

Submitting (and Unsubmitting) Bids

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Submitting a Bid

When a bid is 100% complete (meaning = at minimum, all REQUIRED items are fully answered) and ready to submit, the vendor's **Engagement Manager** will go through the following steps in order to submit the bid:

1. Select the bid from the list of active engagements.
2. Confirm that the bid is eligible for submission.
3. Submit.

If your client has instructed you to upload your DecisionDirector response to another site as your official bid submission, see [Generating a Document Zip File for Upload](#).

IMPORTANT NOTE: Even if the official bid submission takes place on another site, whether an upload of your DecisionDirector response is required or not, you MUST ALSO go through the DecisionDirector submission process as this is the ONLY WAY to make your DecisionDirector bid response available for extraction and evaluation.

Accessing Active Engagements

Go to your dashboard. Click the Engagements link for your company.

(If you are tasked with submitting bids and do not have an Engagements link, then you will need to have your DecisionDirector administrator assign the role of Engagement Guest to you. If you do not know who your administrator is, you can contact [Advantiv Support](#).)

DECISION DIRECTOR

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Diane White

Dashboard Messages Access Account Settings

Organizations -

APEX HCM Systems (d)
Top Level Organization

Dashboard Engagements

APEX HCM Systems is a provider of world-class Human Capital Management systems for manufacturing, government, and education.

Workspaces +

Activities +

Users +

From her dashboard, Diane can access the Engagements link for her company to view and manage bids and bid invitations.

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The click the Active Engagements link. This will reveal the list of active engagements.

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Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

- Active Engagements
- Invitations

Active Engagements
APEX HCM Systems (d) Engagements.

Invitations
Engagement Invitations for APEX HCM Systems (d).

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Diane wishes to submit a bid. She will click the Active Engagements link to see the list of bids.

Select the Bid to be Submitted

Choose the bid you wish to submit by clicking on the its entry in the list of engagements.

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Organization: APEX HCM Systems (d)

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

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Diane selects this bid to view its status and to submit.

Review Status and Submit Bid

The **Progress Tracker** tab shows the status of the bid. **Only when all required items are answered, and only if it is still prior to the due date and time, may a bid be submitted.**

If these two conditions are not met, then DecisionDirector will not display the Submit link (pointed to by the arrow on the right).

Click the Submit link to submit the bid. You will be prompted to provide an internal note for the submission log. The customer will not see this note.

Once submitted, the bid can be viewed but can no longer be modified, and the **Submit link will now become the**

Unsubmit link. The customer will have view-only access to the bid once the due date and time arrives, and never before.

Bids are eligible for submission only if a) 100% of the required items have been answered, and b) the due date/time has not yet arrived.

Organization: APEX HCM Systems (d)

Engagement Type: Bid

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

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

Step Name	Timeframe	Input Summary	Submission Status	Actions
Initial Response Collection	Start: 3/15/2016 8:00 AM MST End: 6/13/2016 5:00 PM MST	All Items Transactional Items: 6164 / 6164 100% Files: 0 / 0 0%	Un-Submitted	Submit Archive Reports
		Required Items Transactional Items: 6164 / 6164 100% Files: 0 / 0 0%		

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Unsubmitting a Bid

Should you wish to revise your bid after it has been submitted, you may do so only if it is still prior to the due date and time. You will click the Unsubmit link to return the bid to unsubmitted status, and you and your team may revise the bid.

Of course, if you decide to no-bid after you have submitted the bid, you may unsubmit it, provided that you do so before the due date and time. Unsubmitted bids are never seen by the customer.

IMPORTANT NOTE: If you Unsubmit a bid in order to revise it, you must Submit the bid again if you intend for the customer to receive it.