Managing Bids (aka Engagements)

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.

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).

DECISION DIRECTOR

Diane White ▾   Quick Nav ▾   Learn More ▾   Support ▾

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).

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Read the article on Accepting (or Declining) an Invitation to Bid.