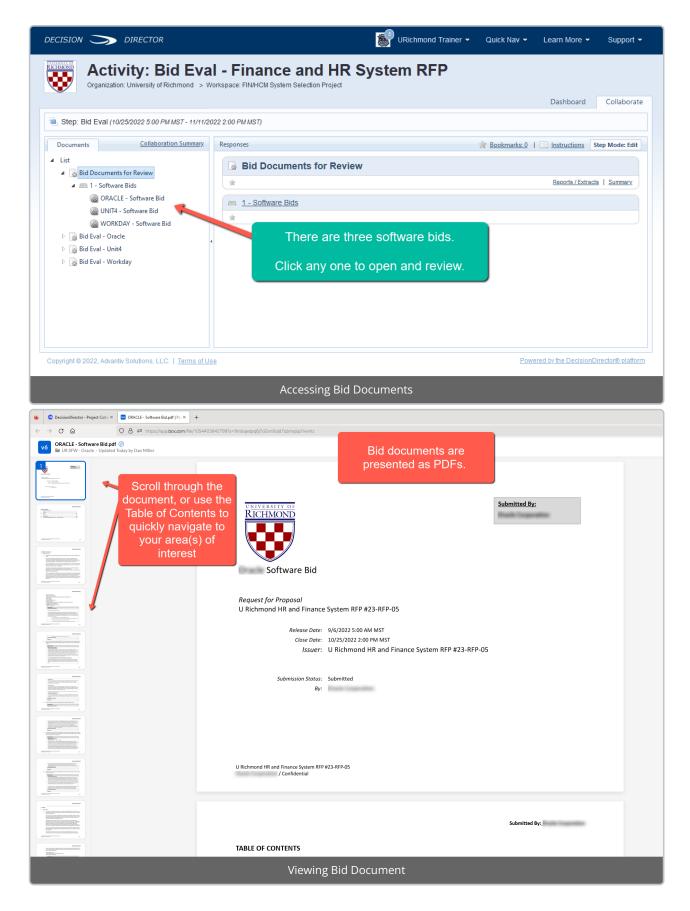


You can use either the list on the right or the tree on the left to navigate to the bid document(s) and forms.



Selecting a Bid Document

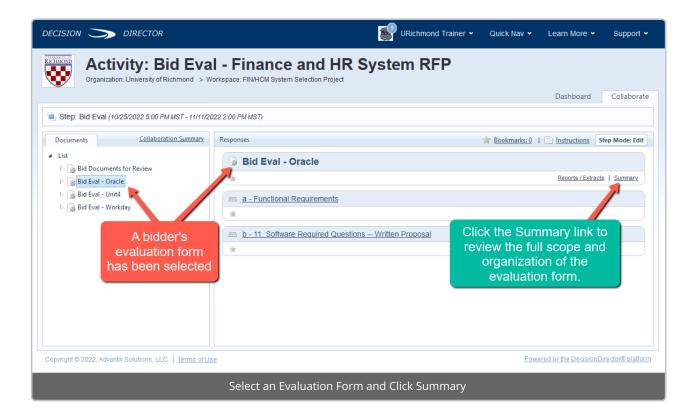
Click on a document title to bring that document into focus. Click the Summary link to see even more, including your progress to-date.

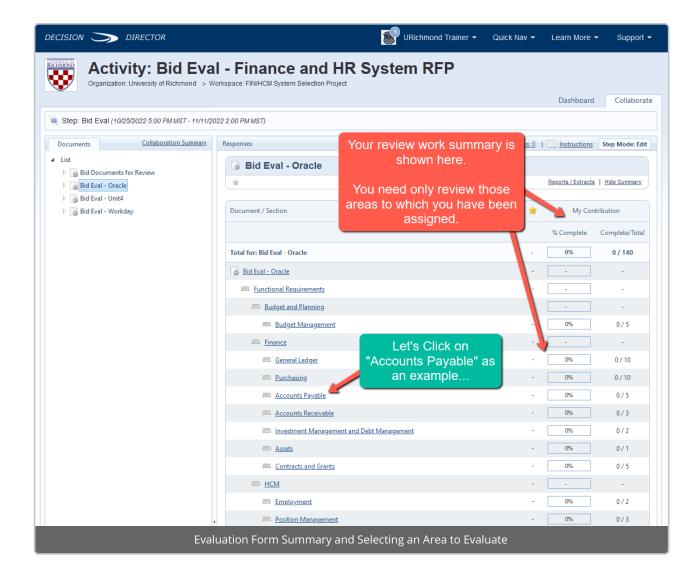


Selecting an Evaluation Form

An evaluation form has been created for each bidder. The forms are identical.

As you review a bidder's bid document, you can open the corresponding evaluation form and record your ratings. The form is presented in the same order as the sections and items found in the bid document.





Entering Your Evaluations

As you read a Bidder's response, rate the response in DecisionDirector.

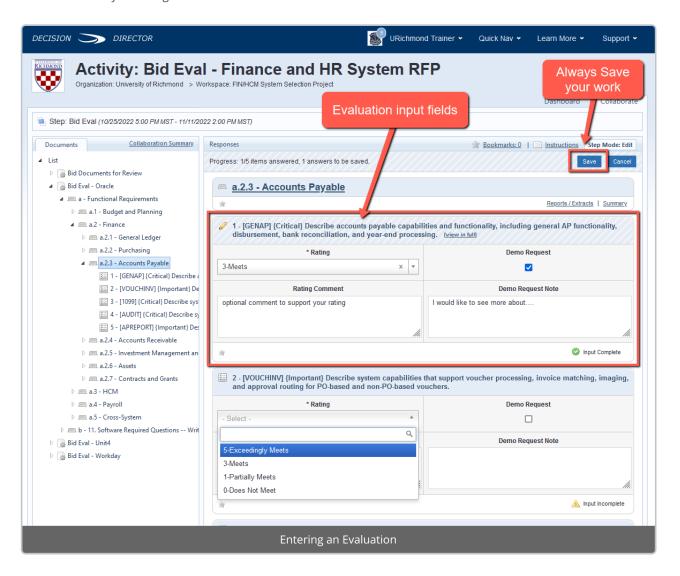
You can use the tree on the left to open any evaluation form and navigate to your assigned areas (sections). Each section contains one or more requirements or questions that the bidder answered, and each has its own evaluation input fields.

Select any section to access the list of items within.

For each item:

- Select the rating you feel is appropriate from the "Rating" drop down box:
 - The bidder response **EXCEEDINGLY MEETS** our needs
 - The bidder response **MEETS** our needs
 - The bidder response **PARTIALLY MEETS** our needs
 - The bidder response **DOES NOT MEET** our needs
- You may provide a brief statement in the "Rating Comment" field to explain your rating.
- If you desire additional information from the bidder for the item, check the "**Demo Request**" box and explain what you would like to see in the "**Demo Request Note**" field.
- You will need to **Save** your rating.

- It is a good practice to click the "Save" button in the upper right-hand corner for each rating you enter.
- If you forget click the "Save" button and attempt to navigate away, the system will prompt you to save your
 work.
- You do not have to complete all ratings in one sitting; you may return at any time until closure to continue or alter your ratings.



Questions?

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

Kris Nordlie and Craig Foley with Moran Technology Consulting at:

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