

Creating the Proposal Team (Adding Participants)

Last Modified on 10/29/2018 3:06 pm MST

Engagement Managers Create Proposal Teams

Engagements Managers create proposal teams by issuing Invitations to Participate to the individual(s) who will be working on the bid response.

NOTE: if you are an Engagement Manager (accepts Invitations to Bid) and wish to also access the bid documents and work on the bid response, you will have to invite yourself, too, as described below.

NOTE: Invitations are sent via email from the address 'notify@decisiondirector.com'. Sometimes invitations will get caught up in junk mail. Please be sure your team and email administrators add 'notify@decisiondirector.com' to their whitelist.

From the Engagement Manager's dashboard, the Engagements link will lead to the place where bid invitations and responses are managed.

The screenshot shows the Decision Director platform interface for user Diane White. The top navigation bar includes 'Dashboard', 'Messages', 'Access', and 'Account Settings'. The main content area is divided into several sections: 'Organizations', 'Workspaces', and 'Activities'. The 'Organizations' section is highlighted with a red box, and the 'Engagements' link is highlighted with a red box. A blue arrow points from the 'Engagements' link to a text box that says 'Proposal (or "Engagement") Managers...'. Another blue arrow points from the 'Engagements' link to a text box that says '...manage bid invitations and bid responses through the Engagement link on their Organization's widget.'

Invitations to Participate are issued through the Active Engagements link on the Engagements tab. (See [Managing Engagements \(Bids\)](#) for an explanation of the Engagements tab).

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

Engagement Name	Organization	Activity	Engagement Type
APEX HCM Systems	Advantiv University	HR/Payroll RFP - 2014-05-13-B007.A-DNU	Bid
APEX HCM Systems	Advantiv University	SAMPLE>> HR/Payroll RFP 2015-A0027	Bid

From within the Engagements tab, select Active Engagements, and then click on the engagement (bid) you wish to manage.

Copyright © 2015, Advantiv Solutions, LLC. | Terms of Use

Powered by the DecisionDirector® platform

Selecting Proposal Team Members

The Engagement Manager accesses the Participants tab on the Engagement record to begin the process of creating the Proposal Team.

The Participants tab offers the option of adding respondents one at a time or as a group.

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

From the Participants tab, the Engagement Manager can invite participants, send invitations, re-send invitations, and see who has and who has not yet accepted.

Engagement Listing

Current Status: Open

Engagement Name: APEX HCM Systems

Engagement Type: Bid

Created On: 9/1/2015 11:02 PM MST

From: Advantiv University > HR/Payroll RFP Project - 2015 > SAMPLE>> HR/Payroll RFP 2015-A0027

Progress Tracker Participants History

Show All Participants - Default (1) Export List

Add Multiple Participants Add Participant

Person Email Status Last Status Change On

dwhite001@dddemo.com Accepted 9/18/2016 12:27 PM

Two options for inviting participants - one at a time or many at a time

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use

Powered by the DecisionDirector® platform

Adding Multiple Response Participants

The Add Multiple Participants button makes it easy to add one or more team members to the RFP response. Click the button, type or paste in email addresses, and then click Continue.

Note: Invitations are based on the person's email address. If the person already has a DecisionDirector account, it is best that you use the email address associated with that person's DecisionDirector account - otherwise, they may end up creating a new DecisionDirector account, or you may have to issue a new invitation to the correct address.

The screenshot shows the DecisionDirector web interface for the organization 'APEX HCM Systems (d)'. A modal dialog box titled 'Add Multiple Participants' is open, prompting the user to 'Enter email addresses below (one per line)'. The dialog box contains a list of email addresses: mary.jones@apexhcm.com, robert.smith@apexhcm.com, william.robins@apexhcm.com, darcy.figg@apexhcm.com, james.babbett@apexhcm.com, and marlene.johnson@apexhcm.com. A 'Continue' button is located at the bottom right of the dialog box. In the background, the 'Add Multiple Participants' button is highlighted with a red box, and a blue arrow points from it to the dialog box. Another blue arrow points from the 'Continue' button in the dialog box to the 'Continue' button in the background. A red box also highlights the 'Continue' button in the background.

Verifying Email Addresses

DecisionDirector will verify that the email addresses are valid and that the persons have not already been invited. If everything is ok, then proceed by clicking the Complete - Add x Participants button.

If there is a problem with any email address, DecisionDirector will provide diagnostic information. Go back to correct issue by clicking the Return to First Step button.

DECISION DIRECTOR

Organization: APEX HCM Systems (d)

Engagements

Active Engagements

Invitations

DecisionDirector

Add Multiple Participants

Cancel / Close Window

Result Summary: Attempting to add: 6 OK to add: 6

mary.jones@apexhcm.com	OK
robert.smith@apexhcm.com	OK
william.robbins@apexhcm.com	OK
darcy.figg@apexhcm.com	OK
james.babbett@apexhcm.com	OK
marlene.johnson@apexhcm.com	OK

Emails are verified; if ok, click Complete button; if not ok, Return to First Step to correct issues.

Return to First step

Complete - Add 6 Participants

Copyright © 2016, Advantiv Solutions, LLC. | IT

HR/Payroll RFP 2015-A0027

Add Multiple Participants

Add Participant

Last Status Change On

9/18/2016 12:27 PM

Powered by the DecisionDirector® platform

Sending the Invitations

When the Participants have been selected, the Engagement Manager can issue the invitations. The following sequence of screens shows how this is accomplished.

DECISION DIRECTOR Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

- Active Engagements
- Invitations

Engagements

Current Status: Open

Engagement Name: APEX HCM Systems

Engagement Type: Bid

Created On: 9/1/2015 11:02 PM

From: Advantiv University

HR/Payroll RFP 2015-A0027

Progress Tracker Participants History

Show All Participants - Default (7) Export List Add Multiple Participants Add Participant

Person Email	Status	Last Status Change On	
dwhite001@dddemo.com	Accepted	9/18/2016 12:27 PM	
mary.jones@apexhcm.com	No invitation created / sent		
robert.smith@apexhcm.com	No invitation created / sent		
william.robbins@apexhcm.com	No invitation created / sent		
darcy.figg@apexhcm.com	No invitation created / sent		
james.babbett@apexhcm.com	No invitation created / sent		
marlene.johnson@apexhcm.com	No invitation created / sent		

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use Powered by the DecisionDirector® platform

Invitations have been created and now must be sent.

Invitations can be sent one at a time by clicking the "Send" icon...

...or many at a time via a participant admin function from this list.

The Participant function selector offers views and invitation management options. "Send Invitations" allows the Engagement Manager to send any or all invitations.

DECISION DIRECTOR Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

- Active Engagements
- Invitations

Engagements

Current Status: Open

Engagement Name: APEX HCM Systems

Engagement Type: Bid

Created On: 9/1/2015 11:02 PM

From: Advantiv University

HR/Payroll RFP Project - 2015 > SAMPLE >> HR/Payroll RFP 2015-A0027

Progress Tracker Participants History

Show All Participants - Default (7) Export List Add Multiple Participants Add Participant

Views

- Show All Participants - Default (7)
- Show Participants that have Accepted (0)
- Show Participants that have Not Yet Accepted (0)
- Show Participants that have Declined (0)

Bulk Operations

- Send Invitations (6)**
- Extend Expired Invitations (0)
- Delete - Invitations not yet sent (6)

Person Email	Status	Last Status Change On	
dwhite001@dddemo.com	Accepted	9/18/2016 12:27 PM	
mary.jones@apexhcm.com	No invitation created / sent		
robert.smith@apexhcm.com	No invitation created / sent		
william.robbins@apexhcm.com	No invitation created / sent		
darcy.figg@apexhcm.com	No invitation created / sent		
james.babbett@apexhcm.com	No invitation created / sent		
marlene.johnson@apexhcm.com	No invitation created / sent		

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use Powered by the DecisionDirector® platform

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

Engagements

Engagement Listing

Current Status: Open Abandon...

Engagement Name: APEX HCM Systems

Engagement Type: Bid

Created On: 9/1/20

From: Advan 15 > SAMPLE>> HR/Payroll RFP 2015-Au 27

Progress Tracker Participants History

Send Invitations (6) Export List

Person Email	Status	Last Status Change On
mary.jones@apexhcm.com	No invitation created / sent	
robert.smith@apexhcm.com	No invitation created / sent	
william.robbins@apexhcm.com	No invitation created / sent	
darcy.figg@apexhcm.com	No invitation created / sent	
james.babbett@apexhcm.com	No invitation created / sent	
marlene.johnson@apexhcm.com	No invitation created / sent	

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use

Powered by the DecisionDirector® platform

The Engagement Manager then completes the composition of the invitation message by setting an expiration date for the invitation and adding a note to be included in the body of the invitation message. Clicking Send causes the invitation to be sent by email to each person, and for a message to be added to each person's DecisionDirector Message Log.

Note: Each person **MUST ACCEPT** the invitation in order to be given access to the bid response activity. The Engagement Manager will receive a notice for each acceptance as well as each declined invitation.

The Participants tab will also show the status of each person's invitation (Not Sent, Invited, Accepted, or Declined).

Set an expiration date for the message, add a personal note, then click Send.

The invitees will each receive an email and a message in the Message Log.

In order to work on the bid, they must Accept the invitation.

The screenshot shows the "DecisionDirector - Invitation" window. The "Expires On" field is highlighted with a red box. The "Message to Invitee" field contains the text: "INVITATION to PARTICIPATE -> Bid Respondent request for SAMPLE>> HR/Payroll R". The "Text" field contains: "You have been invited to provide responses on behalf of Advantiv University for the bid entitled SAMPLE>> HR/Payroll RFP 2015-A0027. If you are able to assist, please Accept this invitation, and the bid will appear on your dashboard. Otherwise, you may Decline this invitation." The "Additional Text" field contains: "Thanks for helping on this bid!". The "Send" button is also highlighted with a red box.

NOTE: The expiration date of an invitation is not (technically) related to the due date for the RFP. The invitation expiration date determines when the invitation is no longer active, and the person who received it can no longer accept or decline.

Most Bid Managers will set the invitation expiration to be a few weeks prior to the due date of the RFP. This is a good practice as it creates a sense of urgency and need for timeliness.

Some Bid Managers will set the invitation expiration date to the same date and time as the RFP due date. This is not helpful as there is no reminder facility in DecisionDirector and, even if there were, accepting an invitation to join the response team at the last minute is unlikely to be very helpful.