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Workforce Management Web for Supervisors (Classic) Help

[Schedule Bidding](#)

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Learn how to create schedule bidding scenarios that contain no agent names, and distribute those schedules to agents, enabling them to rank and bid on their most desired and least desired schedules.

Related documentation:

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WFM's Schedule Bidding feature enables workforce planners to create and distribute schedules via the Web, enabling agents to bid on their most desired ones.

Schedule Bidding enables contact centers to comply with certain labor union regulations that require that the most senior agents, or the most highly-ranked agents, get the schedules they most desire. Even if your contact center does not have these labor regulations, it may still be a process that could provide business value to you. It is a way to empower agents to have more input into the schedules they will be given, and therefore could be used to increase morale within the contact center and reward high-performing agents.

How schedule bidding works

Instead of simply assigning schedules to agents, the Supervisor designs and builds a schedule scenario. Then, agents can view the scenario and enter bids for their most desired, and most unwanted, shifts. Finally, the Supervisor can auto-assign or manually assign schedules to agents based on their bids, using a hierarchy system of seniority or rank.

Click links in the summary steps below, to read details.

1: Set up bidding

- Someone with administration permissions must verify that **Schedule Bidding** is enabled. Ask your Genesys Professional Services representative for assistance with this.
- The Supervisor creates and configures a bidding scenario. Steps include creating a forecast and then a schedule for specific activities and profile agents, then deciding which agents can bid and when.

This opens the bidding process and makes the schedule options visible to agents.

Important

During the **Schedule Bidding** period, a scenario's site has the status **Open for Bidding**. Any action or operation that would alter schedules for that site is disabled. This includes (but is not limited to) these actions: direct schedule editing, insertions or deletions, clean up or extraction from the **Master Schedule**, schedule rebuild or optimization.

2: Bid on the schedule

- a. Agents examine the bidding scenario options and submit their bids.
- b. The bidding period closes when the bidding end date arrives. Agents can not access the closed bidding scenario.

3: Resolve bids

- a. The Supervisor reviews schedule bids. The Supervisor might want to manually modify or assign schedules to agents.
- b. The Supervisor starts the auto-assignment wizard. The wizard assigns schedules to agents.
- c. The Supervisor reviews results of auto-assignment. The Supervisor might want to manually modify or reassign schedules.

4: Finalize the schedule

- a. The Supervisor publishes the bidding scenario to the **Master Schedule**.
- b. After all schedules have been assigned to real agents, the Supervisor can run a Schedule Bidding Report.

How the auto-assignment works

It's important to understand how WFM's schedule bidding Auto-Assignment Wizard works, otherwise, it might appear that agent rankings for granting bids is incorrect in some cases.

The wizard's algorithm makes two passes through all bids. Here's how it works:

1. The wizard first processes Desired bids only for all agents (higher ranking agents first).
2. The wizard then processes agents without assigned schedules—agents whose Desired bids were not granted or agents who have no Desired bids—taking into account Undesired bids for shifts that were not assigned previously as Desired for any agent.

Shifts in Undesired bids can be taken by agents who entered them as Desired bids. The worst case scenario occurs when an agent who has no assigned schedule finds all of his/her Desired bids granted to another agent with a higher rank who bid Desired on the same shifts, and all of his/her Undesired or neutral bids granted to other agents with a lower rank who bid Desired on those same shifts.

Configuring bidding scenarios

Begin at the Schedule Scenarios view.

1. Create a forecast scenario

1. Create a forecast scenario.
2. Define the work week(s) that this forecast spans and the activities that it requires.

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3. Build volumes, build staffing, and then publish the forecast.
This transfers the forecast to the master schedule database, so you can configure a bidding schedule.
 4. Follow all the steps exactly as you would to create a non-bidding schedule.

2. Create a schedule scenario

1. Create a schedule scenario.
2. Define the general parameters including **Start Date**, **End Date** and extended end date.
For example, you can build a 1-week bidding schedule the Start Date 3 June 2007, and the End Date 9 June 2007, and the Extended End Date is 1 September 2007. The one-week schedule that you present to agents for bidding, is applicable for the entire 3rd quarter of 2007. Agents can see the Extended End Date during bidding, and thus know that they are bidding on schedules for the entire 3rd quarter.
3. Select activities, and agent profiles.
You can select real agents too, but their schedules will not be biddable.
4. Build the scenario .

3. Configure the scenario for bidding

1. Build the Bidding Schedule.
2. Define *which* agents can bid in the Bidding Candidates Selection dialog.
3. Define *when* agents can bid in the Control Bidding Process wizard.


Selecting bidding candidates

Use the **Bidding Candidates Selection** dialog to specify which agents are eligible to bid on a chosen bidding scenario.

1. Preparation

- a. Create and configure a scenario for bidding.
- b. Open the scenario and select the **Profiles/Bidding** view.

2. Assigning the Agents

- a. To open the wizard, click **Bidding Candidates Selection**  in the toolbar.
- b. In the **Bidding Candidates Selection** dialog, open the **Site(s)** and then the **Team(s)**.
- c. Select only the team members who will be eligible to bid on your configured **Scenario**.
- d. Clear the check box to the left of each member who will not be eligible to bid.
- e. Click **OK**.

Associating and separating teams

You reached this wizard by clicking **Associate/Separate Teams**  in the toolbar.

Follow these steps to associate or separate teams:

1. Select one of these two radio buttons:
 - **Associate Teams**—The teams that you select from the **Configured Team** and **Profile Team** drop-down menus will be associated with each other. Profile agents from the profile team will be placed on the configured team.
 - **Separate Into Teams**—Any profiles that are in the team that you select from the **Configured Team** drop-down menu will be separated to a profile team. The **Profile Team** drop-down menu will be disabled.
2. Select a site from the **Sites** drop-down menu.
All sites that are present in the currently selected scenario are listed. Selecting a site refreshes the team lists in this dialog box.
3. Select a team from the **Configured Team** drop-down menu.
All configured teams in the currently selected site are listed, with no default choice. *Configured* means teams created in the **Organization > Sites** module of WFM Web, with real agents assigned.
4. Select a team from the **Profile Team** drop-down menu.
All profile teams that are in the currently selected site are listed, with no default choice. Disabled if the radio button **Separate into Teams** is selected.
5. Click **OK** to perform **Association** (or **Separation**).
Click **Cancel** to abandon it.

Controlling the bidding process

Define start and end dates and times for existing schedule bidding scenarios.


Use the **Control Bidding Process Wizard** to:

- Define the **Schedule Bidding** period (**Bidding Start date/time** and **Bidding End date/time**) for the current bidding scenario.
- End bidding early, or extend bidding, by changing the **Bidding End** value for a bidding scenario that is currently open.

1. Preparation

- a. Create and configure a scenario to be used for bidding.
- b. Open the scenario and select the **Profiles/Bidding** view for that scenario.

2. Running the Wizard

- a. To start the wizard, click **Control Bidding Process**  in the toolbar.
- b. In the **Select Site** dialog, select the appropriate site and click **Next**.
- c. In the **Set Bidding Options** dialog, use these controls to specify the start and end of bidding:

Bidding Start	<p>Specify the bidding start date and time. You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at right to display a calendar.</p> <p>Default value: bidding start date (if bidding was already initiated) or midnight tomorrow (if bidding is not yet initiated).</p>
Bidding End	<p>Specify the bidding end date and time. You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at the right to display a calendar.</p> <p>Default value: bidding end date (if bidding was already initiated) or midnight tomorrow + 1 week (if bidding is not yet initiated).</p>

You can change the **End Date** after the bidding scenario is already open and while agents are bidding. You might have to change the date, either to extend or to shorten the bidding period, for business reasons. But be careful if you do that. The **End Date** is visible to agents as they bid, and they will rely on its accuracy. If you decide to close bidding early (or to extend it), inform all your agents beforehand so they will not be caught by surprise.

- d. Click **Finish**.

Resolving and publishing bidding scenarios

The **Schedule Bidding** period has ended. Eligible agents have bid on their preferred schedules and if each agent requested a different schedule, then the Supervisor could grant everyone's wish. But of course there are conflicts. The Supervisor must resolve identical bids and create a schedule with a real agent assigned to every schedule, while heeding such factors as agent seniority and rank.

Supervisors should follow these steps to resolve the bidding and publish a schedule with real agents:

1. Select the **Schedule** module, open the bidding scenario that needs resolution, and select the **Bidding/Profiles** view.
If necessary, you can end bidding early for a still-open schedule.
2. Examine the agents' bids, and make manual adjustments or assignments as necessary.
3. Run the Auto-Assign Schedules Wizard, to assign real agents to the "profile" schedules automatically.
4. Publish the now-finished bidding schedule to the **Master Schedule**.

The **Publish to Master Schedule** page of the **Publishing Wizard** includes the Insert granted exception, time off, and day off Calendar items check box, which you can use to overlay these items

in the schedule.

Important

Unassigned profile schedules are not published to the **Master Schedule**; only real agents' schedules.

After the bidding scenario is published to the **Master Schedule**, agents can view it when they log in.

The Supervisor can generate a Schedule Bidding Report if all profile schedules were assigned to real agents.

Auto-assigning schedules

You reached this view by clicking **Auto-Assign Schedules**  in the toolbar.

Follow these steps to auto-assign schedules:

1. Select a **site**.
2. Select a ranking system by clicking one of these three radio buttons:
 - **Seniority** favors agents by their hire dates.
 - **Rank** favors agents by their rank, as defined by a supervisor.
 - **Seniority + Rank** favors agents by seniority first, and if that results in a tie, then uses rank as the criterion.
3. Select a target (which agents will be assigned schedules).
All Agents—Auto-assigns from the pool of all agents. Here are two uses for this option
 - You previously prepared profile schedules, not intended for bidding but for 400 new agents that you have now hired, and need to assign.
 - Bidding is resolved but you still need to assign a few profile schedules to real agents.
Bidding Agents Only (default)—Auto-assigns only those agents that were designated as eligible to bid, in the Bidding Candidates Selection dialog.
4. Click **OK** to begin the auto-assignment process or **Cancel** to abandon it.