UR Finance/HCM RFP - Bid Evaluations - Systems Integrators

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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.**

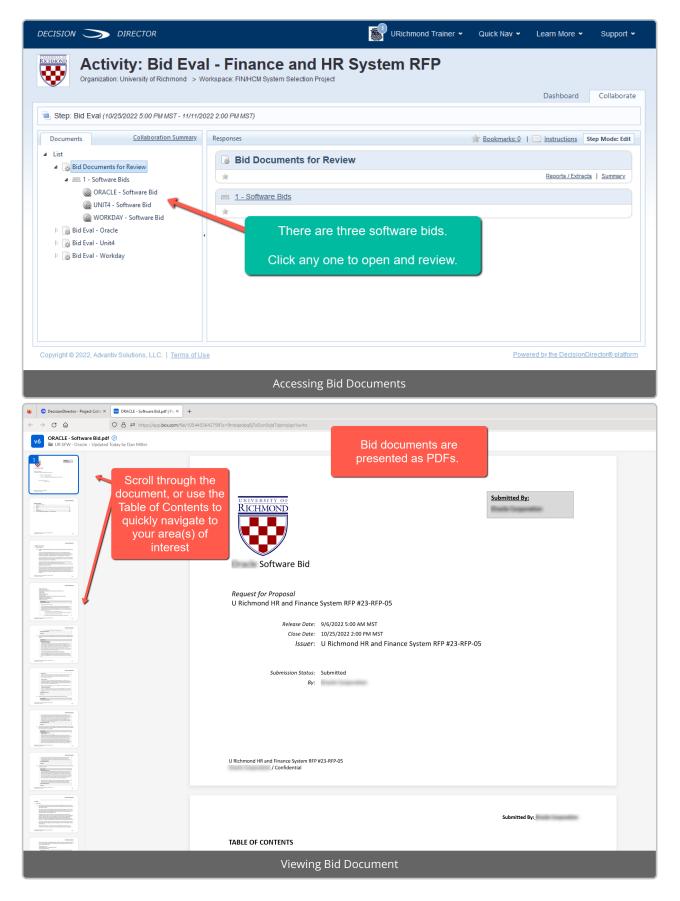
DECISION Solution	😻 URichmond Trainer 👻 Quick Nav 👻 Learn More 👻 Support 👻				
URichmond Trainer	Dashboard Messages Access Account Settings				
Organizations	+ Users +				
Workspaces	+				
Activities	- Click "Collaborate" to access				
Finance/HCM Requirements Review Organization: University of Richmond > Workspace: FINHCM System Selection Project	Collaborate the Bid Evaluation activity				
Collect requirements reviews from project stakeholders					
Bid Eval - Finance and HR System RFP	Collaborate				
Collect evaluator reviews of bidder's proposals					
Copyright © 2022, Advantiv Solutions, LLC. <u>Terms of Use</u>	Powered by the DecisionDirector® platform				
Click Collaborate to Begin					

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

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Organization: University of Richmond > W		-		Dashboard	Collaborate
Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/2 Documents Collaboration Summary	022 2:00 PM MST) Collaboration Summary	🚔 Bookn	narks: 0	I instructions	Step Mode: Edit
 ▲ List ▶ → → Bid Documents for Review ▶ → → Bid Eval - Oracle 	Document		*	My Con	tribution
⊳ 📓 Bid Eval - Unit4 ▷ 📓 Bid Eval - Workday	Bid Documents for Review		-	% Complete	Complete/Total
A set of documents are presented		The first document contain	ns I	0%	0 / 140
	Bid Eval - Workday	links to the bid document you will be reviewing	S	0%	0 / 140 0 / 420
and these three are the evaluation forms for the		Click the document title			Reports / Extracts
respective bidde					
Copyright © 2022, Advantiv Solutions, LLC. <u>Terms of U</u>	58		Pow	ered by the Decisio	onDirector® platform
Options	to Access and Navigate	e Bid Documents and Evaluation For	ms		

Selecting a Bid Document

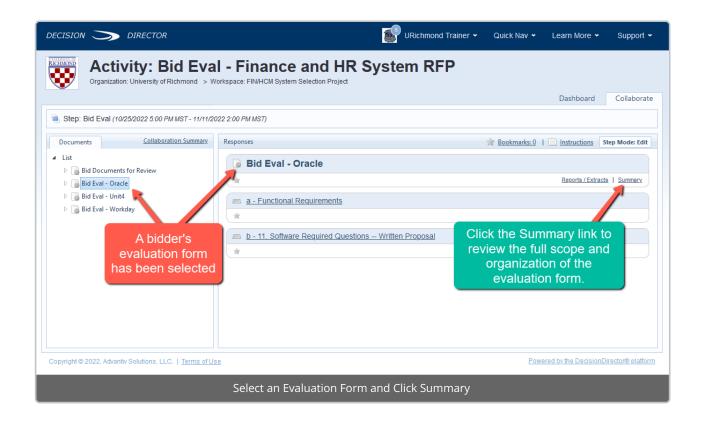
Click on a document title to bring that document into focus. Click the Summary link to see even more, including your progress to-date.



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.



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Organization: University of Richmond > V	AI - Finance and Workspace: FINHCM System Selection Pro	-	Dashboard Collaborate
Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/2	2022 2:00 PM MST)		
Documents Collaboration Summary	Responses	Your review work summary is s.0 1 Instructions Step Mode:	
 List ▷ Bid Documents for Review 	Bid Eval - Oracle	shown here.	
D 🐻 Bid Eval - Oracle	*	You need only review th	OSE
 Bid Eval - Unit4 Bid Eval - Workday 	Document / Section	areas to which you have been assigned.	
			% Complete Complete/Total
	Total for: Bid Eval - Oracle		- 0% 0 / 140
	Bid Eval - Oracle		·
	Eunctional Requirements		· · ·
	Budget and Planning		· · ·
	Budget Management		- 0% 0/5
	Finance	Let's Click on	· · · ·
	🥮 General Ledger	"Accounts Payable" a	S - 0% 0/10
	Purchasing	an example	- 0% 0/10
	Accounts Payable		- 0% 0 / 5
	Accounts Receivable		- 0% 0 / 3
	Investment Managen	nent and Debt Management	- 0% 0 / 2
	Assets		- 0% 0 / 1
	Contracts and Grants		- 0% 0 / 5
	E HCM		
	Employment		- 0% 0 / 2
	Position Managemen	<u>t</u>	- 0% 0 / 3

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.

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Activity: Bid Eval - Finance and HR System RFP Organization: University of Richmond > Workspace: FINHCM System Selection Project Evaluation input fields								
Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/20 Documents <u>Collaboration Summary</u>	Responses	Bookmarks: 0 Instructions Step Mode: Edit						
 List Bid Documents for Review Bid Eval - Oracle a - Functional Requirements 	Progress: 1/5 items answered, 1 answers to be saved.	Reports / Extracts Summary						
 a.1 - Budget and Planning a.2 - Finance a.2.1 - General Ledger a.2.2 - Purchasing a.2.3 - Accounts Payable 	1 - [GENAP] {Critical} Describe accounts payable capabilities and functionality, including general AP functionality, disbursement, bank reconciliation, and year-end processing. <u>triew in full</u> * Rating Demo Request 3-Meets X							
1 - [GENAP] {Critical} Describe a 2 - [VOUCHINV] {Important} De 3 - [1099] {Critical} Describe sys 4 - [AUDIT] {Critical} Describe sy 5 - [APREPORT] {Important} Des	Rating Comment optional comment to support your rating	Demo Request Note						
a.2.4 - Accounts Receivable a.2.5 - Investment Management an a.2.6 - Assets a.2.7 - Contracts and Grants		Input Complete that support voucher processing, invoice matching, imaging,						
 ▶ a.3 - HCM ▶ a.4 - Payroll ▶ a.5 - Cross-System ▶ b - 11. Software Required Questions Writ ▶ Bid Eval - Unit4 ▶ Bid Eval - Workday 	and approval routing for PO-based and non-PO-based vo * Rating - Select Select S-Exceedingly Meets 3-Meets 1-Partially Meets 0-Does Not Meet *	Demo Request Demo Request Note						
Entering an Evaluation								

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.