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Workforce Management Administrator's Guide

Time-Off Bidding

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Contents

- 1 Bidding periods
 - 1.1 Date and time settings
- 2 Batch requests
- 3 Bid processing
 - 3.1 Bid process flow
- 4 Time-off balances
- 5 Wait list processing
- 6 Time-off limits
 - 6.1 Time-off limits in the Agents interface



- Administrator

Use time-off bidding periods to efficiently and fairly process your agents' vacation time-off requests.

Related documentation:

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Time-off bidding enables WFM to process agent requests for time off that are within configured bidding periods. This ensures that concurrent requests made for the time slot defined by the bidding period are granted, declined, or wait-listed during multiple iterations of bid processing, which occurs between the bidding period's **Start Date and Time** and **End Date and Time**. WFM grants these requests, based on the **Seniority and Rank** and **First come, first served** bidding period properties, if there are available time slots. After the bidding process is finished, WFM grants all other requests (previously not granted), based on the order of submission.

Time-off requests within a bidding period are processed multiple times, enabling agents to make changes to their requests when they do not get their preferred time-off choice in the first round, due to configured time-off limits. For example, if the highest-ranking agent's time-off request cannot be granted within a bidding period processing iteration, WFM waits for a period of time (set in the **Allowed Agent Timeout** bidding period property) to ensure that the agent has time to change his/her time-off request.

For information about time-off basics, when the bidding feature is not enabled, see the WFM Time Off Primer.

Bidding periods

Create and configure bidding periods in WFM Web for Supervisors Configuration view. Bidding periods define rules and constraints that are applied when agents enter their time-off requests and continue to be applied during bid processing. Time-off requests are processed between the Processing Start date/time and Closing date/time that is specified in the bidding period. Your contact center requirements will determine whether or not you need to create bidding periods.

Any changes you make to the bidding period can take effect immediately. If items are flagged by a bidding period and you later delete the period before the Processing Start date/time occurs, requests for that period are not processed unless you create a new bidding period that covers the dates of those items. If you enter items and then set the bidding period, items are processed if they are eligible for processing (flagged as Preferred, Wait-Listed).

If you need to temporarily suspend a bidding period process for any reason, you can do so by changing the **Do not process this bidding period** setting in the bidding period **Properties** pane. See Suspending Bidding Periods in the *Workforce Management Web for Supervisors Help*

Date and time settings

Bidding period properties include a few date and time settings, such as **Opening Date and Time**, **Processing Start Date and Time**, **Closing Date and Time**, **Start Date and Time**, and **End Date and Time**. You must understand how each of these settings (and all of the other properties of the bidding period) affect the bid assignment process, especially if you are creating multiple bidding periods, some with processes running in parallel.

The time zone for these dates/times is specified in the bidding period property **Time Zone**. For a description of this setting and all of the other configurable bidding period properties, see Bidding Period Properties in the *Workforce Management Web for Supervisors Help*.

Batch requests

WFM batches the agent's time-off request for several dates that fall within a bidding period, marks them as one request and, after all of the items pass validation, saves them to the WFM database. The initial request can contain any number of items.

A request can fall into several bidding periods, but is eligible for processing in only one bidding period. A request is eligible for processing if it is submitted between the bidding period's Opening date/time and the Closing date/time.

Agents cannot delete or recall a single item in a batch request that contains multiple items; WFM performs the same action on all items in the request. The same rule applies if the status of time-off items in the batch changes (to Granted, Preferred, or Declined). However, a supervisor can override it.

Bid processing

You can manually modify all items in a request before the Processing Start date/time. Items in a request that you manually grant are not automatically processed. WFM processes bidding items between the Processing Start date/time and the Closing date/time if the requests in the specified bidding period have not been processed.

During bid processing, any one of the following scenarios can occur:

- All items in request can be auto-granted (and possibly auto-published), based on the agent's ranking criteria, assuming agent's bidding status is set to Ready.
- WFM keeps all items in a request in Preferred status, if the following conditions apply:
 - Auto-grant does not apply for at least one item in the batch request.
 - The bidding period no longer applies (was deleted or edited) for at least one item in the request.
 - There are no time-off slots available to accommodate all batch request items during bid processing.

After bid processing is finished, requests can become eligible for wait-list processing on a first come, first served basis.

Bid process flow

This bid process flow is described here, in detail.

1. User creates Bidding Period

The time-off bidding process flow begins with creating a Bidding Period object, specifying time-off request dates/times, setting the Opening date/time and Processing Start/Closing dates/times, and associating it with specific sites within a business unit. The bidding period begins to affect agent requests after the Opening date/time. Preferred, wait-listed time-off requests made before the bidding period is opened are not processed until bidding period processing ends. Then, they are all processed on a first come, first served basis.

2. Agents enter time-off requests

After the Opening date/time, new time-off requests become preferred, wait-listed. WFM begins pooling these requests for future processing. Agents should be encouraged to enter their most preferred time-off choice, even if they don't know whether or not it will be granted. The automatic bidding process works most efficiently when the most preferred time-off choice is in the request pool, because it does not have to stop to allow the agent to make another time-off choice.

After entering their first choice, agents set their bidding status to Ready, enabling bidding process to consider the request at the appropriate time. If agents are not participating in the bidding and not requesting time-off, they must still set their bidding status to Ready. If they do nothing, their status is Entering, which prompts the automatic process to stop and wait for time-off requests.

3. Automatic bid assignment process runs. Agents modify their time off choices, if necessary

At the specified Processing Start date/time, WFM begins attempts to grant agent time-off requests, considering agents one-by-one in the predefined order. If all of the preferred, wait-listed time-off requests within the bidding period can be granted, WFM changes the agent's bidding status to Granted. WFM sends an email notification to the agent, indicating that the requests have been granted and then, moves on to the next agent.

If WFM cannot grant any of the agent's preferred, wait-listed requests within the bidding period, it estimates a timeout interval, enabling the agent to change his/her time-off requests to comply with time-off limits. WFM sets the agent status to Waiting and emails a notification to the agent, indicating the timeout interval in which the agent can update his/her request. WFM does not process lower-ranking agents, based on the bidding criteria, until:

1. The current agent changes his/her time-off requests and/or signals WFM to proceed, by setting his/her bidding status to Ready.
2. The estimated timeout interval expires and WFM sets the agent bidding status to Timed Out.
3. The supervisor manually skips the agent, by setting his/her bidding status to Skipped.

The bid assignment process restarts between Processing Start date/time and the Closing date/time to process the time-off requests at the configured frequency. If there is nothing to process, (some agents are still in the timeout interval or all agents are processed) the process skips the bidding period until the next iteration.

4. Supervisors can enter new time-off requests or modify existing requests at any time

Supervisors can enter new time-off requests for the agent, change existing requests, or manually grant requests at any time. Also, when the bid assignment process is waiting for the agent to change the time-off request (agent status is **Waiting**), supervisors can manually skip the agent. To adjust the processing order, supervisors can set the agent's status to **Ready** or **Skipped** at any time, indicating that the bidding process should consider, or not consider the agent for bidding.

When the agent's status is **Skipped**, the bid assignment process moves on to the next agent in the next iteration.

If the supervisor sets the **Wait-listed** option to the preferred time-off item they created and if it is within the time-off bidding period, then the bidding process handles this request as if the agent is bidding. If this time-off item is not within the time-off bidding period, then the **Wait-listed** option will not be saved.

5. Agents can enter new requests at any time

Agents can enter new time-off requests at any time between the Opening date/time and Closing date/time, even if the bid assignment process has started and WFM has already processed the agent's existing requests. The new requests are set to preferred, wait-listed, like all other requests that are pooled for bidding. After entering the new requests, agents must change their bidding status to **Ready**. The bid assignment process considers the new requests, based on the bidding period criteria. If there are time-off requests that are already granted to lower-ranked agents, based on the bidding period criteria, those requests are not revoked. However, the agent's new preferred, wait-listed requests are considered ahead of other lower-ranking agents who still have time-off requests that have not been granted.

Time-off balances

Bidding time-off items display as regular time-off items and reduce the agent's time-off balance for the specific time-off type.

Wait list processing

Wait-listed items are not processed within bidding periods that are not yet processed. If there are no configured bidding periods or a bidding period for the date of the wait-listed item is already processed, the entire request is wait-listed. In previous releases, WFM wait-listed items one by one.

WFM generates a warning when the time-off limit has been reached.

Time-off limits

Time-off limits can be changed during an active bidding period, but do not take effect until the Processing Start date/time for that period. The bidding period implies that time-off limits are set to 0

and time-off requests are not granted. If there is no configured bidding period for a certain date, time-off limits work as in previous WFM releases.

Time-off limits in the Agents interface

This is how time-off limits appear in the Web for Agents interface: If agents are requesting time-off within an open bidding period, only Granted time off will be counted and displayed in their Time Off view.

Initially, when bidding period opens and agents begin to request time off, they will see all open time-off slots according to time-off limits, irregardless of how many agents have preferred a particular time slot. When bid processing starts and WFM begins granting requests, the agents begin to see slots being taken. When the automatic bid assignments process pauses and the agent status is **Waiting**, the agent will see slots available for him/her.