



Schedule-Shift Bidding: Will it work for us?

Webinar handout
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About this document

This document accompanies the CommunityWFM College webinar *Schedule-Shift Bidding. Will it work for us?* It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Schedule Bidding

CommunityWFM Enterprise offers a fully automated end-to-end approach for schedule bidding.

1. Create optimized schedules independent of agents,
2. choose which agents will participate in the bid,
3. allow agents to rank their choices,
4. automatically reconcile agent rankings against the available inventory of schedules.

CommunityWFM then builds the completed schedule templates and seamlessly assigns them to agents with minimal manual administration required. Those templates can then be used to build the schedules.

CommunityWFM's unique agent bidding interface color codes schedules for agents, based upon the probability of receiving a particular schedule given their rank amongst their peers. This approach allows agent visibility into what schedules they are likely to receive when the ranking is assigned.

Administration

Bid administrators are in complete control of the bidding process. When creating a new bid, the bid administrator may choose to add additional administrators (supervisor level or above) for that bid instance. We recommend [adding at least one additional bid administrator](#) then assigning tasks from the following options:

- Edit administrator list.
- Edit schedule bid inventory.
- Edit bid properties.
- Modify the bid status.
- Edit the bid roster.
- Create and assign schedule templates.
- Customize the memo interface.



Creating a Bid

Prerequisites

Ranking profiles

You must have a ranking profile in place so the system knows how to rank the agents for bidding. See [Ranking Profiles](#).

Schedule preferences

Agents can pre-establish their schedule ranking by using personal schedule preferences (Schedule > Schedule preferences > Start time preferences, or Schedule day preferences). Schedule preferences are not guaranteed, but the system will look at preferences to pre-rank the schedules presented in the bid.

If planning manual schedules

If planning to manually add inventory items (schedules) to the bid, you need to have—

- **A working schedule:** Unless you plan to create each schedule in the bid one at a time.
- **An agent template:**
You might consider using agent templates if you want agents to bid on schedules that are a best fit for your environment rather than the schedule templates already assigned. For example, you could create a “what-if” scenario based on your forecast for the week and include 100 copies of a common day floating agent template. This will create the best 100 schedules to cover the needs based on the forecast, then agents can bid on those schedules.

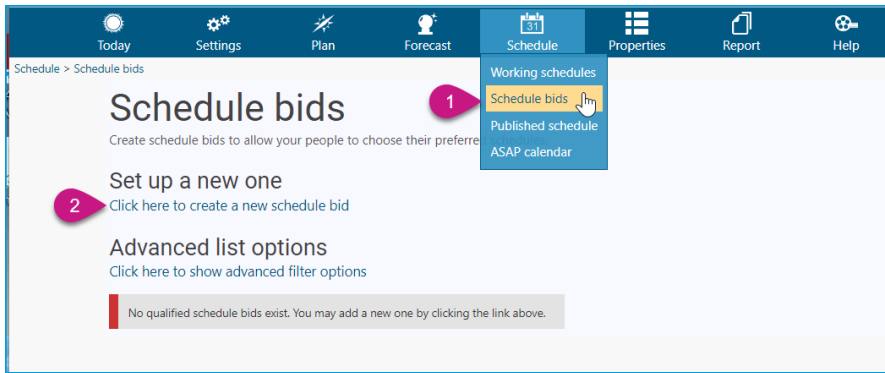
Note: Schedules created for a bid will be “fixed” schedules, even if based on common day floating or rotating schedules.

Getting started

1. Navigate to Schedule > Schedule bids.



2. Select *Click here to create a new schedule bid*.

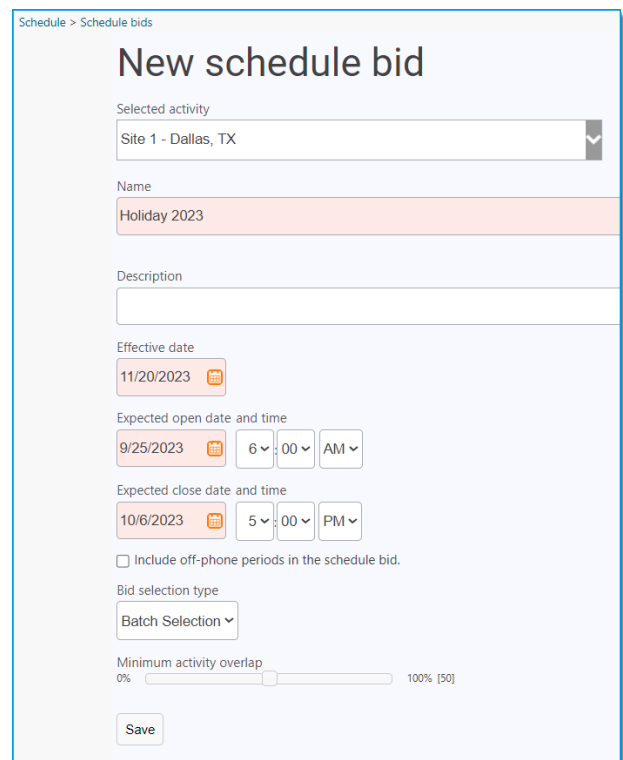


Selected activity: Select which parts of the organization will participate in the bid by choosing an Activity.

Name: Give the bid a descriptive name. Description is optional.

Effective date: You'll want to pick a date that matches the *First day of schedule week* in the basic properties of your Enterprise Model. This is the date when the new schedules will go into effect.

Expected open and close data and time: Enter the expected opening and closing dates of the bid selection process. To schedule the actual closing date and allow unattended closing of the bid, you must complete the [Close the bid](#) options after the bid is open.



Include off-phone periods in the schedule bid: Check the box if you want to include breaks and lunches as part of the bid. If included as part of the bid, the resulting schedules will have fixed breaks and lunches. Leave it unchecked if breaks and lunches will be determined separately by assigning a breakset in the last step of the schedule bid.

Selection type: Batch selection is the only option.



Minimum activity overlap: Administrators may determine the degree of skill matching required for bidding. If the activity overlap is set to 0%, an agent will be able to bid on any schedule in the inventory. If the activity overlap is 100%, an agent will only see schedules that match their activities 100%. If the activity overlap is set to 50%, they will see the schedules if 50% or more of their activities overlap.

For example, if an agent is assigned three activities and the slider is set to 100%, they will only see schedules that have those three activities assigned. If an agent is assigned one activity and the slider is set to 50%, the agent will see schedules that have their activity and one other, but if a schedule has three activities, this agent will not see it because the match would be 33.3% not 50%.

A common use of this activity slider is when there are bilingual agents, and you don't want them to bid on an 'English only' schedule.

Click *Save* to open the *Schedule bid worksheet*.

Schedule Bid Worksheet

Add or remove bid administrators

Pro tip: It's best practice to add someone else as an alternate bid administrator, just in case you win the lottery.

Only the person who creates the bid can edit or manage the bid, until adding another administrator.

At the top of the Schedule bid worksheet, you can see whether you are logged in as the bid administrator.

Select *Click here to add or remove bid administrators* to view the list of current bid administrators and to add additional administrators.



In the pop-up, check each additional administrator you wish to add for this bid then *Save*.

Bid administrators			Administrator capabilities
Edit the list of bid administrators			
Id	Add?	Name	
1	<input type="checkbox"/>	Account, Service	
182	<input type="checkbox"/>	Blair, Travis	
537	<input type="checkbox"/>	Brown, Matt	
2	<input checked="" type="checkbox"/>	Cotharin, Todd	
90	<input type="checkbox"/>	Gonos, Daryl	
328	<input type="checkbox"/>	Hooper, Lisa	
298	<input type="checkbox"/>	Mitchell, Lauren	
444	<input type="checkbox"/>	Munoz, Maria	
126	<input type="checkbox"/>	Nixon, Jacqui	
153	<input type="checkbox"/>	Wildrick, Brian	
148	<input type="checkbox"/>	Wingard, Jason	

Save

On the Administrator capabilities tab, select or de-select the abilities to assign to the additional administrators.

The selected additional capabilities will apply to all alternate bid administrators.

Schedule bid administrators and capabilities	
Bid administrators	Administrator capabilities
Configure the capabilities of bid administrators	
<input checked="" type="checkbox"/>	Can Edit Administrator List
<input checked="" type="checkbox"/>	Can Edit Schedule Bid Inventory
<input checked="" type="checkbox"/>	Can Edit Bid Properties
<input checked="" type="checkbox"/>	Can Modify the Bid Status
<input checked="" type="checkbox"/>	Can Edit the Bid Roster
<input checked="" type="checkbox"/>	Can Create and Assign Schedule Templates
<input checked="" type="checkbox"/>	Can Customize the Memo Interface

People

After completing the initial setup, choose the bid participants. Click the People tile to open the selection window. Check the boxes to select individuals or click *Select all*.

Pro tip: if you want to add all but a few people to the bid, click *Select all*, then remove the few who won't participate.

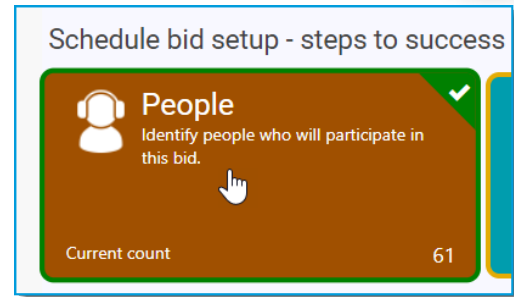
Schedule bid - people				
Sample				
Id	Add?	Agent Name	Role	Schedule Inventory?
278	<input type="checkbox"/>	Areheart, Sam	Agent	<input type="checkbox"/>
156	<input type="checkbox"/>	Azzarito, Deborah	Agent	<input type="checkbox"/>
453	<input type="checkbox"/>	Badgett, Gregory	Agent	<input type="checkbox"/>
451	<input type="checkbox"/>	Barton, Jean	Agent	<input type="checkbox"/>
479	<input type="checkbox"/>	Bickley, Sharon	Agent	<input type="checkbox"/>
27	<input type="checkbox"/>	Blakely, Latrice	Agent	<input type="checkbox"/>
467	<input type="checkbox"/>	Brown, Chanell	Agent	<input type="checkbox"/>
402	<input type="checkbox"/>	Burns, Barbara	Agent	<input type="checkbox"/>
391	<input type="checkbox"/>	Carabo, Randy	Agent	<input type="checkbox"/>

Save Select all Unselect all

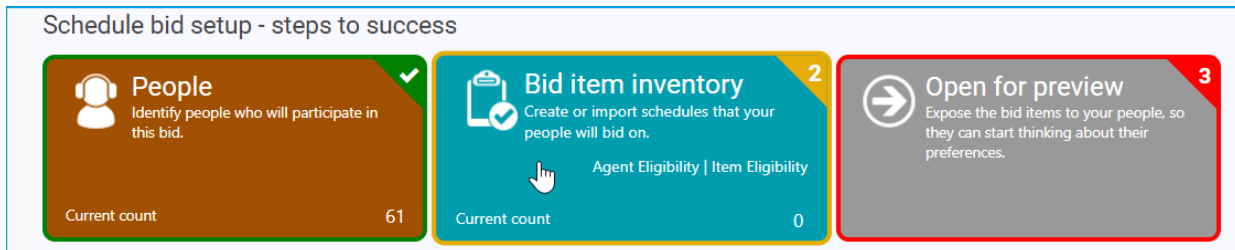


Click *Save*.

The pop-up will close, and the People tile will have a green check and show the number of selected participants.



Bid item inventory



Bid item or schedule inventory refers to the set of schedules that agents will be ranking. Skill compatibility and classification determine the inventory presented in the agent bidding interface. Schedule inventory can be imported from an optimized set of schedules created specifically for this bid, or existing schedules that are still considered effective may be reused and offered to the same agents based upon updated ranking criteria.

Breaks and lunches will be reflected on inventory items when included with the bid (remember the checkbox in the basic properties?).

Schedule inventory can be modified, replaced, and manually created as necessary until opening the bid.



The schedule bid inventory worksheet shows the number of schedules, number of bid participants, and the variance. Your bid should include a schedule inventory sufficient to accommodate the number of participants or there may be agents who don't get a schedule, or schedules that don't have an assignment.

Schedule bid inventory worksheet
Holiday 2023

Inventory statistics

10 days remaining until the bid is closed.

Schedules in bid inventory:	0
Current participant count:	61
Variance (Inventory - Participants):	-61

Status: Insufficient inventory count
Action: Create or import additional inventory items.

How do you want to add schedules to your bid inventory?

Import from a working schedule
Pick a working schedule and import them into this bid.

Create them by hand
Build schedules directly into the bid by hand.

Want to report on the inventory or start over? Choose from these options.

Current inventory report
Show the schedule inventory details, or choose one of these reports.
Agent Eligibility | Item Eligibility

Delete all inventory items
Delete all items in the inventory and start over.

Current inventory

Create or import schedules for the bid.

You can add schedules to the bid inventory manually or by importing from a working schedule or both.

How do you want to add schedules to your bid inventory?

Import from a working schedule
Pick a working schedule and import them into this bid.

Create them by hand
Build schedules directly into the bid by hand.



Import from a working schedule

1. **Working schedule:** Select the start date of the working schedule you wish to use.
2. **Only import schedules from Schedule Bid Participants:** Check the box if you want to import only schedules used by the bid participants. This will match the names – it will only include schedules from the working schedule that match a named participant in your bid. If you are using agent templates for your bid or a what-if scenario, don't select this option (because there will be no schedules to include).
3. **Selected schedule options:** default is *Automatically import all qualifying schedules as inventory items*, or you may choose to manually select the schedules to import if you don't want to include all of the schedules from this working schedule.

Import inventory items for Holiday 2023
Step 1: Import properties

Working schedule
 Week of 9/25/2023 1

Selected schedule details
 Only import schedules from Schedule Bid Participants. 2

Selected schedule options
 Automatically import all qualifying schedules as inventory items 3

Only include participants with the selected employee classification
 -- No Selection -- 4

Time zone selection
 Use my default time zone 5

Next > 6

4. **Only include participants with the selected employee classification:** If the schedules were created using schedules for agents who have an assigned classification, the classification **must** be selected here. If you leave this as *No Selection*—it won't bring over any schedules.

If using agent templates to create the schedules for bidding (agent templates don't typically have an assigned classification), and you leave this as *No Selection*, and the agent who is bidding has an assigned classification, they won't see the schedules to bid upon.

For example, if you have classifications of full time and part time, and are doing the bid for only full-time, selecting full time here will bring over schedule inventory that are also assigned the same classification.

5. **Time zone selection:** Options include your default, corporate, or select a time zone.
6. Click *Next*.

Review the inventory items then select *Finish* to add the schedules to the bid inventory or *Start over*.



Create them by hand

Follow the steps to success to manually build as many schedules as needed, including the breaks and lunches.

Step 1: Basic item properties

1. **Item name:** Give the inventory a descriptive name.
2. **Description** is optional.
3. **Agent template:** select a template from the drop-down menu. This is required. The system needs to know which activities to create the schedule against. To create an agent template, go to Settings > People & agent templates > Agent templates.
4. **Event type:** select an event type, typically *Work*.
5. **Start and End time:** enter the start and end time for this schedule.
6. **Associated breakset:** If creating bid items manually and assigning a breakset, it will assign the breakset to the shift. If not assigned, the shift won't have breaks or lunches. If no breakset is associated with the template (as in this screenshot), you can create one on the next screen. If using breaks as part of the bid, leave this as no selection.
7. **Number of copies to add:** Enter the number of copies of this schedule to add to your inventory for bidding.
8. **Time zone selection:** Options include your default, corporate, or select a time zone.
9. Click *Next*.

Create inventory items for Holiday 2023
Step 1: Basic item properties

Item name 1

Item description 2

Agent template 3

Event type 4

Start time 5 End time 5
 : AM : PM

Associated breakset 6
No breakset selection necessary; you must select the off-phone periods in the next page of the wizard.

Number of copies to add 7

Time zone selection 8

9



Step 2: Pick weekdays

Check the workdays to include in this schedule. This can include Saturdays and Sundays.

Step 3: Define off-phone periods

If not included in your template, create the breaks and lunches here. Breaks and lunches will be the same for each day in the week.

Create inventory items for **Spring 2024 bid** 1 2 3 4

Step 3: Define off-phone periods

In this step, you may either review the selected break set intervals or create off-phone periods for this inventory item. Please follow the instructions on the page and press "Next >" when you are ready to continue.

This bid allows agents to bid on off-phone intervals; please enter any off-phone periods included in this bid item.

Event Type	Start Time	Hours	Minutes	Description
<input checked="" type="checkbox"/> Break	10:00 AM	0	15	AM break
<input checked="" type="checkbox"/> Lunch	1:00 PM	0	30	Lunch
<input checked="" type="checkbox"/> Break	3:30 PM	0	15	PM break

Step 4: Review inventory items

Review your schedule and click *Finish* to save it. Close the window to return to the worksheet.

Create inventory items for **Spring 2024 bid** 1 2 3 4

Step 4: Review inventory items

Please review the following schedule intervals as they will appear in the schedule bid inventory. If these intervals are correct, press "Finish" to save the inventory items.

	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM
Monday																	
Tuesday																	
Wednesday																	
Thursday																	
Friday																	
Saturday																	
Sunday																	



After adding the schedules, return to the schedule bid inventory worksheet and refresh the page. The *Schedules in bid inventory* should equal the *Current participant count* (variance = 0). If there is a discrepancy, amend either the participant count or the number of schedules, or know that if the inventory is greater than the participant count, some schedules will not be assigned. If the participant count is greater than the inventory, some agents won't receive a schedule.

Inventory statistics	
10 days remaining until the bid is closed.	
Schedules in bid inventory:	61
Current participant count:	61
Variance (Inventory - Participants):	0

Status: Balanced inventory count
Action: None

Review Inventory

To see how many schedules will be available for each agent to bid on, select *Agent eligibility* from the report section.

Want to report on the inventory or start over? Choose from these options.

Current inventory report

Show the schedule inventory details, or choose one of these reports.

Agent Eligibility
Item Eligibility

Delete all inventory items

Delete all items in the inventory and start over.

Agent eligibility report for Test agent view 62 Inventory items

Rank	Agent id	Agent Name	Employee classification	Eligible inventory items	Item percent eligible
✓ 33	278	Areheart, Sam		62	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]
✓ 23	156	Azzarito, Deborah		62	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]
✓ 59	453	Badgett, Gregory		62	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]

Conversely, the *Item eligibility* report will show a list of the schedules and the number of agents who will see the schedule.

Item eligibility report for Test agent view 62 Inventory Items

Item Id	Item Name	Item description	Employee classification	Eligible participants	Participant Percent Eligible
✓ 1378	Bid 25 Item 1, Days: Mon; Tue; Wed;	Shift Duration: 11 Hours		63	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]
✓ 1379	Bid 25 Item 2, Days: Mon; Tue; Wed; Thu; Fri; Sat; Sun;	Shift Duration: Variable Duration		63	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]
✓ 1380	Bid 25 Item 3, Days: Mon; Tue; Wed; Thu; Sat; Sun;	Shift Duration: Variable Duration		63	<div style="width: 100%; height: 10px; background-color: green;"></div> [100.00]




Open for preview

When you open the bid for preview, agents can review the schedules and “like” or “dislike” them but cannot place their bids yet. This allows agents to review their options, like or dislike specific schedules, and bookmark their choices. Ranking and committing their choices will not be available until the bid is opened.


You must open the bid for preview prior to opening for bidding.

Schedule bid setup - steps to success



People
Identify people who will participate in this bid.


Current count 63



Bid item inventory
Create or import schedules that your people will bid on.

Agent Eligibility | Item Eligibility

Current count 62



Open for preview
Expose the bid items to your people, so they can start thinking about their preferences.


3

Open for preview
Test agent view

Please provide the following form values and press “Open for Preview” when finished. This will expose the current bid inventory to participants and allow them to begin considering bid selections.

Responsible administrator
Account, Service

Ranking profile

Preview expires on
 

Send a notification memo to bid participants.
 Send a notification memo to bid administrators.

Memo subject

Memo body
 A new schedule bid is available for your review. Please click the link below or check your Schedule Bid Status applet on the application's home page for further details.

Ranking profile: How to rank agents for the bidding. Who will get first choice? Click *Preview* to see the list of agents and their rank. The ranking profile determines the order in which agent selections are matched to the schedule inventory. Seniority is a common ranking profile.

Note: If using a custom field as one of the ranks (e.g., performance score), all agents participating in the bid must have an entry in that field in their profile or they will go to the



bottom of the rank for bidding, even if another field (e.g., seniority) might have placed them higher in the ranking order.

Pro tip: If using seniority, it's best practice to have at least one tie breaker value for when more than one person is hired on the same date.

See [Appendix](#) for more information about setting up ranking profiles.

Preview expires on: Select the expiration date. This does **not** set the date that the bid will open.




Notifications: you may elect to send a notification to the bid participants and administrators that the preview is open.

Memo subject: You may change the memo subject line here.

Click *Open for Preview* to allow agents to review their options.

To disable previewing prior to the selected expiration date, select *Rescind the preview*.

A horizontal row of three buttons. The first button is blue and titled 'Bid item inventory' with a sub-description 'Review the inventory of schedules currently visible to the participants in the bid.' and a 'Current count' of 62. The second button is green and titled 'Open the bid' with a sub-description 'Open the bid for agent selections. Note that you can't make changes to the bid when it is open.' The third button is yellow and titled 'Rescind the preview' with a sub-description 'Prevent your people from seeing the bid items.' Each button has a circular icon with a right-pointing arrow, a right-pointing arrow, and a left-pointing arrow respectively.

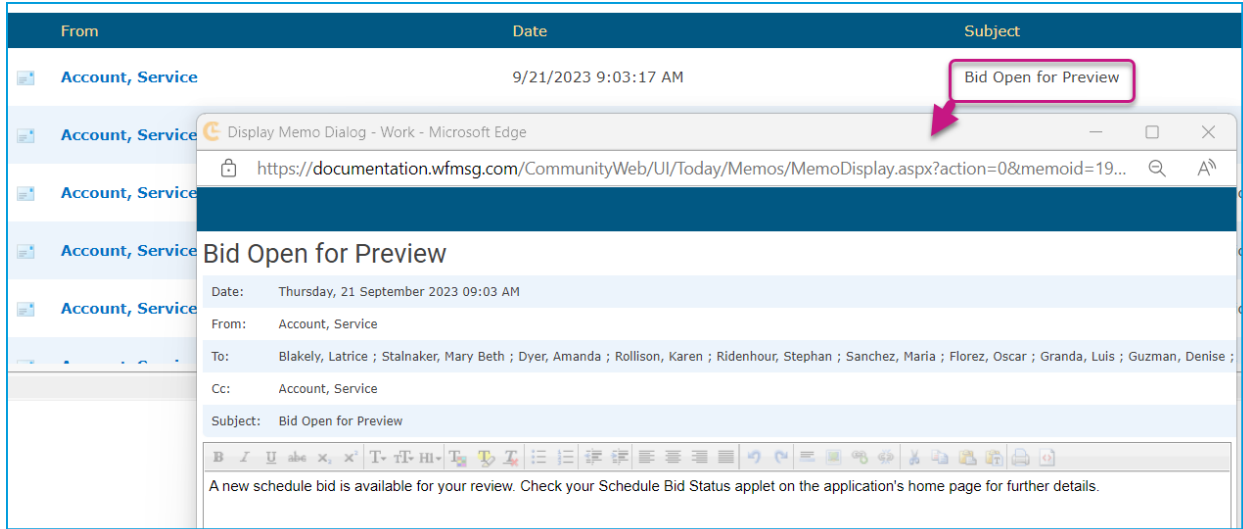
 Bid item inventory Review the inventory of schedules currently visible to the participants in the bid. Agent Eligibility Item Eligibility Current count: 62	 Open the bid Open the bid for agent selections. Note that you can't make changes to the bid when it is open.	 Rescind the preview Prevent your people from seeing the bid items.
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Agent Interface—Preview

Notification

If you selected the option to send notifications, agents receive a notification that a bid is open for preview.



Schedule Bid Status

In the home page module, schedule bids open for preview will have a red ball with an open lock. The number indicates their rank. Agents may click the link to view the inventory of available schedules.

Schedule Bid Status

 Holiday 2023

 Open date: 25 September 2023
 Close Date: 06 October 2023
 Effective Date: 20 November 2023

56 Participants: 61
[Click here to view inventory](#)

In preview mode, all the items are green, and there is no option to rank the choices, but they may be sorted. Individual schedules may be liked, disliked, or bookmarked.



Bid rank: 59 of 63

Important dates:
 Bid Open Date: Friday, September 22 2023 12:00 AM
 Bid Close Date: Tuesday, September 26 2023 12:00 AM
 Bid Effective Date: Monday, October 02 2023 12:00 AM

Utilities:
 Likes (X), Bookmarks (X), List view (☰)

Report options:
 Item sort option: Preference score derived from your schedule preferences
 Show items that I "Like" first in the list.
 Regenerate inventory list

Item ID	Weekday	Earliest Start	Latest End	Preference Score	Activity Score	Current Bid Score
1384	Monday	06:00 AM	02:30 PM	0.88	100.00	83.24
1383	Monday	11:00 AM	10:45 PM	0.00	100.00	100
1385	Monday	09:00 AM	09:00 PM	0.00	100.00	81.85
1386	Monday	05:00 PM	02:00 AM	0.00	100.00	73.47
1388	Monday	06:00 AM	12:00 AM			
1391	Monday	10:00 AM	06:30 PM			
1394	Monday	09:00 AM	06:00 PM			
1396	Monday	07:00 AM	11:00 PM			

Sorting options include by preference score, start time, or specific day-off combination.

Report options
 Item sort option:
 Preference score derived from your schedule preferences
 Preference score derived from your schedule preferences
 Start time (average start time if days do not have the same start time)
 Specific day-off combination (choose a pair of days)
 Regenerate inventory list

If choosing to *Show items that I "Like" first in the list*, the most recently liked item will be first in the list. While you can move items to the top of the list by liking them (or the bottom of the list by disliking), ranking doesn't occur until the bid is opened for selection.

Report options
 Item sort option:
 Preference score derived from your schedule preferences
 Show items that I "Like" first in the list.
 Regenerate inventory list

1396 1384

Preference score: The score based on any predefined schedule preference rankings. Agents can pre-establish their schedule ranking by using personal schedule preferences (Schedule > Schedule preferences > Start time preferences, or Schedule day preferences). Schedule inventory will be automatically pre-ranked based upon these preferences. A heart icon indicates that the



schedule is a closer match to the agent preferences; a broken heart indicates that it is less desirable based on the agent's preference ranking.

Activity Score/Compatibility: What percentage of activities in this schedule does the agent match?

Bid Score: The likelihood of not receiving this schedule. See [Color Coded Probabilities](#).

Selecting *Show Item Details* will show the schedule layer view. Agents may like, dislike, and bookmark schedules in this view.

1384 Bid 25 Item 7, Days: Mon; Tue; Wed; Thu; Sun; Shift Duration: Variable Duration

	12:00 AM	1:00 AM	2:00 AM	3:00 AM	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	11:00 PM
Monday							█	█	█	█	█	█	█	█	█									
Tuesday							█	█	█	█	█	█	█	█	█									
Wednesday							█	█	█	█	█	█	█	█	█									
Thursday							█	█	█	█	█	█	█	█	█									
Friday																								
Saturday																								
Sunday							█	█	█	█	█	█	█	█	█									

Item Scoring
 Preference Score: 0.88
 Activity Compatibility: 100.00
 Bid Score: 83.24

Item Settings
 Current Rank: None
 Opinion: None
 Bookmark: No

Item Options
 Like
 Dislike
 Bookmark

Current Rank: Won't show a score in preview mode.

Opinion: Shows if this schedule has been liked or disliked.

Bookmark: Shows whether this item is bookmarked.

Open the bid

You can open the bid manually at any time or schedule it to open automatically at a future date and time. Once open, you cannot edit the participants or inventory items.

Bid item inventory
 Review the inventory of schedules currently visible to the participants in the bid.
 Agent Eligibility | Item Eligibility
 Current count: 62

Open the bid
 Open the bid for agent selections. Note that you can't make changes to the bid when it is open.

Rescind the preview
 Prevent your people from seeing the bid items.



Ranking profile: We recommend keeping the ranking profile the same as the one you used when creating and previewing the bid.

Select the **open and close dates** for the bid. As with opening for preview, you can choose to send notifications to the participants and administrators.

Note: entering the close date and time here does not finalize the automatic closure of the bid. See [Bid completion](#).

Click *Open for Selection* to open the bid.

The screenshot shows a form titled "Open the bid" with the following fields and options:

- Test agent view
- Responsible administrator: Account, Service
- Ranking profile: Seniority (dropdown), Preview (button)
- Note: "Note that if the open date is later than today's date, the bid will remain in 'Preview' status until the selected date. At that time, the application will automatically update the bid status to 'Open.'" (highlighted in yellow)
- Open date and time: 9/22/2023, 12:00 AM
- Close date and time: 9/26/2023, 12:00 AM
- Send a notification memo to bid participants (checked)
- Send a notification memo to bid administrators (checked)
- Memo subject: Bid Available for Selections
- Memo body: A schedule bid is now open for selections. Please check your Schedule Bid Status applet on your home page for additional information.
- Open for Selection (button)

After opening the bid, the only role of the administrator is to monitor the bidding and if necessary, rank choices for agents who are not able to do it themselves.

Agent Interface—Open bid

Agents receive a notification (if selected) that the bid is open, and the *Schedule Bid Status* in the home page module shows a green ball with an open lock.

The screenshot shows the "Schedule Bid Status" applet with the following information:

- 2024 Jan-Mar
- Open date: 01 September 2023
- Close Date: 29 September 2023
- Effective Date: 01 January 2024
- Participants: 62
- Time remaining 1 day(s) 17:15:14
- Click here to view inventory



Color Coded Probabilities

When viewing the schedule inventory in an open bid, agents see the schedules for which they are eligible in a simple color-coded interface.

Four colors (green, yellow, orange, and red) reflect the current bid score—the likelihood of receiving a particular inventory item based on the selections of higher-ranking agents.

Current bid score: The likelihood of **not** receiving that schedule.

Green = 0–5% chance of not receiving the schedule (i.e., 95–100% chance of receiving it)

Yellow = 5–10%


Orange = 10–20%

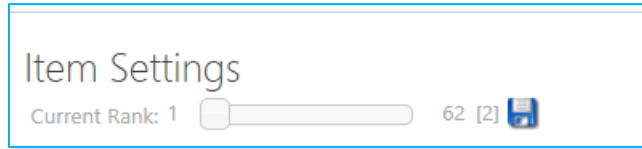
Red = 20–100%

Red and orange inventory items indicate that higher ranked agents are focused on these schedules, where yellow and green indicate a good chance of getting those schedules. As higher ranked agents continue to adjust their bid selections, color coding reflects the most current conditions.

Agents may review individual inventory items and like, dislike, rank, move, and bookmark them. **Note:** When liking or disliking in an open bid, it does not rank or change the location of the bid item.

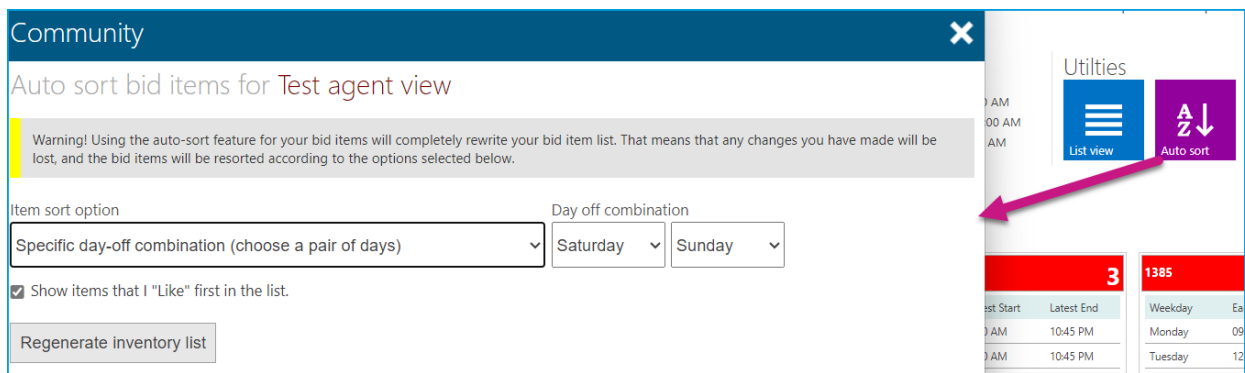


To change the rank of an item, use the slider. The number in [] shows the current rank. After changing the rank, be sure to click the *Save* icon .



Item Auto sort—ranking

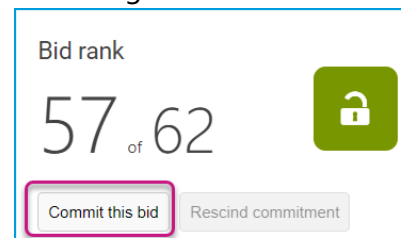
When viewing the schedule inventory, agents can select Auto Sort to rank their options by preference score (from their schedule preferences), start time, or specific day-off options (and can select the pair of days off, e.g., show schedules with Saturday and Sunday off at the top of the list), and choose whether to rank “liked” items first in the list. Selecting Auto Sort this will re-sort any previous selections.



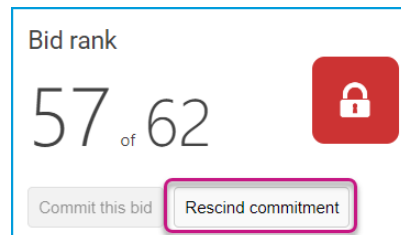
After making the selection, click *Regenerate inventory list* to view the new order.

Note: this will rewrite the order of selections and erase any prior changes.

After ranking the inventory list, select *Commit this bid*.



After committing, the lock closes and the tile is red. To make additional changes prior to bid closure, select *Rescind commitment*.





Administrator - Bid Completion

To schedule a date for closing the bid, or to close it manually, select *Close the bid*. Even if you selected a date to close the bid, **you must open this window and set the parameters for closing**. If you don't complete this step, the bid will remain open indefinitely.

The bid is open for selection, choose from these options

Before this bid will close automatically on Tuesday, September 26 2023 12:00 AM, you must confirm the close settings by selecting "Close the bid". If you do not confirm the settings for closing the bid, then the bid will remain open indefinitely.

Bid response report
Review the current selections for this bid.

Responses: 0

Close the bid
Manually close the bid to your people so you can begin assigning bid selections.

Rescind the open bid
Change the status of the bid back to "Preview".

Close the bid

Test agent view

Responsible administrator
Account, Service

Note that if the close date is later than today's date, the bid will remain in "Open" status until the selected date. At that time, the application will automatically update the bid status to "Closed."

Close date and time

 :

Automatically commit any non-committed bids.
Please remember that the assignment function will only consider committed bids.

Send a notification memo to bid participants.

Send a notification memo to bid administrators.

Memo subject

Memo body
 The current schedule bid is now closed for selection. You will be notified at a later time when the bid is published.

Automatically commit any non-committed bids: If checked, the system will save the current order of items for each agent. **If not checked, agents who have not made a selection** (i.e., no bids committed) **will not receive a schedule**. After assigning the schedules, the Schedule Bid Status will show a closed lock and "No Assignment Available."


Schedule Bid Status	
	Holiday 2023
	Open date: 26 September 2023
	Close Date: 26 September 2023
	Effective Date: 20 November 2023
2	Participants: 61
	Click here to review assignment
	2024 Jan-Mar
	Open date: 01 September 2023
	Close Date: 27 September 2023
	Effective Date: 01 January 2024
3	Participants: 62
	No Assignment Available



Assign bid selections


CommunityWFM allows you to automatically pair agents with their selections based upon the previously established rank order. In seconds, CommunityWFM completes what can take hours manually. Select *Assign bid selections*.

The bid is closed, choose from the following options




Bid response report
Review the current selections for this bid.

Responses 63



Assign bid selections
Review, manage and confirm your bid participants' final schedules.




Re-open the bid
Re-open the bid to give your people another opportunity to customize their selections.

In the pop-up window click *Begin assignment*.


Follow the *Assign bid selections* steps to success.

Assign bid selections - steps to success




1 Create & manage the bid roster
Create the initial bid roster, then customize it to fit your requirements.

Assignments 0



2 Assign schedule templates
The final step in the bid process allows you to convert the bid roster into schedule templates and assignments.




3 Finish the bid
Mark the bid as complete and alert your people.

1. Create and manage the bid roster.


On the bid roster worksheet, select *Create the initial bid roster*. This is the process of awarding the agents their shift that is first available in the inventory list.

Manage bid roster - steps to success




1 Create the initial bid roster
Join the participants to their highest ranked available item.


Assignments 0



2 Revise the bid roster
Review and edit the bid roster.



Unassigned participants



Schedule roster



In the pop-up, click *Create bid roster*.

Create initial bid roster
Test agent view

This dialog allows you to create the initial bid roster based on the rankings of the bid participants and their individual inventory item rankings. When you are ready to continue, press the "Create Bid Roster" button below.

Clicking the button below will create a new Bid Roster, and remove any changes you may have made to the existing bid roster. Please use caution when using this feature.

Create bid roster

The pop-up closes and you can see the number of assignments in the tile.

Manage bid roster - steps to success

Create the initial bid roster
Join the participants to their highest ranked available item.

Assignments 62

Revise the bid roster
Review and edit the bid roster.

Roster Assignment Report

Select *Revise the bid roster* to view the Roster Assignment Report, which shows each agent, their rank in the bid, and how they ranked the bid inventory item that they received.

Roster assignment report for Test agent view 62 Total Assignments

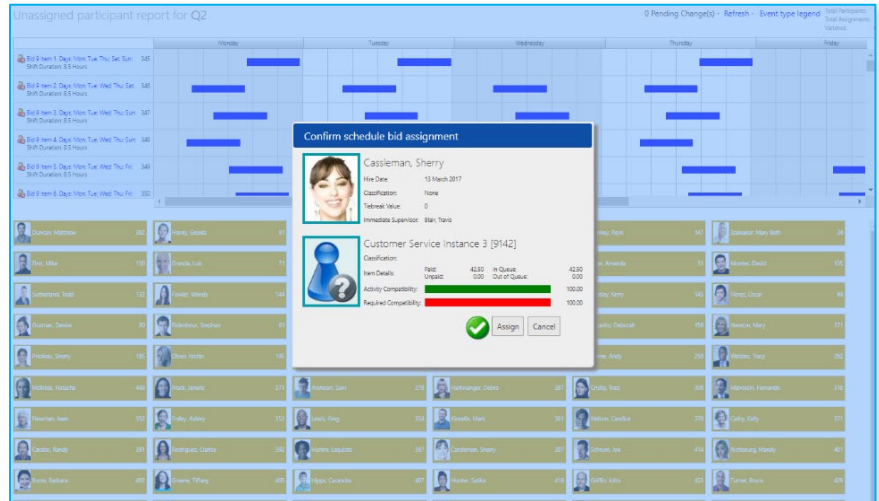
Rank	Agent id	Agent name	Employee classification	Item id	Inventory item name	Agent's item rank	
	1 382	Duncan, Matthew		1383	Bid 25 Item 6, Days: Mon; Tue; Wed; Thu; Fri; Sat;	1	Remove
	2 91	Heinly, Gesela		1384	Bid 25 Item 7, Days: Mon; Tue; Wed; Thu; Sun;	2	Remove
	3 409	Schmidt, Peter		1385	Bid 25 Item 8, Days: Mon; Tue; Wed; Thu; Fri; Sat; Sun;	3	Remove
	4 65	Sanchez, Maria		1379	Bid 25 Item 2, Days: Mon; Tue; Wed; Thu; Fri; Sat; Sun;	1	Remove

This is also known as the "who will be mad" or the happiness report.



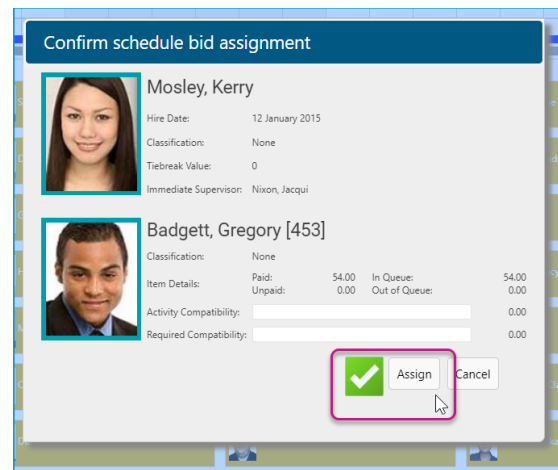
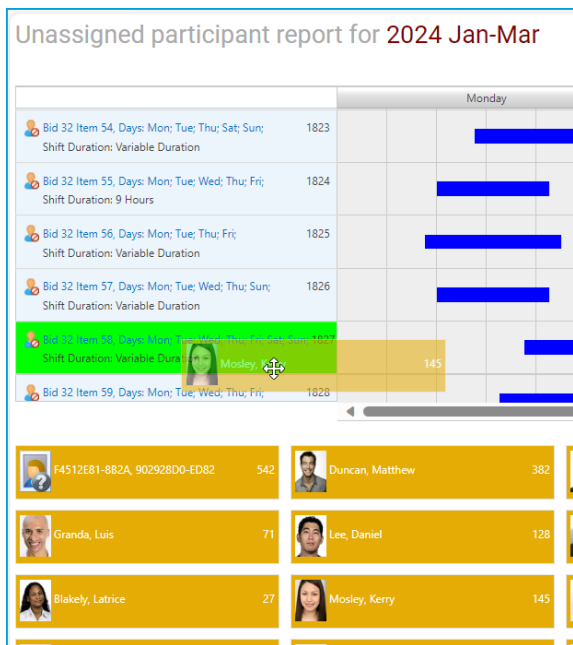
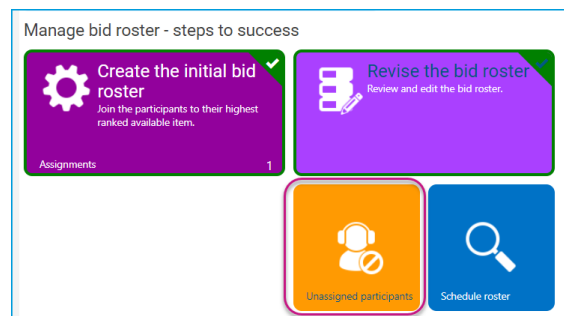
Drag and Drop Assignment

CommunityWFM supports the option to bypass the automatic assignment process and assign schedules using a drag and drop process.



Click the *Unassigned participants* tile to view agents with no schedule assignment.

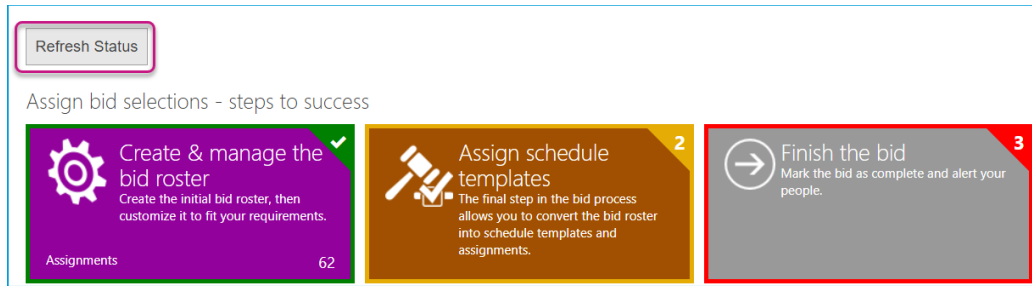
Click and drag the agent tile to the bid item, then *Assign* the schedule.





Close this window to return to the *Assign bid selections steps to success*.

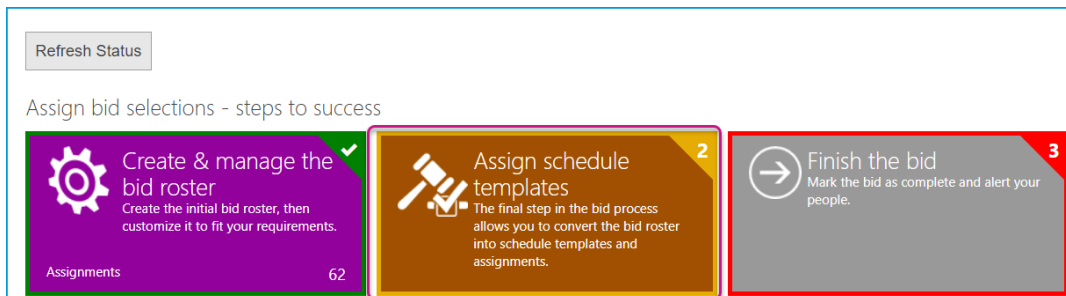
Click *Refresh Status* to enable advancing to the next step.



Auto Creation of Schedule Templates

Following the assignment process, whether automated or using the drag and drop interface, CommunityWFM will automatically build and assign schedule templates to agents to begin based upon the bid’s effective date. CommunityWFM will even neatly file them into a separate sub-folder named for your bid.

- 2. Assign schedule templates.** This is the step that creates the actual fixed schedule templates that match what the agent was awarded in the previous step.



This screen allows customizing the memo sent to agents, generating breaksets if not included, and organizing the generated schedules into folders.

If you did not include bidding on breaksets as part of the inventory, this is where you can add a breakset to the fixed schedule templates. Any selection will apply to all the schedules. If not selected here, you would need to go into each schedule and assign a breakset.



Click *Preview* to view and approve the list. You must *Preview* prior to assigning.

Create and assign schedule templates for **Test agent view**

Default name format

Default description format

Automatically generate breaksets for manually created inventory items.
 Use folder organization for automatically generated schedule templates.

Folder name and format

Default review status

Please provide the following defaults for the schedule template assignment process.

Schedule Bid Property Macros		Inventory Item Property Macros	
Schedule bid id	#ScheduleBidId#	Inventory item id	#InventoryItemId#
Schedule bid name	#ScheduleBidName#	Inventory item name	#InventoryItemName#
Schedule bid effective date	#ScheduleBidEffectiveDate#	Inventory item assigned agent name	#InventoryItemAssignedName#

Note that schedule bid macros can be used with inventory item macros for template name and template description name formats. However, only schedule bid macros are available for the folder name format. To make using the macros easier, you can use your mouse to highlight the entire macro (including # signs), and drag it to the appropriate text box.

Review the assigned schedule templates then click *Assign Templates*.


240	Richert, Jessica	Schedule Bid 25 [Richert, Jessica]	Schedule Bid 25 Assigned Agent Richert, Jessica Effective On 20231002	Fixed
246	Houck, Matthew	Schedule Bid 25 [Houck, Matthew]	Schedule Bid 25 Assigned Agent Houck, Matthew Effective On 20231002	Fixed
250	Horne, Andy	Schedule Bid 25 [Horne, Andy]	Schedule Bid 25 Assigned Agent Horne, Andy Effective On 20231002	Fixed
262	Watkins, Tracy	Schedule Bid 25 [Watkins, Tracy]	Schedule Bid 25 Assigned Agent Watkins, Tracy Effective On 20231002	Fixed
449	McBride, Natasha	Schedule Bid 25 [McBride, Natasha]	Schedule Bid 25 Assigned Agent McBride, Natasha Effective On 20231002	Fixed
271	Mack, Janelle	Schedule Bid 25 [Mack, Janelle]	Schedule Bid 25 Assigned Agent Mack, Janelle Effective On 20231002	Fixed
278	Areheart, Sam	Schedule Bid 25 [Areheart, Sam]	Schedule Bid 25 Assigned Agent Areheart, Sam Effective On 20231002	Fixed
287	Haltiwanger, Debra	Schedule Bid 25 [Haltiwanger, Debra]	Schedule Bid 25 Assigned Agent Haltiwanger, Debra Effective On 20231002	Fixed
306	Crislip, Traci	Schedule Bid 25 [Crislip, Traci]	Schedule Bid 25 Assigned Agent Crislip, Traci Effective On 20231002	Fixed
318	Maluicis, Fernando	Schedule Bid 25 [Maluicis, Fernando]	Schedule Bid 25 Assigned Agent Maluicis, Fernando Effective On 20231002	Fixed

Close this window then refresh the status of the Schedule bid worksheet.




Select *Finish the bid*.

Assign bid selections - steps to success




Create & manage the bid roster
Create the initial bid roster, then customize it to fit your requirements.

Assignments 62



Assign schedule templates
The final step in the bid process allows you to convert the bid roster into schedule templates and assignments.



Finish the bid
Mark the bid as complete and alert your people.

3

Finish bid **Test agent view**

Responsible administrator
Account, Service

Number of participants
63

Number of responses
62

Send a notification memo to Bid Participants.

Send a notification memo to Bid Administrators.

Memo subject

Memo body
Your bid administrators have closed a bid. Plesase check your bid status component for additional details

Close the Bid

In the pop-up, select whether to send notifications to the agents and administrators then click *Close the bid*.

Agents will see a finish line flag symbol with a closed lock and green check. There is a link to *Click here to review assignment* where they can see their assigned schedule and rank.

Holiday 2023

Open date: 26 September 2023

Close Date: 26 September 2023

Effective Date: 20 November 2023

Participants: 61

56 [Click here to review assignment](#)

2013 Bid 33 Item 60, Days: Mon; Tue; Wed; Thu; Sat; Shift Duration: Variable Duration

Badgett, Gregory

	0:00 AM	1:00 AM	2:00 AM	3:00 AM	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	11:00 PM
Monday																								
Tuesday																								
Wednesday																								
Thursday																								
Friday																								
Saturday																								
Sunday																								

Schedule template details

Template Reference Number: 469


Template Name: Schedule Bid 33 [Badgett, Gregory]

Schedule Type: Fixed

Assigned agent details

Assigned Agent: Badgett, Gregory

Item Ranking: 11

Preference Score: 0.00 

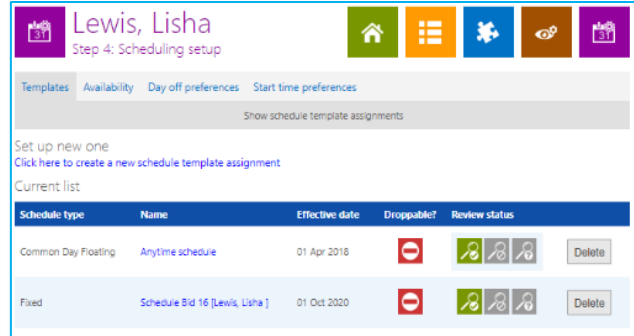


Post Bid Management

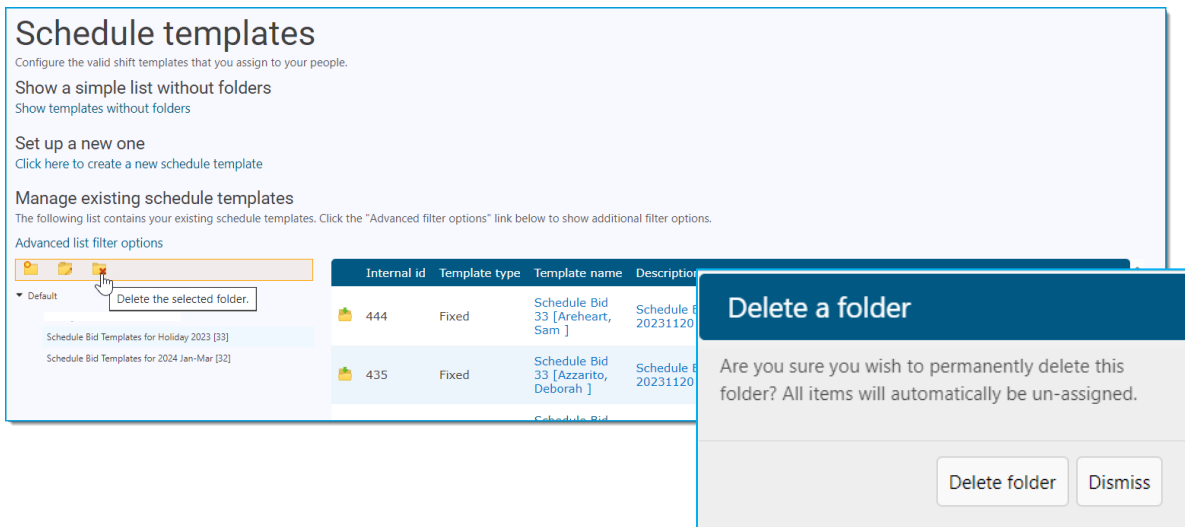
Schedule Template Management

CommunityWFM's unique approach to schedule bidding leverages the same features and configuration options that you would use without a schedule bid selection process.

Schedule templates may be fully edited. Fixed breaks and lunches, when included in the bid as fixed items, may be fully edited. Flexible break and lunch options may be modified as needed.



After selecting the folder of bid schedule templates, there is an option to delete the folder. Doing so will automatically unassign the schedule templates.



Creating a schedule

Now that the schedule templates from the bid are assigned to agents, these will be used when creating optimized schedules for dates on or after the effective date from the bid.



Ranking Profiles

Ranking profiles can use internal fields, such as hire date (seniority), or user created fields such as a performance score. Multiple criteria may be selected as tie breakers.

To set up a ranking profile navigate to Settings > Application settings > People settings > Ranking profiles and select *Click here to create a new ranking profile*.

Ranking profile properties
Create reusable sorting criteria for your people.

Step 1: Basic properties

Name: demo

Description: Sample

Start time preference option: Use the average start time preference for all days of the week

Start time penalty factor: 10 (Significant penalty)

Buttons: Save, Preview

Step 2: Configure sorting criteria

Ordinal	Sort column	Comments
1	Performance Score	▲ ▼ ✕
2	Hire Date	▲ ▼ ✕

Add sort option

Name: Give it a descriptive name. Description is optional.

Start time preference option: Applies to schedule bidding and generating optimized schedules with seniority-based schedule generation. Select whether the system should average the start time across the entire week or use the preferred time from the first scheduled day.

Start time preference option

- Use the average start time preference for all days of the week
- Use the preferred start time of the first scheduled day

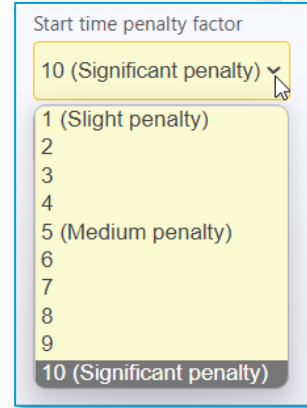
Average start time: If the preferred start time range is 8 am – 10 am, the system will use 9 am as the preference.

Preferred start time of first scheduled day: If Monday preferred start time is 8 am, it will use that time as the preference for the whole week.



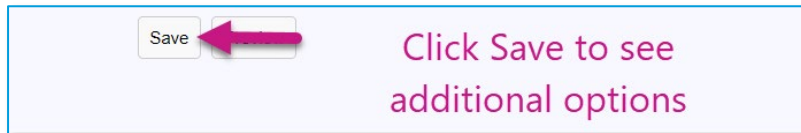
Start time penalty factor:

This provides a way for the scheduling engine to evaluate the quality of the schedule for a person based on their start time preference option. The schedule assignment algorithm will use this as a multiplier when examining the difference between a candidate schedule and a participant's start time preference.



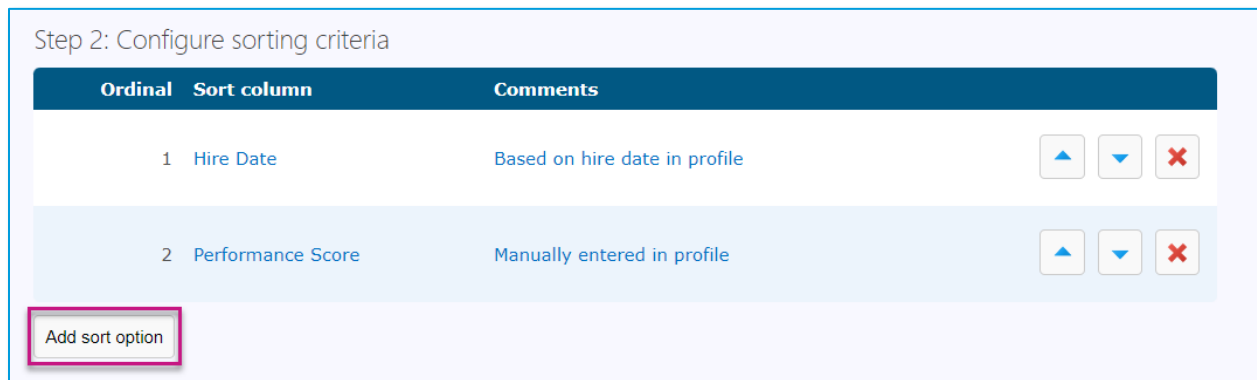
If the value for this field is low ("Slight penalty") then a variance in start time only minimally influences the selection of a candidate schedule. If it is high ("Significant penalty") then it magnifies the variance in start time for a candidate schedule. This start time preference penalty is used to sort the candidate schedules and pick the one with the smallest penalty value.

Click *Save* to go to the next step.



Step 2: Configure sorting criteria. This step determines the order for the sorting criteria. Should hire date (seniority) be the most important/first criteria? Or performance score? It's best practice to use more than one sorting option.

Click *Add sort option*.








The top sort options in yellow are values from the agent profile (either default properties such as hire date or manually entered such as tiebreak value). The bottom options in grey are ones added as custom properties in the agent profile.

After creating and saving the sort options, you can move the order up or down with the blue arrows, or remove an option with the red X.

Step 2: Configure sorting criteria

Ordinal	Sort column	Comments
1	Hire Date	  
2	Tiebreak Value	  
3	Performance Score	