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Workforce Management Agent Help

Managing your schedule bid assignments

11/3/2024

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- Agent

Manage your schedule bids by moving them between the **Desired** or **Unwanted** lists, or removing them altogether.

Related documentation:

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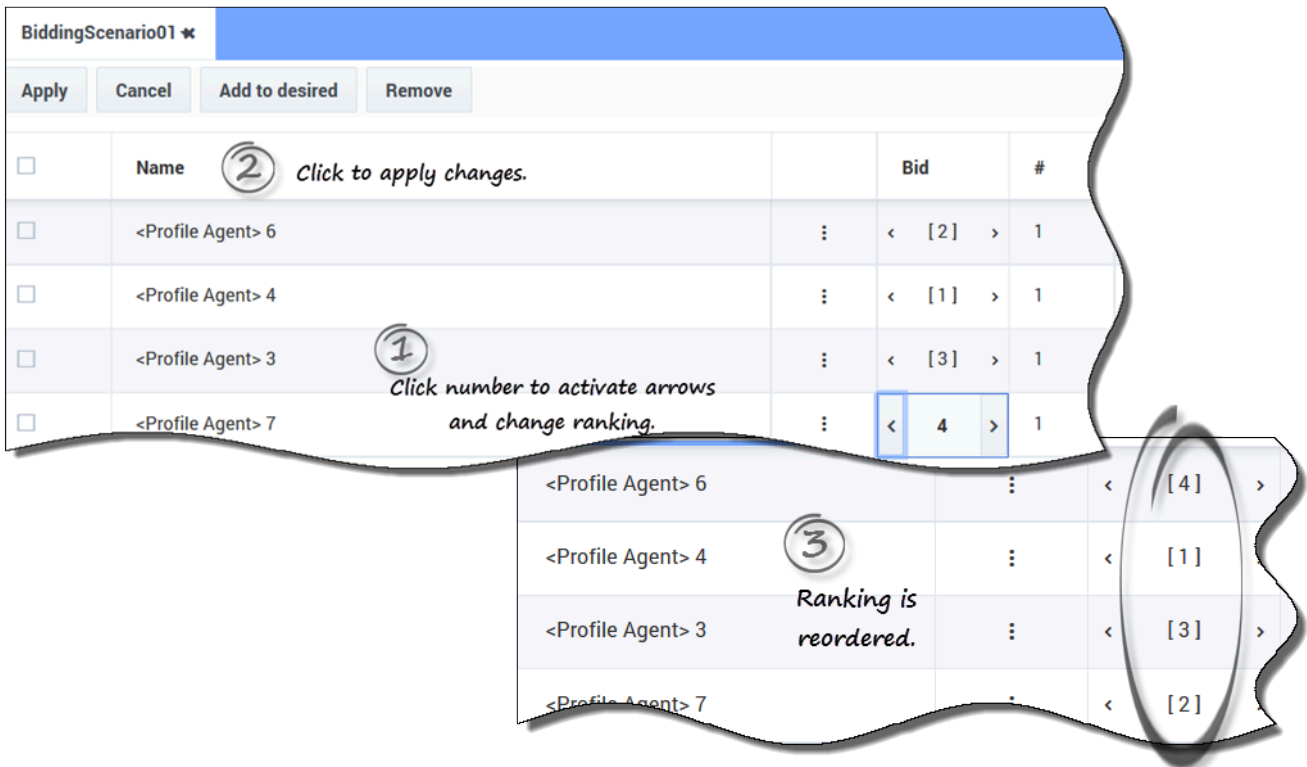
After entering your bids, if you want to change them for schedules you marked as **Desired** or **Unwanted**, you can do so by using the drop-down list (beside the **Filter** icon) in the scenario. After selecting **Desired** or **Unwanted** in the list, you can also change the bid rankings, if necessary.

As an agent, you can only access a bidding scenario for a specific period of time, which is known as the *bidding window*. The bidding window closes on the date and time that is shown in the **Bidding end time** column for each scenario in the **Scenarios** view. To change your bids and/or reorder the ranking, you will have to do it before the **Bidding end time** expires.



Hover your mouse over the **Scenario name** and click the link to open a scenario for which you have entered bids. This is where you manage your existing bids and reorder their ranking, if necessary.

Changing bid rankings

Your bids are already ranked when you reach this view; that happened when you clicked **Add to Desired** or **Add to Unwanted** in the scenario. Your most desired bid is numbered 1 and your most unwanted bid is [1].



To change a single bid in an open scenario:

1. Click the **All** drop-down arrow (near the **Filter** icon) to select the list you want to change: **Desired** or **Unwanted**.
2. In the **Bid** column, click the number in the row for the schedule that you want to change.
The back  and forward  arrows become active.
3. Click the arrows to select the new ranking for this schedule.
4. Click **Apply**.
WFM changes the numbers for the rest of your bids accordingly.
5. Repeat as necessary to achieve the bid order that you want.

Moving bids to another list

In an open Scenario view, use the **All** drop-down list (next to the **Filter** icon) or the icon in the **Actions** column to move your bids for schedules from the Desired list to the Unwanted list, or from the Unwanted list to the Desired list. You can move bids in two ways:

Using Action button

BiddingScenario01

Apply Cancel Add to desired Remove

Choose the list. 1

Unwanted
All
Desired
Unwanted

| | Name | Bid | # | Dates | Paid hours |
|-------------------------------------|-------------------|-----------|---|---------------|------------|
| <input type="checkbox"/> | <Profile Agent> 6 | : < [4] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input type="checkbox"/> | <Profile Agent> 4 | : < [1] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input checked="" type="checkbox"/> | <Profile Agent> 3 | : < [3] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input type="checkbox"/> | <Profile Agent> 7 | : < [2] > | 1 | 4/2/17-4/8/17 | > 50:00 |

2 Select schedule.

3 Click Action button.

Using Actions drop-down menu

BiddingScenario01

Apply Cancel Add to desired Remove

Choose the list. 1

Unwanted

| | Name | Bid | # | Dates | Paid hours |
|-------------------------------------|-------------------|-----------|---|---------------|------------|
| <input checked="" type="checkbox"/> | <Profile Agent> 6 | : < [4] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input type="checkbox"/> | <Profile Agent> 4 | : < [1] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input checked="" type="checkbox"/> | <Profile Agent> 3 | : < [3] > | 1 | 4/2/17-4/8/17 | > 50:00 |
| <input type="checkbox"/> | <Profile Agent> 7 | : < [2] > | 1 | 4/2/17-4/8/17 | > 50:00 |

2 Click Actions icon to open drop-down menu.


3 Select an action from the list.

+ Add to desired
- Add to unwanted
x Remove

- By using the action buttons:

1. In an open scenario, click the down arrow in the drop-down list to select the either **Desired** or **Unwanted**.
2. Select the check box in the far-left column for every schedule that you want to move to another list.
3. Click **Add to desired** or **Add to unwanted**, depending on which list you selected in step 1. **The remaining bids in this list are reordered, accordingly.**

- By using the **Actions** icon:


1. In the open scenario, click **Actions**  icon in the row for the schedule you want to change.
2. When the drop-down list opens, select **Add to desired** or **Add to unwanted**, depending on which list you selected in step 1. **The remaining bids in this list are reordered, accordingly.**

Removing schedules from a list

You can remove one or more schedules from a list in two ways:

Tip

See the graphics in [Moving bids to another list](#), as the steps in these two methods are similar.

- By using the action button:
 1. Click the **All** drop-down list to select the list you want to change: **Desired** or **Unwanted**.
 2. Select the check box in the far-left column for every schedule that you want to remove from the list.
 3. Click **Remove** to remove the selected schedule(s).
This action sets the bid ranking for the schedule(s) to 0 and reorders the remaining bids in this list, accordingly.
- By using the **Actions** icon:
 1. In the open scenario, click **Actions**  icon in the row for the schedule you want to change.
 2. When the drop-down list opens, select **Remove**.
The schedule is removed from the list and remaining bids are reordered, accordingly.