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Workforce Management Web for Supervisors (Classic) Help

Overtime Bidding

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Learn how using Overtime Offers that enable agents to bid on the overtime hours they most prefer can help with meeting your overtime requirements.

Related documentation:

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How overtime bidding works

Complete these steps to set up WFM Overtime Offers and initiate the bidding process. Click the links in the summary steps below, to read details.

1. Obtain user role privileges

Ensure that an administrator (or someone with administration privileges) has given you the proper role privilege, enabling you to access Overtime Bidding. See [Assigning roles to users](#) and [Schedule Role Privileges](#).

2. Create an overtime offer

Create the overtime offer and sets its properties.

3. Open the offer for bidding

Open the offer for bidding, making it visible in the WFM Web for Agents interface. You can edit the Overtime Offer at any time.

4. Wait for agents to submit bids

Wait for agents who are associated with (can see) the Overtime Offer to submit their requests for overtime slots, including the desired start and end time for each slot. Agents can enter multiple bids within the same Overtime Offer, setting the preferred priority for each slot. Agent can enter overlapping time intervals or slots.

5. Initiate the overtime scheduling process

Start the overtime scheduling process; at the top of the **Overtime Offers** pane, click **Initiate scheduling process**.

WFM processes bids for overtime scheduling

WFM begins the overtime scheduling process, using the associated agents list to select agents one-

by-one, based on ranking order, and processing their overtime requests, based on the priority specified by the agent.

WFM schedules the slot if:

- The requested overtime is under the overtime requirement for activities associated with the Overtime Offer.
- Rules and constraints configured within Overtime Offer are satisfied
- Agents receive valid schedules based on existing constraints, meaning they do not generate schedule warnings.

After WFM finishes the overtime scheduling process, agents' schedule are committed to the Master Schedule.

Overtime offer properties

You'll find the following settings and controls in the **Overtime Offers Properties** pane:

- **Name**—Enter a name for the overtime offer. The name must be unique in the Configuration database.
- **Start Date and Time**—Enter the start date and time for the overtime offer. This is the earliest date/time for which agents can submit bids for overtime.
End Date and Time—Enter the end date and time for the overtime offer. This is the latest date/time for which agents can submit bids for overtime.
Create Overtime Offers that are less than 6 weeks only. WFM does not process or save offers that exceed 6 weeks.
- **Criteria**—Select the criteria that WFM will use to prioritize the processing of agents' bids. For example:
 - Rank
 - Seniority
 - Seniority and Rank
 - First come, first serve
- **This Overtime Offer is open** *check box*—Check this box to open the overtime offer and make it visible to agents. You can save the offer without checking this box and check it later when you are ready to open the offer.

ASSIGNS section:

- **Activity/Multi-Site Activity**—Use the radio buttons to select an activity or multi-site activity that agents will work on during the hours of the overtime offer. Click **Edit**  to open a list of activities or multi-site activities, select one, and click **Apply** . Click the **x** on an existing activity/multi-site activity to clear this field.
- **Marked Time** *drop-down list*—Select the Marked Time that will identify the assigned overtime activity/multi-site activity in schedules.

RULES AND CONSTRAINTS section—Enter values in the format hh:mm in this section:

- **Minimum slot size**—The minimum slot size of any one agent bid.
- **Maximum slot size**—The maximum slot size of any one agent bid.
- **Maximum agent overtime per day**—The maximum amount of overtime per day that a single agent can work.
- **Maximum total overtime per day**—The maximum total amount of overtime per day that all agents can work.
- **Maximum total agent overtime**—The maximum amount of overtime that a single agent can work.
- **Maximum total overtime**—The maximum total amount of overtime that all agents can work.

COMMENTS section—Enter any relevant comments or details about the Overtime Offer.

Managing overtime offers

Use the information to configure and manage Overtime offers and initiate overtime scheduling.

At any given time, you might have more than one Overtime Offer open or in progress. WFM helps you to manage Overtime offers by providing intuitive controls and views that enable you to perform the following tasks:

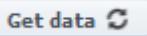
- Create, delete, or copy offers.
- Associate agents and sites with offers.
- Disassociate or remove agents and sites from offers.
- View bid slots for selected agents and decline bid requests.
- Initiate the overtime scheduling process.
- Edit the **Properties**, **Agents**, and **Sites** settings for a selected offer by clicking the tab, making the necessary changes and then, saving them.

Creating overtime offers

Create Overtime Offers that are less than 6 weeks only. WFM displays a validation error if an offer exceeds 6 weeks and does not save it.

To create an overtime offer:

[Link to video](#)

1. Go to **Schedule > Overtime Bidding**.
2. In the **Objects** pane, select a business unit or a site and then, click .
3. In the **Overtime Offers** pane, click **New** . **The Overtime Offer Properties pane opens.**
4. Enter a name for the Overtime Offer.
By default, the Name field is already populated with a name when you select New. The

name includes a number to ensure that each newly created Overtime Offer has a unique name in the Configuration database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.

5. Continue setting the properties as described in Overtime offer properties.

6. When finished, click **Save** .

Tip

If the list of Overtime Offers becomes long, find offers quickly by entering criteria into

the **Search**  field, or by using clicking **Sort**  and selecting one of three columns to sort on: **Name**, **Start**, **End**. Alternatively, sort any of these columns in ascending or descending order, by clicking the column header.

After you save the Overtime Offer, WFM displays the **Agents** tab, enabling you to associate agents with this offer. Also, use the **Sites** tab to associate sites with this offer.

Using copy to create offers

To create an overtime offer by copying an existing offer:

1. In the **Overtime Offers** pane, select the offer you want to copy. **The Associate**
2. Select the Business Unit that you want to associate with this offer and click **Apply** .
3. Rename the offer and change any other property settings, as required. **The Overtime Offer name must be unique in the Configuration database.**
4. Click **Save** .

Deleting offers

To delete an overtime offer:

1. In the **Overtime Offers** pane, select the offer you want to delete.
2. Click **Delete** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the offer, or **No** to cancel the action.

Associating agents with offers

You can associate agents in two ways: By selecting all agents skilled in the activity you specified for this Overtime Offer or by choosing agents from a list. Note that the controls used to add and remove agents from a list are not visible when you select the option **Use all agents skilled for the selected activity**.

To associate agents with an overtime offer:

1. Click the **Agents** tab.
2. Check the **Use all agents skilled for the selected activity** check box.
The Agents section of the pane is populated only with agents who are skilled in the specified activity. WFM selects these agents automatically.
3. Optionally, click **Add Agents**  to select agents from a list.
The Available Agents pane opens these columns
(the agents') **Last name**, **First name**, **Site**, and **Team**.
4. Select the agents you want to associate with the Overtime Offer and click **Assign and save** .

This procedure is also demonstrated in the video Create Overtime Offer, above.

Finding and sorting agents

If the list of agents on the **Agents** tab or in the **Available Agents** pane becomes long, find agents quickly by clicking **Sort** :

- Select one of three columns to sort on the **Agents** tab: **First name**, **Last name**, **Site**.
- Select one of four columns to sort in the **Available Agents** pane: **First name**, **Last name**, **Site**, **Team**.

You can also use **Search** to find agents in long lists by clicking the **First name** or **Last name** radio buttons and then, entering the agent's name, or enter other search criteria

Removing agents from offers

To remove agents associated with an overtime offer:

1. In the **Agents** tab, click the row of the agent that you want to remove.
2. Click **Remove agents** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the agent, or **No** to cancel the action.

Viewing bid slots for agents

To view bid slot for an agent:

- In the **Agents** tab, click the row of the agent whose bid slots you want to see. The **Bid Slots** pane opens, showing bid information for the selected agent in four columns
 - **Bid** (priority)
 - **Start** (date/time)
 - **End** (date/time)
 - **Status** (of the bid)

Declining bid requests

To decline an agent's bid request:

1. Click the **Agents** tab and select the agent whose bids you want to view and decline.
The Bid Slots pane opens displaying a list of the agent's bid requests.
2. Select the row containing the bid you want to decline.
The Bid Slot Details pane opens with the following information:
 - **The schedule date (on which agents insert bid slots)**
 - **The bid slot start date and time**
 - **The bid slot end date and time**
 - **The priority number**
 - **The status**
 - **The reason (or warnings that appear when agents insert bid slots or during processing)**
 - **The comments associated with the bid slot**
3. Click **Decline**
4. In the **Confirmation** dialog that opens, click Yes to proceed or No to cancel the action.
If you select Yes, the status in the Bid Slots pane changes to Declined.
5. To continue with another bid slot or another agent, click **Close**

Associating sites with offers

To associate sites with an overtime offer:

1. Click the **Sites** tab.
2. Check the sites that you want to associate with the offer.
If you want to select all sites, select the top check box named Site.

This procedure is also demonstrated in the video Create Overtime Offer, above.

Removing sites from offers

To remove sites from an overtime offer:

1. In the **Sites** tab, clear the check box beside the site(s) you want to remove or disassociate from the offer.
2. Click **Save** .

Initiating the overtime scheduling

To start the overtime scheduling process:

1. At the top of the **Overtime Offers** pane, click **Initiate scheduling process** .
2. When the **Confirmation** dialog opens, click **Yes** to begin the scheduling process or **No** to cancel the action.
If you select Yes, a Processing dialog opens with a progress bar indicating that WFM is processing the agents' requests.

After WFM processes all agents' requests for overtime and schedules them, the Overtime offer is closed and WFM clears the check box **This Overtime Offer is open**. Agents who submitted requests will see them as **Resolved** in the Web for Agents UI and the Overtime offer status as **Closed**.

Continuous processing of overtime offers

You can enable WFM to continuously process Overtime Offers, which have FIFO selected for agent bid ranking criteria. Continuous, automatic processing is enabled by setting a configuration option in the WFM Server application, which specifies the time interval between overtime bidding processes. When enabled, there's no need to manually initiate the scheduling process, as Overtime Offers stay open and WFM does not automatically clear the **This Overtime Offer is open** check box to close the offer (as it does when the process is manually initiated).