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Workforce Management Web for Supervisors (Classic) Help

Configuring Bidding Periods

Contents

- 1 Managing bidding periods
 - 1.1 Creating bidding periods
 - 1.2 Copying bidding periods
 - 1.3 Deleting bidding periods
 - 1.4 Suspending bidding periods
- 2 Bidding period properties
 - 2.1 Properties controls
- 3 Agent statuses in the bidding period
 - 3.1 How statuses affect requests
 - 3.2 Changing agents' statuses
 - 3.3 Viewing agents' time-off details
- 4 Associating sites and multi-site activities
 - 4.1 Associating sites with bidding periods
 - 4.2 Removing sites from bidding periods
 - 4.3 Associating multi-site activities with bidding periods
 - 4.4 Removing a multi-site activity from a bidding period



- Supervisor

Enable agents to bid for time off within a specified period.

Related documentation:

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Managing bidding periods

Create time-off bidding periods to automate the processing of time-off requests from agents within specified sites who are working on specified multi-site activities (MSA). For more information, see Time-Off Bidding.

Use the procedures and information in this topic to create, copy, delete, and suspend bidding periods.

Creating bidding periods

To create and configure a bidding period:

1. Select **Configuration > Time-Off Bidding Periods**.
2. Select a site within a business unit and click **New**  .
The **Properties** pane opens.
3. Set the bidding period Properties.
4. Associate sites with this bidding period.
5. Click **Save Now**  .

Tip



You can create bidding periods for the same site that overlap within the Start date/time and End date/time, but the time period between the Opening date/time and Closing date/time must not overlap or intersect.

Copying bidding periods

If you want to create another bidding period, using the properties similar to an existing one, create a


new bidding period by copying an existing one and then, make the necessary changes.

To copy a bidding period:

1. Select a bidding period in the list and click **Copy**  .
The hierarchy of business units and sites within the enterprise is displayed.
2. In the **Name** field, enter a name for this bidding period.
3. Change the opening, processing, start, and end date/time settings, as necessary.
4. Select the site(s) that you want to associate with this bidding period and click **Save Now**  .

Deleting bidding periods

To delete a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to delete.
2. Click **Delete**  .
3. When the **Confirmation** dialog opens, select **Yes** to delete the selected bidding period or **No** to cancel the action.

Suspending bidding periods

You can temporarily suspend the bid assignment process for the bidding period by checking **Do not process this bidding period** check box in the Properties pane. When checked, time-off requests for the bidding period are not processed. When the check box is cleared, the bid processing resumes processing where it stopped.

If the current date and time is before the Processing Start date/time or past the End date/time, processing is not resumed.


Bidding period properties

When you create new bidding periods you must then configure the properties. It is important that you understand the impact of these settings on the bid assignment process, especially when setting the various date and time properties for multiple bidding periods.

Properties controls

You'll find the following controls in this pane:

Control	Description
Name	The name of the bidding period.

Control	Description
Multi-Site Activity 	Opens a list of multi-site activities (MSA), enabling you to associate one with a time-off bidding period. After the MSA is associated with a bidding period, agents who can perform the MSA are able to bid for time-off within that bidding period.
Opening Date and Time	<p>The date and time that the bidding period rules begin to apply to the agent's time-off requests, and the process begins pooling the requests.</p> <p>Agents cannot submit requests for the bidding period before the Opening date/time. However, they can submit requests for any other bidding period configured for the same interval, if it is submitted after the Opening date/time and before the Closing date/time.</p>
Processing Start Date and Time	The date and time that this bidding period will start process time-off requests.
Closing Date and Time	<p>The date and time that this bidding period will finish processing time-off requests.</p> <p>The bid assignment process runs multiple times between the Processing Start date/time and the Closing date/time, processing the time-off requests begin pooling on the Opening date/time.</p>
Start date and time	The date and time that this bidding period interval for time-off requests starts.
End date and time	<p>The date and time that this bidding period interval for time-off requests ends.</p> <p>The Start date/time and End date/time properties dictate the interval for time-off requests that are affected by the rules of this bidding period. When setting these dates/time, there are a couple of scenarios, of which you should be aware:</p> <ul style="list-style-type: none"> • Multiple bidding periods configured for the same interval—If you are configuring multiple bidding periods with the same Start dates/times and End dates/times, ensure that the interval between the Opening date/time and the Closing date/time do not intersect or overlap. • Crossing boundaries of the interval—The dates of all concurrent time-off requests must be either inside or outside of the Start date/time and End date/time interval. If agents request time off for dates that cross the bidding period boundary, they must submit separate requests, with each request inside or outside of the Start date/time and End date/time interval. When agents submit cross-interval requests, WFM rejects them.

Control	Description
Time zone <i>drop-down list</i>	The time zone that will be used for the dates and times set for this bidding period. You can choose the business unit time zone, if desired.
Allowed Agent Timeout	<p>When the agent is in Waiting status, the time interval (in hours and minutes) in which the agent will be allowed to change their time-off requests to comply with time-off limits.</p> <p>If the bid assignment process finds an agent whose time-off preferences it cannot grant, it waits for the time interval specified in this property before moving on to the next agent. However, if an agent is unavailable for the entire waiting period, the bid assignment process does not count the unavailable time. The available time is determined by the agent's schedule or if the schedule is not available, his/her Contract.</p>
Maximum number of weeks that can be requested	The maximum number of weeks that the agent can request for the entire bidding period within multiple requests.
Maximum number of days that can be requested	The maximum number of days that the agent can request for the entire bidding period within multiple requests.
Maximum number of hours that can be requested	<p>The maximum number of hours that the agent can request for the entire bidding period within multiple requests.</p> <p>The default value is 0 for the Maximum number of that can be requested, indicating that this constraint is not observed for this bidding period.</p> <p>Only time-off requests made after the bidding period opening date/time are counted against the Maximum number of settings.</p>
Minimum consecutive days	<p>The minimum number of consecutive days that the agent can include in a single request.</p> <p>This property defines the required number of combined day-off and time-off requests for a single request. If agents have days off defined by their Contract, granted Calendar days off, or Rotating Pattern days off, then they are counted in the Minimum consecutive days parameter. In other words, agents do not have to request time off for known days off.</p>
Allow full-day time-off requests only <i>check box</i>	When checked, agents can request only full-day time off (cannot request part-day time off).
Criteria <i>radio buttons</i>	<p>The 4 available priorities for this bidding period; Rank, Seniority, Seniority and Rank, or First come, first serve.</p> <p>Requests will be granted, declined, or wait-listed, based on the selected priority.</p>


Control	Description
	If the sorting criteria is set to First come, first serve , the timestamp is taken from the last date/time that the agent changed his/her bidding status to Ready , (not the date/time that the request was submitted).
Do not process this time-off bidding period. (It will be automatically checked by system after it was processed) <i>check box</i>	Enables you to suspend the bid assignment process if, for any reason, you need to temporarily suspend it, or if you do not want the bidding period to be processed for any reason. Be sure to save the Properties settings if you check this box for an existing bidding period.
Message to agents	Enables you to add any message that you feel is relevant to the agent about this bidding period.

Agent statuses in the bidding period

View agents' statuses in the time-off bidding process and learn how they affect request processing.

The **Status** pane in the **Time-Off Bidding** view lists agents that have submitted requests within the bidding period and sorts them in the order that they will be processed for bid assignment. You can use the **Status** pane to manually change an agent's status when managing agent time-off requests within bidding periods.

Information about agent statuses is displayed in the following columns:

- **Actions**  —Clicking this icon opens the agent's time-off details in a separate window.
- **Order**—Indicates the agent's place in the bid assignment processing queue.
- **Agents**—The agent's first and last name.
- **Status**—The agent's status; **Entering**, **Skipped**, **Ready**, **Waiting**, **Processed**, or **Timed Out**. See How statuses affect requests.
- **Modified**—The date and time that the agent's current status was changed.
- **Waiting End Date**—The date that waiting period ends for this agent's request changes, and when the bid assignment moves on to the next agent in the queue.
- **Site**—The agent's site name.
- **Team**—The agent's team name.

How statuses affect requests

The agent's status determines when and how their time-off requests are processed for bid assignment. For example, these statuses can be selected in the Status drop-down list:

- **Entering**—The initial (default) status assigned to the agent, indicating that the agent can enter time-off requests to be added to the bidding period queue. Agents and supervisors can set this status any time

agents want to change their requests. During bid processing, WFM sets the bid assignment status to **Waiting** and sends the agent an email notification.

- **Ready**—Usually set by agent, indicating that time-off requests were submitted and are ready for processing. Agents and supervisors can set this status at any time. WFM processes the requests and sets the request status either **Processed** or **Waiting**, depending on the bid assignment rules or constraints.
- **Skipped**—Supervisors can manually set this status at any time, indicating that bid assignment process should not consider the agent's requests. WFM ignores the agent's requests during the bid assignment process.

The following statuses are set by the bid assignment process; neither supervisors nor agents can set them:

- **Waiting**—Set when the bid assignment process cannot grant all requests. It indicates that the process is waiting for the agent to enter or change his/her time-off requests. Once the waiting period is over (the date is displayed in the **Waiting End Date** column) or the process finds that all changed requests can be granted, it resumes processing.
- **Processed**—Set when all of the agent's requests have been successfully granted, or the agent has not submitted any requests. The process also checks for items that might have already been granted.
- **Timed Out**—Set when the time allotted to the agent to edit or enter time-off requests has expired. At this point, the process moves on to the next agent.

Tip

Bidding periods created before migration to the latest 8.5.2 release, will have no saved agent status records. Therefore, agents statuses will default to **Entering**, but you can change them after migration to conform to the new rules. If you make no changes to the bidding period properties after migration, the *old* bidding period functions.

Changing agents' statuses


To change an agent's status:

1. Click the **Status** tab.
2. In the **Status** column (of the agent whose status you want to change), click the drop-down list to select **Entering**, **Ready**, **Processed**, or **Skipped**.


3. Click **Save** .

The Modified column displays the date and time of the change.

Viewing agents' time-off details


1. Click the **Status** tab.
2. Find the agent whose details you want to view and in the first column, click **Actions** .

The agent's time-off details open in a separate window.

3. Optionally, click **Sort**  and select **Date, Item, Start Time, End Time, Paid Hours, Status Requested, Status Actual**.

What's in the Details?

The **Time-Off Details** window includes:

- The agent's name
- The period or date range within which time-off requests were made (matches the Start and End dates that you entered in Bidding Period Properties)
- A table containing detailed information in the following columns: **Date, Item, Start Time, End Time, Paid Hours, Status Requested, Status Actual**
- A **Sort**  icon, enabling you to sort by date, item, start time, end time, paid hours, status requested, or status actual.


Associating sites and multi-site activities

Associate sites and multi-site activities with bidding periods to enable agents (at these sites and/or working on these activities) to view and participate in time-off Bidding offers.

Workforce Management enables you to choose the way in which you associate agents with bidding periods. In most cases, associating agents by using sites is acceptable. However, you might want to achieve a more granular approach to time-off bidding by associating agents using multi-site activities (MSA).


Associating sites with bidding periods

To associate one or more sites with a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to associate with a site.
2. Click **Sites** and then, enter a check mark beside one or more sites.
3. Click **Save Now**  .

Removing sites from bidding periods

To remove a site from a bidding period:

1. Remove the check mark beside the site that you want to remove.
2. Click **Save Now**  .



Associating multi-site activities with bidding periods

When associating a multi-site activity with a bidding period, it's best to use an MSA with configured time-off limits on which agents can bid. However, you can use multi-site activities only for agent association, if you wish.

Tip


To ensure all agents associated with the MSA are assigned to the bidding period, select all sites (in the procedure above).



To associate a multi-site activity with a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to associate with a multi-site activity.
2. In the Properties pane, beside the Multi-Site Activity field, click **Edit**  .
A list of Multi-Site Activities opens in a separate pane.
3. Select an MSA and then, click **Apply**  .
The MSA appears in the MSA field in the Properties pane.

Removing a multi-site activity from a bidding period

To remove a a multi-site activity from a bidding period:

1. In the Properties pane, click the **x** in the Multi-Site Activity field.
The MSA is removed and the field is empty.
2. If you want to choose another MSA without removing the existing one, simply select another MSA from the list and click **Apply**  .
Your latest selection replaces the existing one in the MSA field.

If there is a long list of MSAs, use **Sort**  to switch between ascending descending order, or enter the name of the MSA you want to use into the **Search**  field.