

Managing Bids (aka Engagements)

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The Functions of an Engagement Manager

The main function of an Engagement Manager is to manage engagements. (In DecisionDirector, the term "engagement" is a broader concept than just "bids", but you can think of an Engagement Manager as a bid manager).

Engagement management functions include:

- Responding to Invitations to Bid (accept or decline)
- Reviewing the current status of bids
- Generating bid documents and reports
- Inviting people to work on bid responses
- Submitting bid responses

The Engagements Tab

The Engagements tab provides Engagement Managers with administrative control over their invitations and active engagements (aka bids ;).

The image below shows the dashboard of a Diane White, an Engagement Manager for a software company named APEX.

The screenshot displays the DecisionDirector user interface. At the top, the user is identified as Diane White. The main dashboard area shows a list of organizations, with 'APEX HCM Systems' selected. A red box highlights the 'Engagements' link next to the organization name. A blue arrow points from the 'Engagements' link to a text box that reads: 'Engagement Managers click the Engagements link to manage bids on behalf of their organization.' Another blue arrow points from the user's name to a text box that reads: 'Diane is an Engagement Manager for APEX HCM Systems'. The dashboard also shows sections for Organizations, Workspaces, and Activities. The footer contains copyright information for Advantiv Solutions, LLC and a note that the platform is powered by the DecisionDirector® platform.

Clicking on the Engagements link from the dashboard reveals the Engagements tab for the organization. From here, Diane can view and manage Invitations to Bid, and view and manage engagements (created when Invitations to Bid are accepted).



Organization: APEX HCM Systems

Dashboard Engagements Configuration

Engagements

Active Engagements
Invitations

Active Engagements

APEX HCM Systems Engagements.

Invitations

Engagement Invitations for APEX HCM Systems.

The Engagements tab allows Engagement Managers to manage Invitations to Bid and active engagements (bids).

Read the article on [Accepting \(or Declining\) an Invitation to Bid](#).