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Workforce Management Web for Supervisors (Classic) Help

[Scenario Profiles/Bidding View](#)

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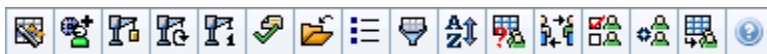
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Assign agents to schedules that you created by using profiles.

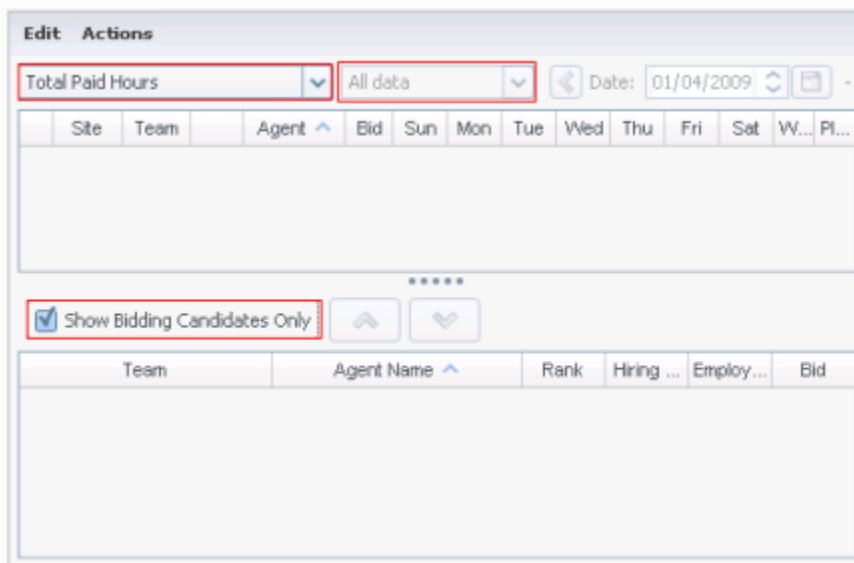
Related documentation:

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The toolbar at the top of the **Scenario Profiles/Bidding** view is shown here. See the button descriptions below.



Bidding controls and tools are described at the bottom of this topic.



Using profile-based scheduling

Use profile-based scheduling in one of two ways :

For bidding scenarios:

WFM offers **Schedule Bidding**. This view offers controls you can use to:

- Assign agents to a bidding scenario before bidding starts.
- Set the start and end dates for bidding.

- Start the auto-assignment process, to assign agents to schedules, after the bidding is closed.

These tools are a key portion of WFM's Schedule Bidding functionality.

For advance planning:

You can use a profile-based schedule to plan for and schedule agents who you have not yet hired.

1. Configure and build your scenario(s) using profiles with the characteristics of your not-yet-hired agents.
2. Once the real agents are on board, assign them to the profile schedules.

Displaying the view

To display the **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
The Schedule Scenarios table appears.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**



The scenario's name appears on the toolbar, as a menu.

To display the open scenario's **Profiles/Bidding** view:

1. From the scenario_name menu on the toolbar, select **Profiles/Bidding**.
2. In the **Objects** pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.


You can expand business units to display their sites and expand sites to display their profiles. You can select multiple sites, teams, and profiles, but just one business unit. You can select or remove all of a site's profiles by selecting or clearing (respectively) the check box beside the site node.

Reading the tables

This view includes two tables, arranged vertically. Each table displays a vertical scroll bar (when required), which you can use to reveal additional rows. You can also give one table additional room by clicking and dragging the divider bar between the two tables.

The upper table displays a list of profile schedules, identified by a contract icon and by an index number (each of which is unique within the scenario). This table has the following columns:

Icons and columns	Description
▲ (line is expanded)	Click this icon to collapse a multiple-line listing to a

	single line.
▾ (line is collapsed)	Click this icon to expand a single-line listing to multiple lines.
Site	The assigned site of the agent in this row. You can show or hide this column using the Options toolbar button.
Team	The assigned team of the agent on this row.
	This icon represents the agent's contract.
Agent	Shows an index.
Bid	The agent's bid ranking number for this schedule. You can show or hide this column using the Options toolbar button.
[Weekdays]	Shows profile schedule information for the specific day. (The cells' contents correspond to your selection in the Show Data for drop-down list.)
Weekly Totals	To the right of each week, the total hours in that week (sum of all days). If there is more than one total, the sum of all totals appears above them.
Planning Period Totals	The total hours of all weeks in the Planning Period .

The lower table displays a list of real agents, with the following columns: **Team, Agent Name, Rank, Hiring Date, Employee ID,** and **Bid**.

Each row displays information for one agent. Each agent listed meets all the requirements imposed by the icon Show Assigned Agents and the check box Show bidding candidates only.

Team	The assigned team of the agent on this row.
Agent name	The name of the agent on this row being documented in this row.
Rank	The agent's rank, if one exists.
Hiring Date	The agent's hiring date.
Employee ID	The agent's employee ID.
Bid	The agent's bid ranking number for this schedule.

Using the tables

To assign a real agent to a profile schedule slot:

1. Click a profile schedule in the upper table.
This populates the lower table with any real agents who are eligible to fill this slot. WFM Web presents agents who share the selected profile's contract, and who have the skills necessary to handle all of the profile's activities.
2. Click a real agent in the lower table.

-
3. Click  .

In the upper table, the real agent's name replaces the selected schedule's index.

To remove an assignment:

1. Click the assigned agent in the upper table.

2. Click  .

A numbered profile replaces the agent's name in the upper table. The agent's name reappears in the lower table.

To remove a profile slot from the upper table:

- In the **Objects** tree, clear that profile's check box.

Show data for

Use this drop-down list to select what you want to display inside each day's table cell:

- **Total Paid Hours**—Total working time for the day. (Default display option.)
- **Working Start/End Time**—Start and end times of agents' work.
- **Shift or Schedule State Names**—Names of agents' assigned shifts.


Mode










Use this drop-down list to select what you want to display in the table:

- **All data**—Displays all profile schedules for the scenario period defined by start date and end date. Includes columns for **Weekly Period Totals** and **Planning Period Totals**.
- **Planning Period**—Displays all profile schedules for the entire planning period. Includes columns for **Weekly Period Totals** and **Planning Period Totals** for each profile schedule.

Using the toolbar

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	Publish	Opens the Scenario Intra-Day: Wizards and Dialogs, where you can publish a portion of the selected scenario to the Master Schedule, or extract a portion of the Master Schedule to the selected scenario.

	Add/Remove schedule elements	Opens the Add/Remove Scenario Elements Wizard, where you can add activities, and add or remove agents, for the current schedule scenario.
	Build schedule	Opens the Schedule Build Wizard, which builds a complete schedule for the selected site.
	Rebuild schedule	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	Rebuild Intra-day schedule	Opens the Intra-Day Schedule Rebuild Wizard, where you can modify and rebuild intra-day schedules.
	Validate schedule	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have already built a schedule for this scenario and saved any warnings that were generated.
	Close	Closes the open scenario (and prompts you to save unsaved data).
	Options	Opens the Bid Options dialog, where you can choose to display or hide these columns in the upper table: Bid , Site .
	Filter	Opens the Schedule Filter dialog, enabling you to filter the displayed contract types and activities.
	Sort	Opens the Sorting dialog, enabling you to sort schedules by Site name , Team Name , Contract , Agent Name (first or last), or Agent Rank . You can then sort agents by First name or Last name , and you can sort the entire list by ascending or descending order. Tip Agent Rank sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.

Bidding scenario tools in this view

Use these controls to assign agents to a bidding scenario before bidding starts; to set the start and end dates for bidding; and to start the auto-assignment process to assign agents to schedules, after bidding is closed.

Icons

Icon	Name	Description
	Select Bidding Candidates	Opens the [[PEC-WFM/Current/Supervisor/SBBdgCndtsSltn]] dialog, where you specify which Agents can bid on the current bidding scenario.
	Control Bidding Process	Opens the [[PEC-WFM/Current/Supervisor/SBCntrlBdgPrcWz]], where you specify the Start and End dates for the current bidding scenario.
	Auto-Assign Schedules	Opens the Auto-Assign Schedules Wizard, where you initiate the auto-assignment process that assigns bid-upon profile schedules to real agents.
	Show assigned agents	Displays real agents and their assigned shifts in the grid, only if the schedule was originally created using agent profiles. Otherwise selecting has no effect.
	Associate/Separate Teams	Opens the Associate/Separate Teams Wizard.


All other icons and modules are described in the Scenario Intra-Day View and the Scenario Agent-Extended View.

Check box


- **Show bidding candidates only**—Controls which agents are listed in the bottom pane. Select this check box to display (in the bottom pane) only agents who can bid on the profile schedule selected in the top pane. Clear this check box to display (in the bottom pane) all agents at the **Site** who qualify for the profile schedule selected in the top pane.
 - When you use this view for schedule bidding, check the check box.
 - When you use this view for profile-based scheduling, clear the check box.

Arrows

Use these arrows to manually assign real agents to profile shifts or to unassign them.

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-  (*up arrow*)—Assigns a real agent to the selected profile shift. To use this function:
 1. Highlight a profile shift in the upper grid.
 2. Highlight a real agent in the eligible list below.
 3. Click the up arrow to assign the real agent to the profile shift.

The profile shift you selected becomes a real agent shift and the real agent disappears from the eligible list below.

-  (*down arrow*)—Unassigns a real agent from the selected shift. To use this function:
 1. Select a real agent shift in the upper grid.
 2. Click the down arrow to unassign the shift.

The shift you selected becomes a profile shift (now available for assignment) and the real agent appears in the eligible list below.

Options dialog

Use the **Options** dialog box to specify the columns that the **Scenario Profiles/Bidding** view displays.

1. On the **Scenario Profiles/Bidding** view's **Actions** toolbar, click the **Options** button.
The Options dialog box opens with all check boxes selected, by default.
2. Clear the check boxes for the items that you want excluded from the display.
3. Click **OK** to apply your choices.