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Workforce Management Web for Supervisors (Classic) Help

Time-Off Bidding

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Get an overview of how WFM automates time-off bidding requests and assignments, and learn how to configure time-off bidding periods.

Related documentation:

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Enable WFM's time-off bidding feature by creating and configuring *bidding periods* and associating them with a site and multi-site activity (MSA). Once configured, agents who are within the site and assigned the MSA can submit multiple, concurrent time-off requests within the bidding period. WFM processes the requests between the specified processing start date/time and closing date/time.

WFM grants time-off requests, based on seniority and/or rank. If WFM cannot grant certain requests, they are processed after the bidding period closing date/time if there are available slots in the time-off limits. After the closing date/time, WFM continues to process requests. WFM does not wait for agents to make changes to preferred wait-listed requests that are not granted, nor does it update the agent's bidding status.

Important

To configure objects and change settings in the **Time-Off Bidding Periods** view, you must have the appropriate role privileges. See Configuration Role Privileges.

To enable the time-off (vacation) bidding feature:

1. Create the bidding period.
2. Configure its properties by entering the dates and times that you want the period to cover and the bidding period constraints.
3. Associate sites and a multi-site activity with the bidding period.

Important

Time-off requests can be granted during the bidding process only if the time-off types are associated with time-off rules that have auto-granting enabled. If auto-granting for a rule is disabled or the time-off rule is not assigned to a time-off type, the request will not be processed within the bidding process. Also, if the "Allowed Agent Timeout" setting is configured for the bidding period, the time period that it represents will be wasted on these types of requests, because they can never be auto-granted.

However, WFM still waits for agents to change their request to make auto-granting possible.

Handling requests

In the **Calendar** view, you can change the agents' time-off requests, enter new requests, or manually grant existing requests at any time, even after the bidding process has started.

In the **Time-Off Bidding** views, when the bid assignment process is in the Timed Out state, you can manually *skip* the agent. Adjust the order of processing at any time by setting agent's status to Skipped or Ready, indicating that the automatic bid process should not consider the agent's requests. When you set the agent's status to **Skipped**, the bid assignment process moves on to the next agent's request.

When can agents change and submit requests?

Agents can enter time-off requests at any time, even if the bid assignment process has started and their existing requests have been processed. The new requests will be given **Preferred Wait-Listed** status, like all other requests being pooled for bidding. After entering the new requests, agents must change the request status to **Ready**.

Agents must enter time-off requests that cross the bidding period boundaries as two or more separate requests, with all of the items in each request being either fully within or fully outside of the boundaries. WFM rejects requests that straddle the boundaries. If there are existing requests of this type (due to data migration), the bid assignment process considers only the part of the request that is inside the boundaries, even if it means that only the part of request is granted.

Agent cannot delete or recall a single item in a batch request that contains multiple items; WFM performs the same action on all items in the request. The same rule applies if the status of time-off items in the batch changes (to Granted, Preferred, or Declined), but a supervisor can override it.

Resolving requests

When WFM process the bids, it uses the resolution rule that was configured for the bidding period (see Bidding Period Properties rows 10-13) and automatically resolves time-off preferences by either granting them or performing some other action, such as wait-listing. After the Closing date/time, WFM continues processing any time-off requests that were not previously processed, using resolution rules. Time-off requests submitted after the Closing date/time are processed on a FIFO basis.

How automatic bid assignment works

The automatic bid assignment process runs multiple times between the Processing Start date/time and the Closing date/time with a preset frequency using the following algorithm:

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1. For each agent in status **Waiting**:
 - Check if agent's timeout has expired:
 - If expired, set agent to **Timed Out**
 2. If there are still agents in status **Waiting**, which were *skipped* (above):
 - **DONE**. Wait until the next run.
 3. Process the agent list in the predefined order and look for agents in status **Entering** and **Ready**.
 - If **Ready** or **Entering**, but the bidding period **Allowed Agent Timeout** = 0 (which means no waiting for the agent to change requests):
 - Attempt to grant all pending (**Preferred/Wait-Listed**) time-off requests within this bidding period.
 - If all pending requests have been successfully granted:
 - Set agent's status to **Processed** then, moves on to the next agent.
 - Some pending requests could not be granted or agent's status is **Entering**, (meaning the bidding period **Allowed Agent Timeout** value is > 0):
 - Set agent status to **Waiting**.
 - Calculate waiting time, by adding the time-out duration to the next agent's availability interval.
 - **DONE**. Wait until the next run.
 - Continue with the next agent.

Waiting:

The time interval that the system will wait for the agent or is calculated as followings:

1. Convert the current time to the agent's time zone and calculate the agent's current time.
2. If the agent is currently within the scheduled shift from the Master Schedule.
 - Calculate = - .
 - If is less than , then:
 - is + .
 - **DONE**.
 - Otherwise:
 - = - .
 - Agent's current time moves to midnight next day.
 - Calculate Next Day.
3. Or else check to see if the agent has the schedule (other than the shift including, but not limited to Day Off and/or Full-Day Exception) for the calendar day of the agent's current time.
 - =
 - Agent's current time moves to midnight next day.
 - Calculate Next Day.

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4. Or else use agent's Contract and check to see if the agent is currently within Contract availability.
 - Proceed as with the shift above, but with instead of .

Next day:

1. Check if there is a schedule for the day of the agent's current time.
 - Check if it is a shift that starts at the current time or later than the current time.
 - If is less than :
 - is +
 - DONE
 - Otherwise:
 - = - .
2. Or else, check if there is a Contract availability window for the day of the agent's current time.
 - Proceed as with the shift above, but use instead of .
3. Agent's current time moves to midnight next day.
4. If Agent's current time is beyond the bidding period processing interval:
 - = bidding period Closing Date and Time.
 - DONE
5. Calculate Next Day.