

# **IDII RFI Scorecard**

## **Sample Views**

## **Basic Instructions**

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**Image 1 - WMS Scorecard – Presentation View – With HIDDEN Columns**

One view shown. Other views are # of customers & installations, modules offered, support questions.

<b>OVERALL PROJECT SCOPE</b>											
	<b>Use Wt</b>	<b>Vendor1</b>	<b>Score</b>	<b>Name2</b>	<b>Score</b>	<b>Name3</b>	<b>Score</b>	<b>Vendor4</b>	<b>Score</b>	<b>Vendor5</b>	<b>Score</b>
<b>OUTBOUND ORDERS</b>											
Ship Complete	5	NX	0	YF	10	YF	10	YF	10	YF	10
Line Complete	5	NX	0	NX	0	YF	10	YF	10	YF	10
Cross Dock on Last Item in Order	5	NX	0	NX	0	YF	10	YF	10	YF	10
<b>WAVE PLANNING &amp; RELEASE</b>											
Automatic Release to Picking	10	NX	0	YF	20	YF	20	YF	20	YF	20
Automatic Grouping & Release	10	NX	0	NP	0	YF	20	YF	20	YF	20
Wave Maximum Total Weight	5	NX	0	NX	0	N5	0	YF	10	YI	5
Wave Maximum Total Volume	1	NX	0	NX	0	N5	0	YF	2	YI	1
Wave Maximum Total Lines	5	NX	0	NX	0	NP	0	YF	10	YF	10
Wave Maximum Total Quantity	1	NX	0	NX	0	NP	0	YF	2	YI	1
Wave by Warehouse	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Priority Code	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Priority Code Range	5	NX	0	NX	0	YF	10	N3	0	NP	0
Wave by Order Type	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Order Type List	10	NX	0	YF	20	YF	20	YF	20	NX	0
Wave by Order Number	5	NX	0	YF	10	YF	10	YF	10	YF	10
Wave by Order Number Range	5	NX	0	NX	0	YF	10	YF	10	NX	0
Wave by Order Number List	5	NX	0	YF	10	YF	10	YF	10	NX	0
Wave by Order's Line Item	5	NX	0	NX	0	YF	10	YF	10	YF	10
Wave by Ship Date	10	NX	0	NX	0	YF	20	YF	20	YF	20
Wave by Ship Date Range	10	NX	0	NX	0	YF	20	YF	20	YF	20
Wave by Customer	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Customer List	10	NX	0	YF	20	YF	20	YF	20	NX	0
Wave by Customer & Shipto	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Country	1	NX	0	YF	2	YF	2	YF	2	NX	0
Wave by State/Province	1	NX	0	YF	2	YF	2	YF	2	NX	0
Wave by Route #	1	NX	0	YF	2	YF	2	YF	2	NX	0
Wave by Route # and Drop #	1	NX	0	YF	2	YF	2	YF	2	YF	2
Wave by Carrier	10	NX	0	YF	20	YF	20	YF	20	NX	0
Wave by Carrier & Shipto & Max	5	NX	0	NX	0	YF	10	YF	10	YF	10
Wave by Carrier & Trans. Mode	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Carrier & Customer #	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Carrier & Route #	1	NX	0	YF	2	YF	2	YF	2	NX	0
Wave by Carrier, Drop, Max Wt	1	NX	0	NX	0	YF	2	YF	2	NX	0
Wave by Carrier & Shipto	10	NX	0	YF	20	YF	20	YF	20	YF	20
Wave by Pickup Appointment	5	NX	0	NX	0	YF	10	YF	10	YF	10

**Image 2 - WMS Scorecard – All Columns Shown – Work Mode**

One may have two weights – initial scope weight and overall project weight. This image shows the Overall Project Scope values. By changing just one cell value, we can have Excel re-compute to show the Initial Scope values. Most clients need just one scorecard – the overall project weight.

OVERALL PROJECT SCOPE															
	Use Wt	Overall Wt	Initial Wt	Vendor1	Equals	Score	Name2	Equals	Score	Name3	Equals	Score	Vendor4	Equals	Score
<b>WAVE PLANNING &amp; RELEASE</b>				-----			-----			-----			-----		
Automatic Release to Picking	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Automatic Grouping & Release	10	10	1	NX	0	0	NP	0	0	YF	2	20	YF	2	20
Wave Maximum Total Weight	5	5	1	NX	0	0	NX	0	0	N5	0	0	YF	2	10
Wave Maximum Total Volume	1	1	1	NX	0	0	NX	0	0	N5	0	0	YF	2	2
Wave Maximum Total Lines	5	5	1	NX	0	0	NX	0	0	NP	0	0	YF	2	10
Wave Maximum Total Quantity	1	1	1	NX	0	0	NX	0	0	NP	0	0	YF	2	2
Wave by Warehouse	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Priority Code	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Priority Code Range	5	5	1	NX	0	0	NX	0	0	YF	2	10	N3	0	0
Wave by Order Type	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Order Type List	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Order Number	5	5	1	NX	0	0	YF	2	10	YF	2	10	YF	2	10
Wave by Order Number Range	5	5	1	NX	0	0	NX	0	0	YF	2	10	YF	2	10
Wave by Order Number List	5	5	1	NX	0	0	YF	2	10	YF	2	10	YF	2	10
Wave by Order's Line Item	5	5	1	NX	0	0	NX	0	0	YF	2	10	YF	2	10
Wave by Ship Date	10	10	1	NX	0	0	NX	0	0	YF	2	20	YF	2	20
Wave by Ship Date Range	10	10	1	NX	0	0	NX	0	0	YF	2	20	YF	2	20
Wave by Customer	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Customer List	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Customer & Shipto	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Country	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Wave by State/Province	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Wave by Route #	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Wave by Route # and Drop #	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Wave by Carrier	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Carrier & Shipto & Max	5	5	1	NX	0	0	NX	0	0	YF	2	10	YF	2	10
Wave by Carrier & Trans. Mode	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Carrier & Customer #	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Carrier & Route #	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Wave by Carrier, Drop, Max Wt	1	1	1	NX	0	0	NX	0	0	YF	2	2	YF	2	2
Wave by Carrier & Shipto	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Wave by Pickup Appointment	5	5	1	NX	0	0	NX	0	0	YF	2	10	YF	2	10

**Image 3 – Totals on WMS Scorecard – All Columns Shown – Work Mode**

When building the scorecard, just drop in the vendor’s response into the vendor 1, vendor 2... column. The **Equals** column is a formula that takes the vendor’s response and equates it to a zero or one. The **Score** column is the result of the **Use Wt** value times the **Equals**. (Our Use Wt is the Overall Wt.)

OVERALL PROJECT SCOPE															
	Use Wt	Overall Wt	Initial Wt	Vendor1	Equals	Score	Name2	Equals	Score	Name3	Equals	Score	Vendor4	Equals	Score
<b>Production Requirements</b>															
Line assignment to SKU	0	0	1	NX	0	0	YI	1	0	YF	2	0	YF	2	0
Line changeover SKU to SKU	0	0	1	NX	0	0	YI	1	0	YF	2	0	YF	2	0
Putaway from Line	1	1	1	YF	2	2	YF	2	2	YF	2	2	YF	2	2
Manual requests for materials	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Automatic replenishment of materials	0	0	1	NX	0	0	NX	0	0	YF	2	0	N10	0	0
Manual requests for material returns	10	10	1	NX	0	0	YF	2	20	YF	2	20	YF	2	20
Put away from line to outbound order	1	1	1	NX	0	0	NX	0	0	YF	2	2	YF	2	2
Automatic tasks for dunnage removal	0	0	1	NX	0	0	NX	0	0	YF	2	0	N10	0	0
<b>Business Partners or Turnkey Solutions</b>															
Partner with RF Vendors	5	5	1	NX	0	0	YF	2	10	YF	2	10	YF	2	10
Partner with Label printing vendors	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Partner with label applicator vendor	1	1	1	NX	0	0	YF	2	2	YF	2	2	YF	2	2
Turnkey service	5	5	1	NX	0	0	YF	2	10	YF	2	10	YF	2	10
<b>MORE QUESTIONS</b>															
					Just Two			Just Two			Just Two			Just Two	
Next Major Release Date	0			5/1/02			6/1/02			12/01/02			10/31/01		
Next Major Release Version	0			1.5			2.0			7.0			v 5.4		
<b>SIMPLE TOTAL SCORE</b>															
<b>OVERALL PROJECT SCOPE</b>				<b>1461</b>			<b>3490</b>			<b>5386</b>			<b>5345</b>		
----- NOTE -----															
If A878 Has "Initial Scope Items"															
Then Scores Reflect INITIAL SCOPE															
Else Scores Reflect OVERALL SCOPE															
<b>Total Possible Score</b>															
<b>6344</b>															

**Image 4 – Weighted Scorecard Analysis – Presentation Mode**

One may indicate a category/module weight value (0 to 10). One may reduce vendor scoring by setting selected modules to a zero weight. Using a weight value of 10 increases important categories.

Conclusion: Vendor 3 and 4 are the stronger solutions with 84 & 85%.

<b>Weighted Scorecard Analysis</b>	<b>OVERALL PROJECT SCOPE</b>						
<b>Company Name</b>	<b>Vendor1</b>	<b>Name2</b>	<b>Name3</b>	<b>Vendor4</b>	<b>Vendor5</b>	<b>Total Possible</b>	<b>Module Weight</b>
<b>Percent score by Module</b>							
Distribution Modules in the Package	0%	0%	0%	0%	0%	0	5
Warehousing & Related Modules	42%	89%	68%	97%	38%	110	8
Transportation Modules	0%	0%	0%	0%	0%	0	8
SUPPORT - TRAINING - ETC	48%	86%	98%	86%	73%	166	5
OPERATING SYSTEMS SUPPORT	59%	71%	65%	59%	71%	34	10
DATABASES SUPPORTED	7%	21%	25%	18%	18%	56	5
GENERAL INFORMATION	52%	72%	93%	90%	98%	326	5
ORDER ENTRY	69%	100%	100%	100%	100%	32	5
LABOR MANAGEMENT	17%	50%	71%	67%	67%	240	10
REPORTS FOR CUSTOMERS	88%	41%	100%	88%	79%	56	0
BIN SETUP	28%	63%	97%	97%	83%	72	5
PRODUCT SETUP	36%	27%	90%	87%	90%	338	5
INVENTORY SETUP/MGMT	23%	46%	79%	83%	85%	600	5
INVENTORY COSTS & PRICES	0%	33%	50%	50%	67%	12	0
RADIO FREQUENCY (RF)	23%	91%	91%	100%	95%	430	8
TASK MANAGEMENT	18%	62%	88%	94%	82%	340	10
ERROR CAPTURE & ANALYSIS	17%	8%	98%	90%	81%	240	5
COMPLIANCE LABELING	0%	0%	0%	0%	0%	0	0
Outbound Orders / Wave Plan	0%	64%	94%	98%	75%	436	8
Wave Release / Picking	11%	68%	94%	99%	93%	360	8
REPLENISHMENT	0%	100%	100%	100%	100%	100	8
RECEIVING - PUTAWAY - MOVE	43%	67%	91%	99%	93%	692	8
DAMAGED GOODS CONTROL	36%	0%	50%	91%	82%	44	7
Cycle Counting / Reverse Kit	0%	67%	78%	67%	83%	180	10
INTERFACE	19%	7%	50%	24%	56%	218	5
PUBLIC WAREHOUSING	0%	76%	100%	83%	93%	76	0
PRODUCT ALLOCATION	0%	22%	61%	100%	87%	232	10
EDI DOCUMENTS	0%	17%	70%	55%	46%	400	0
DOCK APPOINTMENT	0%	0%	80%	75%	30%	20	0
RETURN PROCESSING	41%	81%	99%	100%	64%	148	10
WEB ENABLED	26%	43%	96%	39%	63%	230	0
TRANSPORTATION MGMT	0%	0%	0%	0%	0%	0	0
Production Requirements	5%	95%	100%	100%	100%	44	10
Business Partners or Turnkey Solut	0%	100%	100%	100%	58%	24	10
<b>OVERALL PROJECT SCOPE</b>							
Simple Total Score	23%	55%	85%	84%	80%	6256	

**Image 5 – Summary Analysis – Presentation Mode**

One may indicate a category/module weight value (0 to 10). One may reduce vendor scoring by setting selected modules to a zero weight. Important categories are increased with a weight value of 10.

Conclusion: Vendors 3 & 4 are the stronger contenders with 5310 and 5259 scores respectfully.

Summary Analysis		OVERALL PROJECT SCOPE					Total	Module
Company Name	Vendor1	Name2	Name3	Vendor4	Vendor5	Possible	Weight (1-	
Distribution Modules in the Packa	0	0	0	0	0	0	5	
Warehousing & Related Modules	46	98	75	107	42	110	8	
Transportation Modules	0	0	0	0	0	0	8	
SUPPORT - TRAINING - ETC	80	142	162	142	122	166	5	
OPERATING SYSTEMS SUPPORT	20	24	22	20	24	34	10	
DATABASES SUPPORTED	4	12	14	10	10	56	5	
GENERAL INFORMATION	170	236	304	294	319	326	5	
ORDER ENTRY	22	32	32	32	32	32	5	
LABOR MANAGEMENT	40	120	170	160	160	240	10	
REPORTS FOR CUSTOMERS	49	23	56	49	44	56	0	
BIN SETUP	20	45	70	70	60	72	5	
PRODUCT SETUP	120	92	304	294	304	338	5	
INVENTORY SETUP/MGMT	140	277	476	500	508	600	5	
INVENTORY COSTS & PRICES	0	4	6	6	8	12	0	
RADIO FREQUENCY (RF)	100	390	390	430	410	430	8	
TASK MANAGEMENT	60	210	300	320	280	340	10	
ERROR CAPTURE & ANALYSIS	40	20	235	215	195	240	5	
COMPLIANCE LABELING	0	0	0	0	0	0	0	
Outbound Orders / Wave Plan	0	280	412	426	329	436	8	
Wave Release / Picking	40	244	338	355	335	360	8	
REPLENISHMENT	0	100	100	100	100	100	8	
RECEIVING - PUTAWAY - MOVE	300	462	628	683	643	692	8	
DAMAGED GOODS CONTROL	16	0	22	40	36	44	7	
Cycle Counting / Reverse Kit	0	120	140	120	150	180	10	
INTERFACE	42	16	108	52	123	218	5	
PUBLIC WAREHOUSING	0	58	76	63	71	76	0	
PRODUCT ALLOCATION	0	50	142	232	202	232	10	
EDI DOCUMENTS	0	69	278	218	182	400	0	
DOCK APPOINTMENT	0	0	16	15	6	20	0	
RETURN PROCESSING	60	120	146	148	95	148	10	
WEB ENABLED	60	100	220	90	145	230	0	
TRANSPORTATION MGMT	0	0	0	0	0	0	0	
Production Requirements	2	42	44	44	44	44	10	
Business Partners or Turnkey Sol	0	24	24	24	14	24	10	
<b>OVERALL PROJECT SCOPE</b>								
Simple Total Score	1431	3410	5310	5259	4993	6256		
<b>Total Possible Score</b>								
<b>6256</b>								