

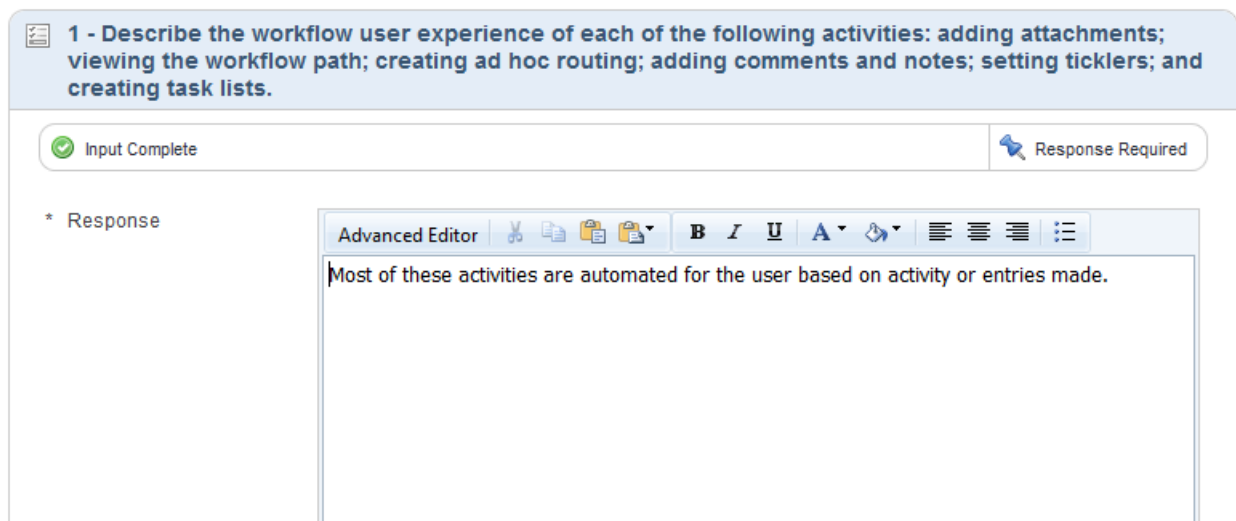
# Generating a Response Document for Quality Review

Last Modified on 02/05/2022 1:50 pm MST

## Why Generate and Review a Response Document?

Answer: Because the client will.

An important step in responding to an RFP in DecisionDirector is to **periodically generate and review any response document(s) that contain rich text response fields**, like the one shown below:



The screenshot shows a software interface for a response document. At the top, a blue header bar contains the text: "1 - Describe the workflow user experience of each of the following activities: adding attachments; viewing the workflow path; creating ad hoc routing; adding comments and notes; setting ticklers; and creating task lists." Below the header, there is a status bar with a green checkmark and the text "Input Complete" on the left, and a blue pin icon with the text "Response Required" on the right. The main content area is labeled "\* Response" and contains a rich text editor. The editor's toolbar includes icons for "Advanced Editor", cut, copy, paste, undo, redo, bold (B), italic (I), underline (U), text color (A), background color, bulleted list, numbered list, and indent. The text within the editor reads: "Most of these activities are automated for the user based on activity or entries made."

This is important because after the bid has been submitted and the due date arrives, the client will use DecisionDirector's document generation feature to produce readable proposal documents. You will want to be sure that when the client generates your proposal document it looks as good as it possibly can. Periodic reviews will help to ensure a high-quality proposal document.

### About this Article

This article walks through the steps required to generate and review a response document.

See other related articles for more information.

## Selecting the Document to Generate

From either the Collaboration Summary or the list on the left, select the document you wish to review.

DECISION DIRECTOR Jim Phelps Quick Nav Learn More Support

**Activity: SAMPLE>> HR/Payroll RFP 201-A0027**  
 Organization: Advantiv University > Workspace: HR/Payroll RFP Project

Step: Initial Response Collection (8/31/2018 8:00 AM MST - 10/4/2018 8:00 AM MST) Bid: MiCon

Documents Collaboration Summary

- HR Mandatory Items
- HR Preliminary Requirements
- HR Functional Questions
- HR Functional Requirements
- Future-State Business Processes
- PO Terms and Conditions
- Pricing Form
- WCAG 2.0 VPAT
- Section 508 VPAT

Collaboration Summary Bookmarks: 0 Instructions Bid Submission Status: Un-Submitted Document Mode: View Only

Document	All Items		Required Items	
	% Complete	Complete/Total	% Complete	Complete/Total
HR Mandatory Items	100%	6 / 6	100%	6 / 6
HR Preliminary Requirements	100%	33 / 33	100%	33 / 33
HR Functional Questions	19%	42 / 222	100%	41 / 41
HR Functional Requirements	0%	0 / 880	0%	0 / 0
Future-State Business Processes	100%	10 / 10	100%	10 / 10
PO Terms and Conditions	33%	1 / 3	0%	0 / 0
Pricing Form	100%	1 / 1	100%	1 / 1
WCAG 2.0 VPAT	0%	0 / 61	0%	0 / 0
Section 508 VPAT	0%	0 / 81	0%	0 / 0
<b>Total</b>	<b>7%</b>	<b>93 / 1297</b>	<b>100%</b>	<b>91 / 91</b>

[Reports / Extracts](#)

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Select the document

## Invoke the Generate Document Function

DECISION DIRECTOR Jim Phelps Quick Nav Learn More Support

**Activity: SAMPLE>> HR/Payroll RFP 201-A0027**  
 Organization: Advantiv University > Workspace: HR/Payroll RFP Project

Step: Initial Response Collection (8/31/2018 8:00 AM MST - 10/4/2018 8:00 AM MST) Bid: MiCon

Documents Collaboration Summary

- HR Mandatory Items
- HR Preliminary Requirements
- HR Functional Questions
- HR Functional Requirements
- 1 - Applicant Management
- 2 - Benefits
- 3 - Employee Compensation
- 4 - Employee Relations
- 5 - Employment
- 6 - Health and Safety
- 7 - Other HR Functionality
- 8 - Personnel
- 9 - Position Management
- 10 - Retirement
- 11 - Self Service
- 12 - Workers Compensation
- Future-State Business Processes
- PO Terms and Conditions
- Pricing Form
- WCAG 2.0 VPAT
- Section 508 VPAT

Responses Bookmarks: 0 Instructions Bid Submission Status: Un-Submitted Document Mode: View Only

**HR Functional Requirements** [Generate Document](#) [Reports / Extracts](#) | [Summary](#)

- 1 - Applicant Management
- 2 - Benefits
- 3 - Employee Compensation
- 4 - Employee Relations
- 5 - Employment
- 6 - Health and Safety
- 7 - Other HR Functionality
- 8 - Personnel

Generate Document

## Select a Document Template

This controls how the document will be generated. There is usually only one choice.

The screenshot displays the 'DecisionDirector' 'Generate Document' dialog box. The 'Document Name' is 'HR Functional Requirements'. The 'Output' is 'Download / Screen'. The 'Document Type' is 'MS Word'. The 'Show Empty Response Tables?' is 'Yes'. The 'Response Table Style' is 'Prompts and Inputs'. The 'Include Attachments?' is 'Yes'. The 'Document Template' dropdown is highlighted with a red box and is open, showing a list of templates. The selected template is 'DecisionDirector Baseline Template - Portrait - TOC Level 1'. A blue callout box points to the dropdown with the text: 'Select a Document Template. Usually, there is only one choice. The default values for all other settings are usually good.'

## Generate the Document

This will produce an archive (or Zip) file. Extract it to a folder of your choosing, and then open the Word document.

***BE PATIENT: It may take several moments up to a minute or more for the Zip file to be generated.***

DECISION DIRECTOR

Activity: **SAMPLE>> HR/Payroll RFP 201-A0027**  
Organization: Advantiv University > Workspace: HR/Payroll RFP Project

Step: Initial Response Collection (8/31/2018 8:00 AM MST - 10/4/2018 8:00 AM MST)

Documents

List

- HR Mandatory Items
- HR Preliminary Requirements
- HR Functional Questions
- HR Functional Requirements
  - 1 - Applicant Management
  - 2 - Benefits
  - 3 - Employee Compensation
  - 4 - Employee Relations
  - 5 - Employment
  - 6 - Health and Safety
  - 7 - Other HR Functional Requirements
  - 8 - Personnel
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  - 10 - Retirement
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  - 12 - Workers Compensation
- Future-State Business Process
- PO Terms and Conditions
- Pricing Form
- WCAG 2.0 VPAT
- Section 508 VPAT

Generate Document

Document Name: HR Functional Requirements

Output: Download / Screen

Document Type: MS Word

Show Empty Response Tables?: Yes

Response Table Style: Prompts and Inputs - Individual

Include Attachments?: Yes

Document Template: DecisionDirector Baseline Template - Portrait - TOC Level 1

Template Description: DecisionDirector Baseline Template - Portrait - TOC Level 1

Generate Document

Click "Generate Document". A Zip file will be produced. Extract the archive and open the Word document.

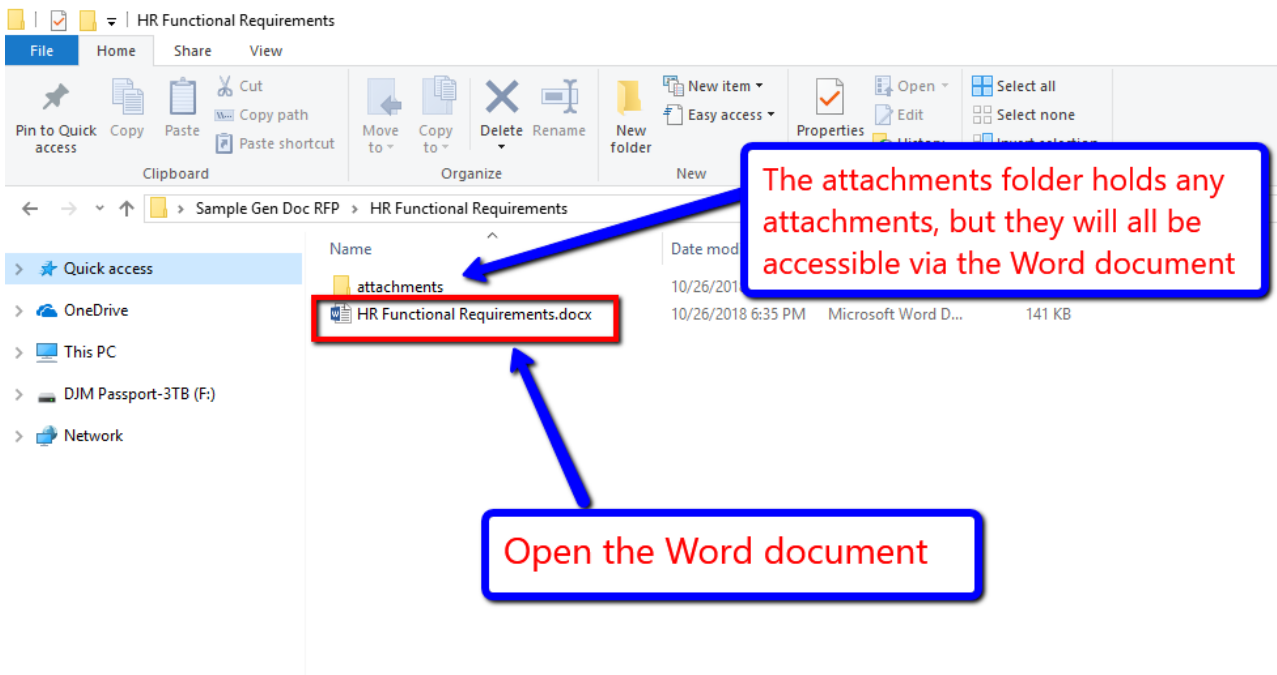
It may take a few moments to produce the Zip file.

## Open the Generated Word Document

The extract will produce a folder that contains the generated Word document and a sub-folder entitled "attachments".

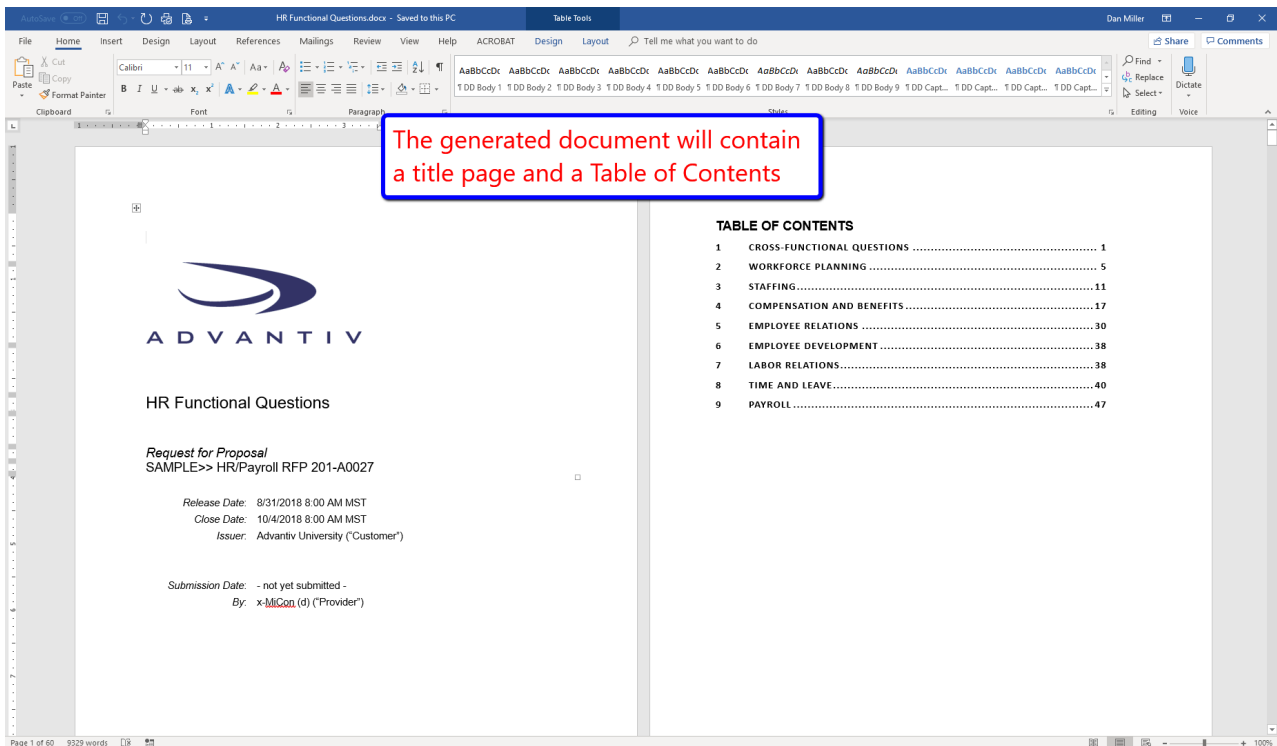
When you extract the archive (or Zip) file, the Word document will include links to the attachments to make it easy for the client to review. You may also open the "attachments" sub-folder to view the attachments individually.

Additionally but not shown here, there is a Contents.htm file in the attachments sub-folder that you can open to view a manifest of all attachments.



## The Generated Word Document

DecisionDirector generates the Word document by combining the contents of the RFP document with the responses and attachments that you and your team have entered. This allows the clients to have a uniform document format for all bidding vendors.



## Review the Word Document

You should scroll through the document to verify that the a) formatting is good, that the b) section and item numbering structure and scheme appears to line up with the numbering in DecisionDirector, and that c) the attachment links operate as expected.

### Formatting Review

This applies to the rich text fields that are frequently provided as part of the response format in DecisionDirector. Since formatting is available in these fields in DecisionDirector, it is important to ensure that the generated Word document looks good, too. Remember: DecisionDirector is a web application that relies on HTML for formatting, While HTML formatting will usually translate well into a Word document format, it sometimes does not.

Also, DecisionDirector does allow you to paste content into these rich text fields. Often, that content will come from a Word document which, if not done carefully, can lead to undesired results when generated back into a Word document by DecisionDirector.

If you are having difficulty with formatted responses not appearing as you wish, see the article: [Pasting Response Content from a MS-Word Document](#).

## Section and Item Numbering

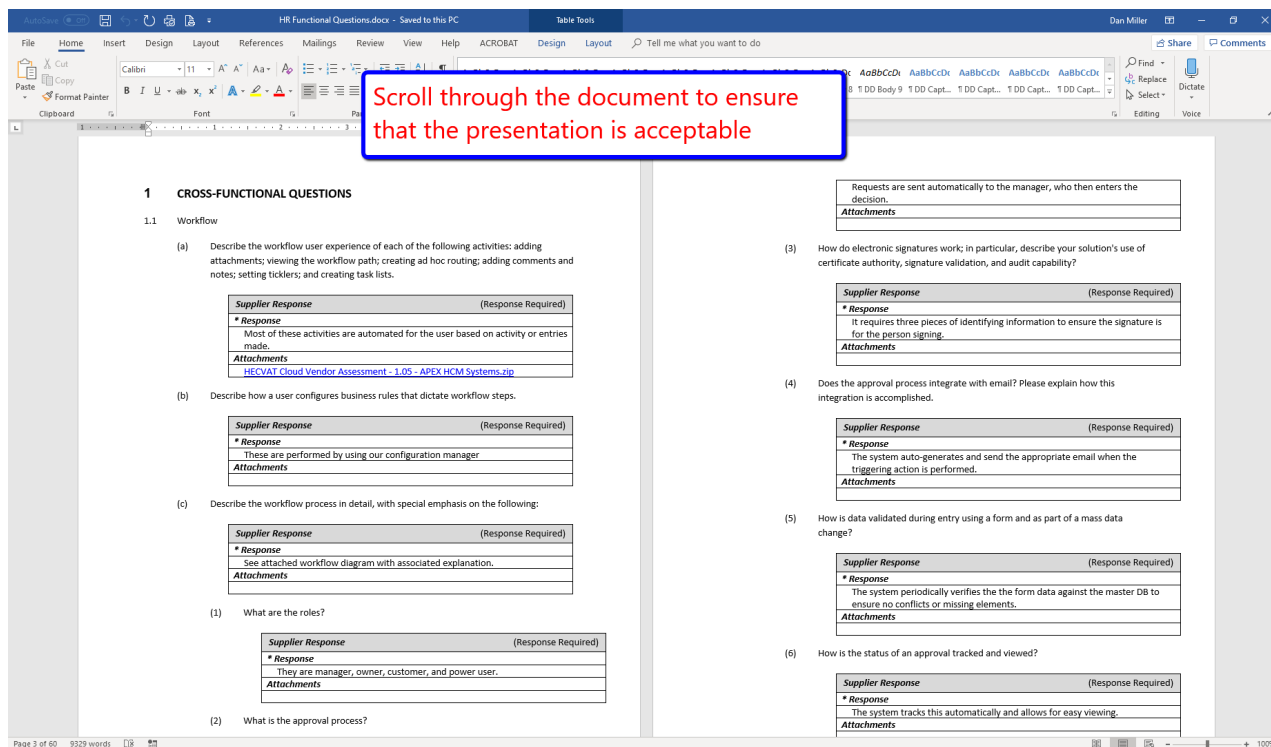
The document generated by DecisionDirector uses Word's Heading Styles to provide structure and hierarchy to the generated document. This is also what allows for the Table of Contents to be generated, as well.

If the content you paste into DecisionDirector also contains Heading Styles, it will cause the numbering in the generated document to be off. It is best to first scan the Table of Contents and compare to the primary sections of the document as shown in DecisionDirector when the document is selected.

Then, spot check the document for the numbers of the last item (or requirement) in a few sections and compare with the numbers in DecisionDirector. They should be the same, although some document templates in DecisionDirector may use letters instead of numbers.

## Confirming Attachment Links

This is a straightforward test. Spot check the attachment links to ensure that the selected attachments open up as you would expect them to.



## Suppress Attachments for a Quick Review

You can conduct a quick review by selecting "No" for the "Include Attachments?" option. This will bypass the creation

of the Zip file and allow you to open the generated document immediately.

DecisionDirector 2 - Benefits

Generate Document Close Window

Document Name: HR Functional Req

\* Output: Download / Screen

\* Document Type: MS Word

\* Show Empty Response Tables? Yes

\* Response Table Style Prompts and Inputs - Individual Rows

\* Include Attachments? No

Template

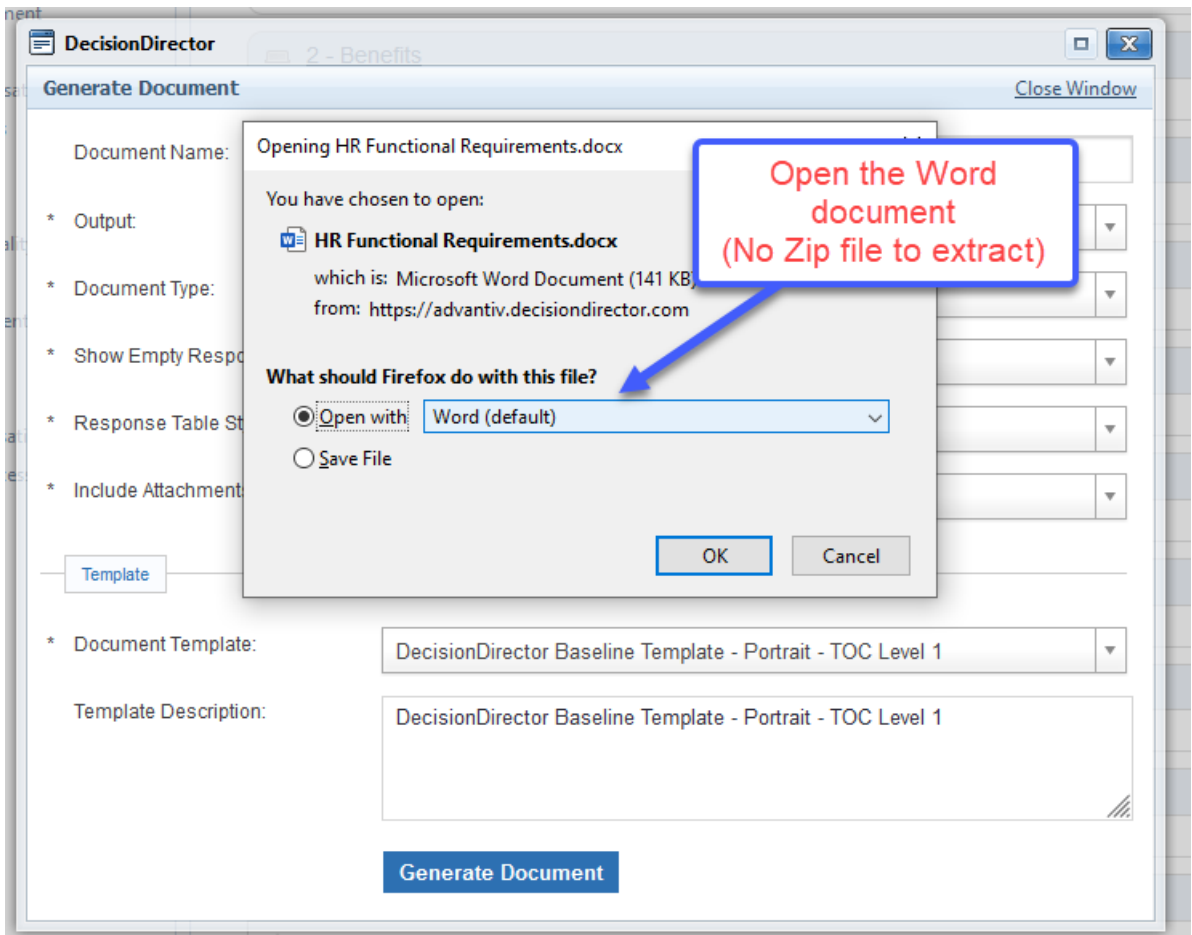
\* Document Template: DecisionDirector Baseline Template - Portrait - TOC Level 1

Template Description: DecisionDirector Baseline Template - Portrait - TOC Level 1

Generate Document

Select "No" to suppress attachments and generate only the Word document

**BE PATIENT:** It make take several moments up to a minute or more for the document to be generated.



## Need Support?

If you have any difficulty, please send a note to [support@advantiv.com](mailto:support@advantiv.com) and attach the archive file that you generated.

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