

# UR Finance/HCM RFP - Software Demo Evaluations

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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 [SI Bid Evaluation](#) and the [Software Demo Evaluation](#) 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 DIRECTOR

URichmond Trainer

Dashboard Messages Access Account Settings

Organizations +

Workspaces +

Activities -

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

**Bid Eval - Finance and HR System RFP Collaborate**  
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project  
Collect evaluator reviews of bidder's proposals

Click "Collaborate" to access the Bid Evaluation activity

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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 bid document(s) and forms.

DECISION DIRECTOR

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Quick Nav Learn More Support

Activity: Bid Eval - Finance and HR System RFP  
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Dashboard Collaborate

Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/2022 2:00 PM MST)

Documents Collaboration Summary

List

- Bid Documents for Review
- Bid Eval - Oracle
- Bid Eval - Unit4
- Bid Eval - Workday

A set of documents are presented...

... and these three are the evaluation forms for the respective bidders

Collaboration Summary

Document	My Contribution
	% Complete Complete/Total
Bid Documents for Review	- -
Bid Eval - Oracle	0% 0 / 140
Bid Eval - Unit4	0% 0 / 140
Bid Eval - Workday	0% 0 / 140
Total	0% 0 / 420

The first document contains links to the bid documents you will be reviewing

Click the document title

Reports / Extracts

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Options to Access and Navigate Bid Documents and Evaluation 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.



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.

**Activity: Bid Eval - Finance and HR System RFP**  
Organization: University of Richmond > Workspace: FIN/HCM System Selection Project

Dashboard Collaborate

Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/2022 2:00 PM MST)

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

**List**

- Bid Documents for Review
- Bid Eval - Oracle**
- Bid Eval - Unit4
- Bid Eval - Workday

**Bid Eval - Oracle** Reports / Extracts Summary

a - Functional Requirements

p - 11. Software Required Questions -- Written Proposal

A bidder's evaluation form has been selected

Click the Summary link to review the full scope and organization of the evaluation form.

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Select an Evaluation Form and Click Summary



- 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.

**Activity: Bid Eval - Finance and HR System RFP**  
Organization: University of Richmond > Workspace: FINHCM System Selection Project

Step: Bid Eval (10/25/2022 5:00 PM MST - 11/11/2022 2:00 PM MST)

Documents: Collaboration Summary

List

- Bid Documents for Review
- Bid Eval - Oracle
  - a - Functional Requirements
    - 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. [\[view in full\]](#)
        - 2 - [VOUCHINV] (Important) Describe system capabilities that support voucher processing, invoice matching, imaging, and approval routing for PO-based and non-PO-based vouchers.
        - 3 - [1099] (Critical) Describe system capabilities that support 1099 processing, including general 1099 functionality, disbursement, and year-end processing.
        - 4 - [AUDIT] (Critical) Describe system capabilities that support audit processing, including general audit functionality, disbursement, and year-end processing.
        - 5 - [APREPORT] (Important) Describe system capabilities that support AP report processing, including general AP report functionality, disbursement, and year-end processing.
      - a.2.4 - Accounts Receivable
      - a.2.5 - Investment Management and Analysis
      - a.2.6 - Assets
      - a.2.7 - Contracts and Grants
      - a.3 - HCM
        - a.4 - Payroll
        - a.5 - Cross-System
      - b - 11. Software Required Questions -- Write your own questions
    - Bid Eval - Unit4
    - Bid Eval - Workday

Responses

Progress: 1/5 items answered, 1 answers to be saved.

**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. [\[view in full\]](#)

\* Rating: 3-Meets

Demo Request: ☒

Rating Comment: optional comment to support your rating

Demo Request Note: I would like to see more about....

Input Complete

2 - [VOUCHINV] (Important) Describe system capabilities that support voucher processing, invoice matching, imaging, and approval routing for PO-based and non-PO-based vouchers.

\* Rating: - Select -

Demo Request: ☐

Demo Request Note:

Input Incomplete

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](mailto:richmond@morantechnology.com)

For questions about DecisionDirector, please contact [support@advantiv.com](mailto:support@advantiv.com).