

# Generating a Document Zip File for Upload

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## Generate a Zip File for Upload to a Client's Bid Site

### About this Article

Some clients will require bidders to upload bid response documents to the client's bid site. This article walks through the steps required to generate a Zip file for each response document.

**TIP: You may wish to QA your response document before uploading:** See [Generating a Response Document for Quality Review](#).

## Selecting the Document

From either the Collaboration Summary or the tree list on the left, select the document. **Be sure that you have answered 100% of the Required Items.**

The screenshot displays the 'DECISION DIRECTOR' interface for 'Activity: SAMPLE >> HR/Payroll RFP 201-A0027'. The user is logged in as 'Jim Phelps'. The interface shows a 'Collaboration Summary' for the activity, with a 'Step: Initial Response Collection (8/31/2018 8:00 AM MST - 10/4/2018 8:00 AM MST)'. A left-hand navigation tree lists various document categories, with 'HR Functional Requirements' highlighted. The main table displays the following data:

Document	All Items	Required Items		
		% Complete	Complete/Total	
HR Mandatory Items	100%	6 / 6	6 / 6	
HR Preliminary Requirements	100%	33 / 33	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>

Annotations include a blue box around 'HR Functional Requirements' in the left tree with the text 'Select the document', and another blue box around the 'Required Items' column header with the text 'Be sure 100% of the required items, if any, are completed'.

## Invoke the Generate Document Function

Activity: **SAMPLE>> HR/Payroll RFP 201-A0027**

Organization: Advantiv University &gt; Workspace: HR/Payroll RFP Project

Dashboard

Collaborate

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

Bid: MiCon

Documents

Collaboration Summary

Responses

Bookmarks: 0

Instructions

Bid Submission Status: Un-Submitted

Document Mode: View Only

## 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 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

## 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

Click the Generate Document link

## Select a Document Template

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

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
  - 9 - Position Management
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  - 11 - Self Service
  - 12 - Workers Compensation
- Future-State Business Processes
- PO Terms and Conditions
- Pricing Form
- WCAG 2.0 VPAT
- Section 508 VPAT

DecisionDirector

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 - I

\* Include Attachments? Yes

Template

\* Document Template:

Template Description:

- Select -

- DecisionDirector Baseline Template - Portrait
- DecisionDirector Baseline Template - Landscape
- DecisionDirector Baseline Template - Portrait - TOC Level 1
- DD Landscape

Select a Document Template

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. Be sure to leave the "Include Attachments?" option set to "Yes".

Save the Zip file to the location of your choice.

**MAKE NO MODIFICATIONS TO THE ZIP FILE OR THE DOCUMENTS CONTAINED WITHIN.**

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

DECISION DIRECTOR Jim Phelps Quick Nav Learn More Support

AD VU 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
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- Future-State Business Processes
- 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.

Generate the Zip File

## Upload the Zip File

Upload the Zip file as instructed by the client.

## Dealing with File Size Limitations

If the client's bid site has file size limitations, see: [Minimizing the Size of Generated Documents](#).

## Repeat Process for All Response Documents

If the RFP contains multiple response documents, repeat this process until all documents have been generated as Zip files and uploaded to the client's bid site.

## 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.