GENESYS™

Workforce Management Administrator's Guide

Time-Off Bidding

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Time-Off Bidding

When you enable time-off bidding, WFM processes agent requests for time off that are within a configured bidding period on the same process date and time. This ensures that all requests that were made concurrently within this period are all granted, declined, or wait-listed on the same processing date, and eliminates the possibility that some requests for a vacation period are granted, while others are not. WFM grants these requests, based on seniority and/or rank. If there are available time slots, WFM grants any requests that were not previously granted, based on the order of submission.

Bidding Period

The bidding period is the time interval (in days) when agents can request time off. You determine and configure, edit, or delete bidding periods, based on your contact center requirements. However, you cannot change a bidding period that is being processed or has been processed. All requests within that period are processed on a specified date with a configured ranking, which determines how the requests are resolved.

Any changes you make to the bidding period can take effect immediately. For example, you might set the processing date to a date in the past when the actual bidding period, and the requests within that period, have not yet been processed. If items are flagged by a bidding period and you later delete the period before the processing date occurs, requests for that period are not processed unless you create a new bidding period that covers the dates of those items. If you enter items and then set the bidding period, items are processed if they are eligible for processing (if the preferred wait-list flag is present).

Each bidding period has a status that indicates when it is complete.

Request Processing

WFM batches all agent time off requests that fall within a bidding period, marks them as one request and, after all of the items pass validation, saves them to the WFM database. The initial request can contain any number of items. (Items entered in a previous version of WFM can contain only one item per request.) If items in a request fall within multiple bidding periods, WFM processes the request only once, on the latest processing date for all bidding periods.

You cannot modify single items in a request. If one item is modified, deleted, or recalled, the same action is performed on all items in the request.

Bid Processing

You can manually modify all items in a request before the processing date. Any request items that you manually grant are not automatically processed. WFM processes bidding items when the

processing date conditions are met and the requests in a specified bidding period have not been processed.

During bid processing, any one of the following scenarios can occur:

- All items in request can be auto-granted (and possibly auto-published), based on the agent's seniority or rank.
- All items can be removed from the processing list and remain in **Preferred** status. They can become eligible for wait-list processing (on a first-come, first-served basis by the original submission date), if the following conditions occur:
    - Auto-grant does not apply for at least one item in the batch request.
    - The bidding period no longer applies (was deleted or edited) for at least one item in the request.
    - There are no time-off slots available to accommodate all batch request items on the bidding period processing date.

Time-Off Balances

Bidding time-off items display as regular time-off items and reduce the agent's time-off balance for the specific time-off type.

Wait-List Processing

Wait-listed items are not processed within bidding periods that are not yet processed. If there are no configured bidding periods or a bidding period for the wait-listed item date is already processed, the entire request is wait-listed and the `BatchRequest` configuration option in the `CalendarService` section of `WFM Server Application` is set to `true`. In previous WFM releases, items were wait-listed one by one.

WFM generates a warning when the time-off limit has been reached.

Time-Off Limits

Time-off limits can be changed during active the bidding period, but do not take effect until the processing date for that period. The bidding period implies that time-off limits are set to 0 and time-off requests are not granted. If there is no configured bidding period for a certain date, time-off limits work as in previous WFM releases.