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Workforce Management Web for Supervisors Help

Creating and Configuring Bidding Periods

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Creating and Configuring Bidding Periods

Use the procedures and information in this topic to **create**, **copy**, **delete**, and **suspend** bidding periods.

Creating Bidding Periods

To create and configure a bidding period:

1. Select **Configuration > Time-Off Bidding Periods**.
2. Select a site within a business unit and click **New**  .
The Properties pane opens.
3. Set the bidding period **Properties**.
4. **Associate sites** with this bidding period.
5. Click **Save Now**  .

Tip

You can create bidding periods for the same site that overlap within the Start date/time and End date/time, but the time period between the Opening date/time and Closing date/time must not overlap or intersect.

Copying Bidding Periods

If you want to create another bidding period, using the properties similar to an existing one, create a new bidding period by copying an existing one and then, make the necessary changes.

To copy a bidding period:

1. Select a bidding period in the list and click **Copy**  .
The hierarchy of business units and sites within the enterprise is displayed.
2. In the **Name** field, enter a name for this bidding period.
3. Change the opening, processing, start, and end date/time settings, as necessary.

4. Select the site(s) that you want to associate with this bidding period and click **Save Now**  .

Deleting Bidding Periods

To delete a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to delete.
2. Click **Delete**  .
3. When the **Confirmation** dialog opens, select **Yes** to delete the selected bidding period or **No** to cancel the action.

Suspending a Bidding Period

You can temporarily suspend the bid assignment process for the bidding period by checking **Do not process this bidding period** check box in the **Properties** pane. When checked, time-off requests for the bidding period are not processed. When the check box is cleared, the bid processing resumes processing where it stopped.

If the current date and time is before the Processing Start date/time or past the End date/time, processing is not resumed.

Bidding Period Properties

When you create new bidding periods you must then configure the properties. It is important that you understand the impact of these settings on the bid assignment process, especially when setting the various date and time properties for multiple bidding periods.

Properties Pane Controls

| Control | Description |
|--|---|
| Name | The name of the bidding period. |
| Multi-Site Activity  | Opens a list of multi-site activities (MSA), enabling you to associate one with a time-off bidding period. After the MSA is associated with a bidding period, agents who can perform the MSA are able to bid for time-off within that bidding period. |
| Opening Date and Time | The date and time that the bidding period rules |

| Control | Description |
|--|--|
| | <p>begin to apply to the agent's time-off requests, and the process begins pooling the requests.</p> <p>Agents cannot submit requests for the bidding period before the Opening date/time. However, they can submit requests for any other bidding period configured for the same interval, if it is submitted after the Opening date/time and before the Closing date/time.</p> |
| Processing Start Date and Time | The date and time that this bidding period will start process time-off requests. |
| Closing Date and Time | <p>The date and time that this bidding period will finish processing time-off requests.</p> <p>The bid assignment process runs multiple times between the Processing Start date/time and the Closing date/time, processing the time-off requests begin pooling on the Opening date/time.</p> |
| Start date and time | The date and time that this bidding period interval for time-off requests starts. |
| End date and time | <p>The date and time that this bidding period interval for time-off requests ends.</p> <p>The Start date/time and End date/time properties dictate the interval for time-off requests that are affected by the rules of this bidding period. When setting these dates/time, there are a couple of scenarios, of which you should be aware:</p> <ul style="list-style-type: none"> • Multiple bidding periods configured for the same interval—If you are configuring multiple bidding periods with the same Start dates/times and End dates/times, ensure that the interval between the Opening date/time and the Closing date/time do not intersect or overlap. • Crossing boundaries of the interval—The dates of all concurrent time-off requests must be either inside or outside of the Start date/time and End date/time interval. If agents request time off for dates that cross the bidding period boundary, they must submit separate requests, with each request inside or outside of the Start date/time and End date/time interval. When agents submit cross-interval requests, WFM rejects them. |
| Time zone <i>drop-down list</i> | The time zone that will be used for the dates and times set for this bidding period. You can choose the business unit time zone, if desired. |
| Allowed Agent Timeout | When the agent is in Waiting status, the time interval (in hours and minutes) in which the agent will be allowed to change their time-off requests to |

| Control | Description |
|---|--|
| | <p>comply with time-off limits.</p> <p>If the bid assignment process finds an agent whose time-off preferences it cannot grant, it waits for the time interval specified in this property before moving on to the next agent. However, if an agent is unavailable for the entire waiting period, the bid assignment process does not count the unavailable time. The available time is determined by the agent's schedule or if the schedule is not available, his/her Contract.</p> |
| Maximum number of weeks that can be requested | The maximum number of weeks that the agent can request for the entire bidding period within multiple requests. |
| Maximum number of days that can be requested | The maximum number of days that the agent can request for the entire bidding period within multiple requests. |
| Maximum number of hours that can be requested | <p>The maximum number of hours that the agent can request for the entire bidding period within multiple requests.</p> <p>The default value is 0 for the Maximum number of <weeks, days, hours> that can be requested, indicating that this constraint is not observed for this bidding period.</p> <p>Only time-off requests made after the bidding period opening date/time are counted against the Maximum number of <weeks, days, hours> settings.</p> |
| Minimum consecutive days | <p>The minimum number of consecutive days that the agent can include in a single request.</p> <p>This property defines the required number of combined day-off and time-off requests for a single request. If agents have days off defined by their Contract, granted Calendar days off, or Rotating Pattern days off, then they are counted in the Minimum consecutive days parameter. In other words, agents do not have to request time off for known days off.</p> |
| Allow full-day time-off requests only <i>check box</i> | When checked, agents can request only full-day time off (cannot request part-day time off). |
| Criteria <i>radio buttons</i> | <p>The 4 available priorities for this bidding period; Rank, Seniority, Seniority and Rank, or First come, first serve.</p> <p>Requests will be granted, declined, or wait-listed, based on the selected priority.</p> <p>If the sorting criteria is set to First come, first serve, the timestamp is taken from the last date/time that the agent changed his/her bidding status to Ready, (not the date/time that the request was</p> |

| Control | Description |
|--|---|
| | submitted). |
| Do not process this time-off bidding period. (It will be automatically checked by system after it was processed) <i>check box</i> | Enables you to suspend the bid assignment process if, for any reason, you need to temporarily suspend it, or if you do not want the bidding period to be processed for any reason. Be sure to save the Properties settings if you check this box for an existing bidding period. |
| Message to agents | Enables you to add any message that you feel is relevant to the agent about this bidding period. |

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 backend deployed in your environment is a version earlier than 8.5.203, the Time-Off Bidding views displayed in the interface more closely matches the procedures below. The only other topic on this page applicable to versions prior to 8.5.203, is [Deleting Bidding Periods](#).

Configuring Time-Off Bidding Periods

To configure a bidding period:

1. In the **Configuration** module, select **Configuration > Time-Off Bidding Periods**.
2. Select a site within a business unit and click **New**  .
The Time-Off Bidding Period Properties pane opens.
3. Enter the bidding period parameters in the following fields:
 - **Name**—Enter a name for the bidding period.
 - **Processing date and time**—Enter the date and time that the requests within this bidding period will be processed.
 - **Start date and time**—Enter the date and time that this bidding period starts.
 - **End date and time**—Enter the date and time that this bidding period ends.
4. From the drop-down list, select a Time zone. (You can choose the business unit time zone, if desired.)
5. Enter a value for the **Minimum days per request**.
6. Select one of four priorities for this bidding period; **Rank**, **Seniority**, **Seniority and Rank**, or **First come, first serve**.
Requests will be granted, declined, or wait-listed, based on the priority.
7. Check the **Do not process this time-off bidding period. (It will be automatically checked by system after it was processed)** check box if you do not want the bidding period to be processed for any reason.
8. In the **Message to agents** field, add any message that you feel is relevant to this bidding period.
9. [Associate sites](#) with this bidding period.

10. Click **Save Now**  .

Tip

When saving bidding periods, if the dates for any two periods for the same site overlap, WFM displays an error message.

Copying a Bidding Period

To copy a bidding period and change the sites associated with it:

1. Select a bidding period in the list and click **Copy**  .
The hierarchy of business units and sites within the enterprise is displayed.
2. In the **Name** field, enter a name for this bidding period.
3. Select the site that you want to associate with this bidding period and click **Save Now**  .